Articles

Older Adult Learners: A Comparison of Active and Non-Active Learners

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Abstract

This paper reports on a 2004 follow-up study conducted in partnership with the University of Manitoba Continuing Education Division and local senior's organizations. The partnership was formed in 2002–03 to promote applied research on lifelong learning and older adults, develop new and complement existing educational activities, and explore new program models and instructional methods to meet the educational needs of retirees. The partnership involved the development of a number of activities: University in May started in 2002, a mini medical series began in 2003, and a survey was completed in 2003 to identify the learning interests, motivations, and barriers among active older adults who participate in learning activities.

Résumé

Cet article fait le compte-rendu d'une étude de suivi en 2004, une étude entreprise avec la Division de l'Éducation permanente de l'Université du Manitoba et des organismes locaux de personnes âgées. Le partenariat fut créé en 2002-03 afin de promouvoir la recherche appliquée sur l'apprentissage continu et les personnes âgées, de développer et de complimenter de nouvelles activités pédagogiques ou des existantes, et d'explorer de nouveaux modèles de programmes et de nouvelles méthodes pédagogiques pouvant répondre aux besoins pédagogiques des retraités. Ce partenariat a développé de nombreuses activités, dont : en 2002, le lancement de l'université au mois de mai , en 2003, le lancement d'une mini série médicale , et en 2003, la complétion d'un sondage identifiant les inté-

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The 2004 follow-up study compared barriers to participation, learning interests, and motivation to those of a similar population of older adults who held membership with the organizations but had not participated in educational activities for the past two years. The results indicate that the non-active respondents are older, less healthy, less active, less educated, and have lower incomes. Time and motivation to participate may be affected by their socioeconomic standing, health, and sense of well being; that is, their perception of their social reality. Further study to explore the definition of barriers to participation and life long learning for older adults is warranted. Recommendations for program models to facilitate participation in educational opportunities should also be explored.

rêts, les motivations et les obstacles d'apprentissage parmi les personnes âgées qui participent aux activités d'apprentissage

L'étude de suivi de 2004 compara les obstacles à la participation, aux intérêts d'apprentissage, et à la motivation aux obstacles d'un groupe similaire de personnes âgées qui étaient membres de ces organismes, mais qui n'avaient pas participé aux activités pédagogiques pendant les dernières deux années. Les résultats indiquent que les répondants non actifs sont plus âgés, moins en santé, moins actifs, moins instruits, et touchent à un faible revenu. En ce qui concerne la participation, il se peut que le temps et la motivation soient influencés par la situation économique des participants, leur santé, et leur sens de bien être ; c'est-à-dire, leur propre perception de leur réalité sociale. Une étude plus poussée qui explorerait la définition des obstacles à la participation et l'apprentissage continu auprès des personnes âgées est justifiée. Aussi devrait-on explorer les recommandations de modèles de programmes facilitant la participation aux occasions pédagogiques.

Introduction

Seniors' centres in Manitoba were established as educational, cultural, recreational, and health-promotion programs for seniors by seniors and were designed to offer creative challenges, intellectual stimulation, pleasure in learning, and mastery of new skills to a large number of basically active people retiring from the workforce (Fleming, 1986). The underlying philosophy was that lifelong learning promotes intellectual, physical, emotional, and social well-being where the well-being of individuals and the health of the communities are interdependent. This approach to working with a well-elderly population is based on a health-promotion and wellness model. Health is determined by social and environmental factors (versus medical care), and health promotion enables people to take control over and improve their health through personal choice and social responsibility to create a healthier future (Meeks & Johnson, 1988; Wagner, Grothaus, Hecht, & La Croix, 1991). The continued involvement of this population in educational activities may lead to improved quality of life and satisfaction and to overall health and wellness (Withnall, 2002). Over the years, these seniors' centres have offered a variety of continuing learning opportunities, most of which may be defined as informal and non-formal learning, and understanding why older adults choose not to participate in such educational opportunities is useful for both research and practice.

Related Literature

Retirement is a fairly new concept, having only come into existence in the 20th century. In the past, retirement was often seen as synonymous with the gradual cessation of any and all activities and was characterized by illness, disability, a burden for caregivers and society, and a cost to taxpayers. Retirement was believed to create difficulties for older adults, particularly as they aged, by failing to provide them with new roles to replace those lost in retirement, by excluding them from the mainstream of life, and by reducing their social contacts and status. The adult education literature suggested that participation in formal educational programs by older adults, regardless of educational level, also declined with age (Merriam & Caffarella, 1999). These stereotypes subsequently influenced policies and practices regarding older adults.

