Education in the Asia-Pacific Region:
Issues, Concerns and Prospects 15

Gillian Boulton-Lewis
Maureen Tam *Editors*

Active Ageing, Active Learning

Issues and Challenges

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Series Editors' Introduction

One of the most striking features of the modern world is its changing demographic profile. In almost any policy arena, the issue of demographic change (or ageing) sits alongside globalisation, climate change and the knowledge revolution as areas which are transforming societies, including the ways in which we organise and go about our work activities. This is a significant and worldwide phenomenon. What emerges is a picture of a worldwide trend that touches many aspects of, for example, employment and the labour market, but one which also needs to take account of the very different economies, political systems and societies in the world.

The scale of this demographic change means that ageing is no longer a matter of how individuals adapt to the ageing process but how society adapts to the irreversible changes that are under way. In many countries, current policies and institutions are not designed to address the challenges and opportunities of this future, either in terms of education or the world of work. Looking at Asia, Japan has nearly 23% of the population over 65 years old and for the last 3 years has had negative population growth. Thailand has over 9% aged over 65 but has a population growth rate of approximately 0.6% pa. Taiwan has 10% aged over 65 and has a growth rate that has declined from 0.64% pa in 2000 to 0.23% in 2009. Hong Kong has 12.5% aged over 65, and it is estimated that this will rise to 26.8% by 2033. It also has one of the lowest population growth rates in the world.

A common perception is that an ageing population will have negative consequences for society. We regularly hear alarm bells sounding from governments, particularly in the developed world, about the financial consequences in terms of increased pension, health and care costs and the social consequences through the requirement for additional family care responsibilities and an increased tax base for the ever decreasing working population. Reactions in certain countries have been to consider raising the retirement age, or more accurately, to raise the age at which state pension provisions and other benefits for the elderly will be provided. This is not proving a politically popular option in many countries, especially amongst those people who are approaching retirement age or those that have physically demanding jobs. Singapore has introduced 'from retire to rehire' as a policy measure. This provides

retraining for elderly employees who are approaching retirement age or who have retired and wish (through desire or necessity) to return to the labour force.

What has not actually been proven conclusively is how much actual concrete evidence justifies these government reactions to ageing. We do not fully understand, for example, how changes in the age structure of the population will affect social attitudes, values, norms and behaviours. There is much uncertainty over social and economic variables. Knowledge is continuing to be developed through research into the impact of population ageing, and the contributors to this book provide valuable research and insight to address the key questions that are raised by an ageing population:

- How can a large elderly population that is living longer maintain its productivity and contribute to its own and society's well-being?
- Will an ageing population change the economies, cultures and politics?
- How can institutions and policies related to workforce development and health-care and education be reformed to positively affect the future?
- Will an ageing population widen the gap between the haves and have-nots?
- How will continued learning contribute to active ageing and a healthier lifestyle for people as they age?

Education is going to become increasingly important in an ageing world to enable people, in particular those with physically demanding work, to gain new workplace skills to enable them to work for longer as retirement ages are edged upwards in response to increased longevity.

This book provides a fascinating collection of papers that discuss the issues involved and highlights the dedication and the commitment of the authors in this volume in the field of elderly learning.

Tokyo, Japan — Ryo Watanabe
Hong Kong SAR, China — Rupert Maclean

Foreword

Many countries throughout the world are facing the prospect of a rapidly ageing population over the present and forthcoming decades – with quite radical shifts in the age profiles of their populations. This demographic phenomenon is arising from a complexity of social, economic, aspirational, health and medical factors, resulting in both falling birth rates and higher levels of longevity. It is presenting countries with the demographic reality and continuing prospect of diminishing proportions of citizens of normal working age and increasing proportions of elderly. It is challenging life-stage traditions in which participation in the workforce is seen as ending shortly before a generally short period of retirement in relative passivity and declining health and ability. It is also challenging social services, governments, economic planners, families and individuals with imperatives to review their own understanding and expectations of older persons and the established practices that they have in relation to the elderly.

Prominent among the social service institutions thus affected is that of education, especially from a lifelong learning perspective. A rapidly ageing population underlines the imperative to see educational opportunities and learning engagements distributed throughout the lifespan. It highlights the economic, health and welfare benefits of active learning in older age. It makes nonsense of stereotypes of older persons as non-adaptive, non-learners, fixed in their ways.