In contrast to this view, today's older adults are significantly different from those of 20 years ago. Advances in technology, health, and education have contributed to a societal shift in thinking from the young to the old; indeed, older adults now comprise one of the fastest-growing population groups. They live longer, obtain higher levels of education, seek opportu-

nities to travel, maintain careers, and have interests and social networks (Denton & Spencer, 1995; Novak & Campbell, 2001; Statistics Canada, 1997). Successful aging, characterized by minimal or no decline in function, is an achievable goal for many older adults (Ebersole & Hess, 1990; Hamberg, Elliott, & Parron, 1982). More recent thinking on creative retirement for older adults has considered the phenomenon of a large, basically active group of older adults who, on retiring from the workforce, want creative challenges, intellectual stimulation, pleasure in learning, mastery of new skills, control of their learning, and the ability and opportunity to contribute to their community (AARP Survey on Lifelong Learning, 2000; Thompson & Foth, 2002).

There is, however, a dearth of research on older adults who do not participate in educational activities, little information on their demographic characteristics, and little or no evidence to support the benefits of these activities (Withnall, 2002). Such research will contribute to our knowledge about older adult learners by answering some basic questions: Who are these older adults who do not participate in educational activities? Why don't they participate? What are their motivations and barriers? What learning activities might meet their needs and interests? These data will provide some direction for future research and practice and may help to design learning opportunities that lead to an improved quality of life and overall health and wellness for older adults.

The Study

The authors followed up a 2003 study of older adults with a 2004 study that compared a population of older adults from two different seniors' organizations with the 2003 study respondents (Sloane-Seale & Kops, 2004). The 2004 study respondents had not recently participated in educational activities, while those in the 2003 study had been actively involved in a range of educational activities. The 2004 study replicated the structured survey of the previous study to explore factors such as demographics, learning methods, motivations, and interests in an effort to understand how to more effectively develop learning opportunities for older adult learners.

Method

Survey methodology was used to collect the data (Babbie, 1995; deLeeuw, 1992) in both studies. The survey instrument contained structured items designed to gather demographic data and information related to learning experiences, interests, motivations, and barriers; a number of items were drawn from two existing survey instruments (AARP Survey on Lifelong Learning, 2000; Lamdin & Fugate, 1997). It was necessary to modify items to

take into account the particular Manitoba context and the feedback results from the pre-test of the instrument.

Population and Sample

The 2004 study sample consisted of 1,300 older adults, identified as non-participants in educational programs, from two different seniors' organizations. A group of 500, all of whom were identified as non-participants, was surveyed by telephone; the response rate for this group was 34%, based on 172 responses. A second group of 800 was mailed the survey and initially asked to identify whether or not they had recently participated in educational programs. The response rate for the second group was 23%, or 184 of the 800 who were mailed the survey; of these 184 respondents, 91 indicated they were non-participants in educational programs. The combined data set of non-participants yielded 263 usable surveys, representing a total response rate of 20%.

The 2003 study consisted of a sample of 336 adult learners who were registered in classes at a seniors' organization; 286 of these learners completed the survey, for a response rate of 85%. The data set was comprised of responses from 227 usable surveys.

Data Analysis

The survey instrument comprised three parts: demographics (e.g., gender, age, marital status, educational background, income, residence, volunteer activity, health, and wellness); involvement with the seniors' organizations (e.g., membership and modes of transportation); and learning activities (e.g., content, motivation, learning resources, and barriers). For both studies, data were collected, coded, and analyzed using a computerized system.

FINDINGS

Data from the 2003 study of active respondents were compared with data from the 2004 follow-up study of non-active respondents. The data are reported at the aggregate level and are discussed in two sections corresponding to the purpose of the study: demographics and learning experiences. For each question, there were a number of "no response(s)"; therefore, the percentages did not always compute to 100.

Demographics

Demographic data served to provide a profile of both active and non-active respondents. Data on gender, age, marital status, educational level, retirement status, income, health, wellness, and volunteer activity are provided below.

Table 1: *Gender*

Gender	Active respondents (N=227)	Non-active respondents (N=263)
Male	32% (73)	22% (58)
Female	64% (146)	76% (201)

Overall, there were more females than males in both groups, and there was a higher proportion of females among the non-active respondents (76%), compared to the active respondents (64%).

Table 2: *Age*

Age	Active respondents (N=227)	Non-active respondents (N=263)
49 or less	3% (7)	1% (1)
50-59	22% (50)	5% (13)
60-69	51% (115)	33% (84)
70-79	19% (43)	39% (99)
80+	5% (10)	22% (55)

On the whole, the non-active respondents were older than the active respondents. In the 70 and older categories, there were more non-active respondents (61%) than active respondents (24%), while in the 69 and younger categories, there were more active respondents (76%) than non-active respondents (39%).

There was also a higher proportion of single, specifically widowed, respondents among the non-active respondents, compared to the active respondents.