Prominent among the countries facing these realities is the Peoples' Republic of China and its Hong Kong Special Administrative Region – the former particularly through the success of its central family planning directives, the latter as the consequence of its advanced economic and social status.

Responding to that context, the Hong Kong Institute of Education has established a Centre for Lifelong Learning Research and Development with a particular focus on elderly learning, through its Elder Academy. An early focus of that Academy was to commission a series of critical reviews to evaluate the issues, policies, research and practices internationally in elderly learning and education. Those reviews – undertaken by a selection of internationally renowned researchers and scholar-practitioners in the field – were designed both to inform its own research and development plans and its advice to government instrumentalities in Hong Kong

and elsewhere. They were commissioned both for formal public presentation through a seminar series in Hong Kong and for international publication, in order to make them more widely available to educational planners, policy makers, providers and concerned members of the public worldwide.

This volume satisfies that latter goal in making a scholarly, informed and critical but very readable and practically grounded set of contributions available to an international readership. The initial set of seminar papers has been here supplemented by others commissioned to further enrich the overall picture of the field.

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Preface

This book provides a unique collection of chapters by authors who are committed to supporting learning by elders internationally and in Hong Kong specifically. It focuses on ageing and learning, describes why learning is so important throughout life, attempts to counter ageism as it affects thinking about learning by elders and others in the community, presents some research in ageing and implications and describes provisions for ageing and learning in some parts of the Asia Pacific region.

The book arose from a series of seminars on Elder Learning, organized by Professor Richard Bagnall, then Director of the Centre for Lifelong Learning Research and Development, which took place at the Elder Academy of the Hong Kong Institute of Education from January to March 2009. The seminars were sponsored by the Elderly Commission and the Labour and Welfare Bureau of Hong Kong. The Foreword by Bagnall explains the origin of the seminars. The unifying theme of the seminars was ageing and learning. The intention was to provide background on issues for learning by elders in Hong Kong. The series included invited presentations dealing with lifelong learning, welfare and mental well-being into older age (Field, 09/01/2009); international educational initiatives for the elderly (Swindell, 16/01/2009); a narrative of learning and longevity (Pfahl, 20/02/2009); education for the elderly: why, how and what? (Boulton-Lewis, 06/03/2009); and Chinese ageism lives on: grassroots reports on elderly learning in rural Shaanxi, Jiangxi and Jiangsu (Boshier, 20/03/2009). To complement the seminars, there are additional invited chapters from Chui, Buys and Miller, Biggs and Tam. Chui describes and compares elderly learning in four different Chinese communities. Buys and Miller discuss the development of a quantitative multidimensional measure of active ageing. Biggs applies critical narrativity to stories of ageing in social policy, and Tam describes policy and support for lifelong learning by seniors in Hong Kong.

This compilation of scholarly work should constitute a valuable recent resource to contribute to the global understanding and knowledge base for later life learning and elder education.

Contents

Chapter 1
Introduction

Gillian M. Boulton-Lewis

The book contains perspectives on the worldwide phenomenon of ageing and its implications, on reasons why elders should keep on learning, on provisions for learning and ageing, ways to measure implications of policies for ageing and active ageing and finally ageing and learning in the Asia Pacific region, including China, other parts of Asia and Hong Kong. It presents and discusses therefore a range of recent issues and perspectives on ageing and learning and should constitute a valuable recent resource for anyone involved in education for elders in Hong Kong, in particular, and elsewhere in Asia. There is some overlap in the issues raised in the chapters, as is to be expected when a series of people are asked to address learning and ageing from different perspectives; however, there is no disagreement about the benefits and need for elders to be assisted to keep learning.

The chapters have been organized into three sections. The first section, concerned with ageing issues and provisions for learning, includes the chapters by Field, Boulton-Lewis and Swindell. The next section, including the chapters by Pfahl, Biggs and Buys and Miller, is concerned with some research methods on ageing issues. The final section focuses on provisions for ageing in parts of Asia and Hong Kong and includes chapters by Boshier, Chui and Tam.

The phenomenon of ageing worldwide, its implications generally and the need and provisions for learning as vital to active ageing are addressed by various authors. Statistics that illustrate what some have called the 'silver tsunami' and its likely social, economic and cultural implications are presented from different perspectives by Field, Boulton-Lewis and Swindell. Field focuses on learning, welfare and mental well-being in older age and includes an overview of the profound changes that have taken place during older adults' lives. The complex consequences of global ageing

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and the policy challenges they present for countries worldwide are discussed. Field points out that many older people are choosing to stay in the workforce, and hence, there is a blurring in the age of retirement and the need for a new understanding of ageing. Field also notes that despite the apparent benefits of continued learning there is a decline in participation with age.

Much of the anxiety about ageing populations, evidenced by governments, is due to the costs of care and health provisions for the elderly at the expense of younger members of the population. However, recent research points to the significant role that lifelong learning can play in promoting mental well-being and resilience and preventing cognitive decline in ageing. There is limited empirical evidence, still mostly correlational, that education in early life or in ageing will halt the decline of cognitive powers. However, it will at least keep older people involved in enjoying and living life fully. It should assist with self-confidence and coping strategies, in maintaining cognitive functioning and knowledge, in health management, keeping up with technology developments, maintaining social relationships and encouraging wisdom. It may even improve neuroplasticity, support new neural pathways and utilize new brain cells (Boulton-Lewis, Swindell, Pfahl). Swindell claims, on the basis of the successful ageing model from the MacArthur Study, an extensive multidisciplinary research project in America, that the fundamental attributes of a successfully ageing individual are: being at low risk of disease and disease-related disability, having high mental and physical function and active engagement with life. These are all interrelated. Maintaining high cognitive functioning is a priority for successful ageing. If the brain is not functioning effectively, other activities are not possible. Learning by people as they age should contribute to independence and self-reliance, reduce social and financial costs of caring and allow elders to continue to contribute meaningfully to society (Boulton-Lewis, Field, Swindell, Pfahl). Boulton-Lewis argues that money invested in active ageing leads to improved health and self-sufficiency and hence reduces costs for governments. Because in recent years there has been a sharp reduction in public provision of recreational education for older adults in Britain, and very little in Australia and most other countries, many older people are turning to the private sector, for example, U3A as described below, reading groups and commercial providers, to meet their needs (Field, Swindell, Boulton-Lewis). Field points out that these opportunities are likely to attract better educated and more affluent elders and neglect the less fortunate. Hong Kong and some other parts of Asia are an exception, and governments are dealing with ageing partly by providing opportunities for active learning by elders.

As a consequence of the poor support for lifelong learning by government and policy makers and the emphasis being on upgrading skills so that older workers can remain in the workforce, a large number of alternative learning initiatives have prospered (Swindell, Boulton-Lewis, Field). The learning opportunities for older learners in a number of countries, by groups described loosely as U3A, are presented in some detail by Swindell. He describes the two alternative U3A models: the French one, mainly sited in universities; and the British one, which is largely a self-help organization. Other approaches have evolved from these models and proliferated in many countries with a range of operations of U3As in Australia, New Zealand,

China and other countries. U3As worldwide incorporate most of the elements for successful ageing and usually include intellectually, physically and socially stimulating learning options prepared and conducted by retired people. Some programmes emphasize skills acquisition, some provide 'catch-up' opportunities and many others focus mainly on the intrinsic value of learning for its own sake. It is suggested that individuals through these groups can influence their own active ageing and transform the stereotypical views which include poor health, decline and dependence because they allow active engagement with life, social networks and the opportunity to do interesting things.

Ageism is evident in most societies but manifests itself in different ways. In the UK and Australia, it is apparent in the lack of government support for learning for elderly citizens (Field, Boulton-Lewis, Biggs). Biggs also discusses ageism in the UK from the perspective of social policy. In rural China, it is strong according to Boshier. Swindell cites work by Harper (2008) who noted that mental development, brain capacity and longevity are closely associated and that unfortunately, UK government policy has tended to equate ageing with large numbers of older people rather than large numbers of people who are just living longer, many of them leading active healthy lives. It is critical that demeaning stereotypes of ageing are challenged and that we accept a new perspective on ageing and learning in modern society. This should focus less on economics and more on quality and continuity of life for all (Field, Boulton-Lewis) and capitalize on older citizens' cognitive resources. It is true that older adults usually experience some decline in physical and cognitive capacities and a risk of social isolation and ill health (Field, Boulton-Lewis) and that educational participation falls with age and reaches very low levels among older adults. Nevertheless, Boulton-Lewis asserts that older people want to keep on enjoying life, participating in society, keeping up with changes and benefiting from problem solving and meaningful activities. Hence, despite age-related decrements in aspects of information processing, we need to focus on what elders can learn and how they might benefit.

The issue of what motivates and assists older adults to keep on learning is important. Boulton-Lewis suggests that sometimes this is in response to life circumstances, or alternatively, it may be due to individual reflection or for continuing self-fulfilment and pleasure. Motivation to learn is also connected with how older people want to learn. Boulton-Lewis claims that as with reasons for learning, how elders want to learn is based on needs and prior experiences and ranges from learning on their own to one-to-one tuition or formal classes. The positive outcomes of seniors researching ageing are also discussed. There is very little research that describes what older people *themselves* say they want and need to learn (Boulton-Lewis); however, there are statements about what others believe is necessary, for example, in health management, finance and use of technology. There is no doubt that we need more data from older people themselves about their attitudes to learning and why, how and what they want to learn. It would also be valuable to have some data about whether such learning has measurable positive benefits.

Boulton-Lewis maintains that use of technology should figure prominently in programmes for practical and cognitive reasons and that studies show that older

adults are capable of learning to use technology but are reluctant to do so. Models for promoting its use are discussed. Swindell discusses novel communication technologies in the context of U3A which can cater for people who are isolated by constraints, such as distance or disability; however, confidence is an issue with technology. He describes its important role in helping to maintain the quality of life for older people with its potential to transform aged care and healthcare. He describes courses presented by U3A using aspects of technology and more recently the use of Internet hosted in Australia.

A different perspective on learning and ageing is proposed by Pfahl, who advocates intentional narrative learning for adults. Her focus is on the relationship between learning and longevity fostered by creating narratives to make meaning of experience. She proposes a research-based narrative learning model and discusses its implications for educators and developers addressing learning. The model interprets cognitive and behavioural narrative processes as contributory elements advancing lifelong human learning.

Biggs' work, using narrativity as a method, addresses a critical issue in social policy and ageing, that is, it interrogates political definitions of later life and how these affect older people. The focus is on policies in North America, parts of Europe and the UK. This insightful approach allows the stories that people live by in later life to be made explicit and considered in relation to policy. He asks how social policy and the stories it implies influence the 'spaces' in which we grow old. He believes that thinking in terms of stories allows us to sidestep determinacy and take a stance on other possible positions. He argues that social policy is important because it not only responds to social problems but consecrates and contributes to them. However, policy can also provide visions of experience, such as those in later life, that 'legitimize a space in which social subjects are able to form publicly accepted identities'. A critical assessment of positive ageing policies in the UK suggests at first sight that these are highly facilitative. They challenge ageism as it affects work and access to services and recognize a greater flexibility in lifestyles, income and potential. They support the importance of social inclusion and autonomy for older people. They provide a narrative that is facilitative for people who can finance their own lifestyles or participate in existing social institutions. However, the story in these policies is lacking in alternative pathways for self and social development other than through work or work-like activities. Analysis of the policies raises issues such as: the forms of ageing that are legitimized and delegitimized, how the narratives fit with the social and political experience of older people and whether an inauthentic policy initiative can contribute to spaces for fulfilling ageing.

Buys and Miller describe the development of a quantitative multidimensional measure of active ageing. They assert that, with estimates that two billion of the world's population will be 65 years or older by 2050, ensuring that older people 'age well' is an international priority. To date, however, there is significant disagreement and debate about how to define and measure 'ageing well', with no consensus on either terminology or measurement. They describe an attempt to identify significant contributions to quality of life for older people. They identified eight distinct elements (grouped into four key concepts) which appear to define active

ageing: social and life participation (25%), emotional health (22%), physical health and functioning (4%) and security (4%). The intention of their chapter is to prompt informed debate on defining and measuring active ageing and facilitating exploration and understanding of the complex issues that intertwine, converge and enhance the ageing experience.

The chapters by Boshier, Chui and Tam contain recent and unique insights into provisions for active ageing in some parts of the Asia Pacific region. Swindell described a thriving U3A initiative in China, more groups than anywhere else in the world, with some of them supported financially. However, Boshier asserts that this is not reaching into rural areas and that ageism is alive and well in rural China. Chui compares philosophies supporting active ageing in China, Hong Kong, Taiwan and Singapore. The chapters show that opportunities for learning in ageing vary from neglect in rural areas of China to thriving initiatives in urban areas to Confucian beliefs supporting lifelong learning to initiatives in Hong Kong where the motivation is partly to reduce the drain on the economy of the consequences of an ageing population by trying to keep people healthy and independent for as long as possible.

Boshier maintains that Chinese ageism is getting worse. His intention was to analyzed sociocultural impediments to elderly learning in China, give voice to impoverished rural elderly Chinese people and argue the case for offering elderly learners serious intellectual work. He noted that in the Confucian state, older people were venerated, but that this was dramatically eroded by political leaders clinging to power in old age and alienating younger people. It could be that Boshier's findings reflect the fact that his work was undertaken in rural areas where many are illiterate, there is no history of academic activity and where U3As would be difficult to establish. As a result, he maintains that most elderly people in rural China rarely encounter serious intellectual work; are expected to amuse themselves with hobbies, arts, exercise or menial work; and that ageism, human rights and marginalization are prevalent. In rural villages, many mind children while parents work away. He asserts that any serious attempt to build a harmonious society must involve respect for the elderly and determined attempts to foster their learning.

Older adults should not be seen as problems but valued and respected. As active and informed citizens, they are vital to building a harmonious society. Boshier asserts that there are exemplary learning programmes for older adults in China, but a habitual tendency to locate them within formal education inhibits a culture of learning; and too many Chinese officials have prejudicial ideas about elderly persons. Instead of fostering docility, officials should stress active citizenship; there are innovative elements in the national learning initiative, but little is available to senior citizens in rural areas and solutions must reside in communities. People involved with fostering elderly learning in China need arenas wherein they can gather and exchange ideas. Boshier maintains that learning is the heart of addressing nearly every problem in rural China – it could improve health care, environment, economy and other crises. He proposed what might be a template for elderly learning in China in the form of the imaginary Shuang Yu learning village which is committed to making learning the central focus of rural life. Village activists conducted consultations with local people and came up with a learning code which stated that the

village was committed to all forms of learning and that everyone should engage in it. A small but energetic group of the fictional Shuang Yu senior citizens felt the last years of life should involve significant learning and possibilities included computers, Chinese art and history, and heritage conservation.

In China, Hong Kong, Taiwan and Singapore, in the Chinese communities, many people still practise and think in a Confucian way, sharing the same Confucian-heritage cultural background from the past. As learning is an essential part of the Confucian culture, it is of interest to determine whether Chinese people with a Confucian background perceive continuation of learning, as they age, differently from each other in the different countries. By elucidating the patterns of elder learning in the four Chinese communities, Chui's chapter explores why and how these older learners pursue lifelong learning, what motivates them to continue to learn and how they would like to be engaged in the learning process. The premise of the comparisons is that their learning approach and behaviour would reflect to some extent the cultural values inherent in each of the four Chinese communities. He also provides a comprehensive picture of the context and provisions for elder learning in the four countries.

In the following chapter, Tam echoes the importance of continued learning to active ageing. She first points out that very little has been said about the impact of cultural influences on elder learning and that no one has discussed learning for and by the elderly across different cultural contexts. Her chapter tries to fill this gap by elucidating the East–West dichotomous view towards lifelong learning by elders in the two different cultural contexts. The chapter then outlines the benefits of continued learning for active ageing and sheds light on a range of learning issues for older learners, including their interests, instructional preferences, facilitators and barriers to participation. In the context of Hong Kong, Tam examines the policies and provisions for elder learning, notes that the Hong Kong government understands that learning is vital to active ageing and has demonstrated this in reports and action, most notably, by setting up the Elder Academy Network to aim at 'education for all ages'. The government has since taken a coordinated approach to later life learning where it is conceived of as an integral part of healthy ageing and is encouraged in the forms of social campaigns, initiatives and even funding support to providers. The Hong Kong government has committed to policies and provided financial support or other resources to help providers run courses and programmes for elders. However, there is limited information as to the effectiveness and impact of such policies and provisions on stakeholders. Tam asserts that there is a critical need for research and evaluation to review the effectiveness, adequacy and the take-up of programmes for and by elders in the Elder Academies.

In summary, the chapters in this book provide considerations of:

- Worldwide population ageing and the implications for learning, welfare and mental well-being in older age
- The reasons, processes and content for learning for the elderly
- Learning opportunities for older learners in a number of countries, all of which can be loosely described as U3A