Table 3: *Level of education achieved*

Level of education achieved	Active respondents (N=227)	Non-active respondents (N=263)
Less than grade 9	0.4% (1)	3% (8)
Some HS	8% (18)	21% (56)
HS graduate	9% (20)	24% (63)
Some community college or university	22% (49)	18% (48)
Community college or university graduate	57% (129)	25% (67)

There was a lower education achievement among non-active respondents (43% had gone beyond high school), compared to active respondents (79% had gone beyond high school).

Table 4: *Retirement status*

Retirement status	Active respondents (N=227)	Non-active respondents (N=263)
Retired	84% (190)	87% (230)
Semi-retired	7% (15)	6% (15)
Work full-time	1% (4)	-
Work part-time	1% (2)	3% (7)
Self-employed	2% (4)	0.4% (1)

Retirement among active and non-active respondents was similar, with comparable proportions in each category. More non-active respondents had retired for a longer period of time. This was consistent with the finding that non-active respondents were older and, thus, had been retired longer than active respondents.

Non-active respondents reported lower incomes than active respondents; almost twice as many active respondents reported incomes of $40,000 and higher.

Table 5: *Health status*

Health status	Active respondents (N=227)	Non-active respondents (N=263)
Quite above average	19% (44)	8% (22)
Somewhat above average	37% (83)	24% (63)
Average	31% (71)	41% (109)
Somewhat below average	10% (22)	22% (57)
Quite below average	1% (2)	3% (7)

Non-active respondents reported feeling less healthy than active respondents. A higher percentage of active respondents (56%) indicated that their overall health was somewhat or quite above average, compared to non-active respondents (32%), while a higher percentage of non-active respondents (25%) reported that their health was below or somewhat below average, compared to active respondents (11%). Poorer health among non-active respondents may have been a reflection of the age differences between the groups.

Non-active respondents engaged less in volunteer activity in their community than active respondents. Age, retirement status, and health differences may have compromised the ability of non-active respondents to participate in educational activities and in their community.

Learning Experiences

Respondents were asked a number of questions about their education/learning experiences, including motivation and barriers to participation, learning preferences, and participation levels. The responses to these topics are provided below.

Motivation and Barriers to Participation

Respondents were asked to identify their motivation for learning and the barriers to their participation in learning. They reported a broad range of reasons for participating or not participating:

Table 6: *Motivation for learning*

Motivation for learning	Active respondents (N=227)	Non-active respondents (N=263)
For the joy of learning	77% (176)	52% (137)
To pursue interest or hobby	73% (167)	57% (149)
To learn a new skill	57% (132)	27% (72)
To meet people & socialize	33% (76)	48% (127)
To fill time productively	31% (72)	26% (69)

There was consistency among items selected by each group, although there were lower overall scores for each item among non-active respondents. For both groups, the least-motivating reasons for learning were: help in my job/career, fill a community-service purpose, and deal with a life event.

Table 7: *Barriers to learning*

Barriers to learning	Active respondents (N=227)	Non-active respondents (N=263)
Not enough time	53% (120)	40% (105)
Insufficient offerings of interest	26% (59)	19% (50)
Lack of information	26% (68)	8% (20)
Money (too expensive)	19% (45)	26% (68)
Lack of motivation	16% (36)	26% (69)
Fear of new technologies	12% (28)	7% (19)
Lack confidence in learning ability	11% (27)	10% (27)
Lack of transportation	8% (19)	21% (56)
Physical disability	4% (9)	25% (65)

Respondents were asked to identify the barriers that most prevented them from participating in learning activities. For both groups, the main barrier that limited participation was not enough time (this seemed counterintuitive since retirees were expected to have more time in retirement).
A number of differences were noted between the groups, specifically, money, lack of motivation, lack of transportation, physical disability, and lack of information.

Learning Preferences

Respondents were asked to identify their preferred way of learning, the learning resources and learning organizations they used most frequently, and their learning interests. As noted in Table 8, they offered a broad range of responses.

Table 8: *Learning resources used*

Learning resources used	Active respondents (N=227)	Non-active respondents (N=263)
Take classes, seminars, workshops (not school, college, or university)	81% (183)	50% (132)
Read newspapers, magazines, books, or journals	74% (167)	75% (198)
Find friend/tutor to teach me	43% (97)	39% (103)
Enrol in course at school, college, or university	37% (85)	21% (55)
Look for informational TV or radio programs, audio/video	37% (84)	43% (114)
Get involved in community group or volunteer organization	30% (68)	36% (94)

Although there was consistency between the choices of both groups, active respondents (81%) scored the structured learning resources option higher than non-active respondents (50%), and non-active respondents indicated a preference for non-structured, personal learning resources. Both groups reported using formal learning, that is, enrolment in a school, college, or university course, to a limited extent. For all respondents, the resource used least frequently was searching the Internet (chat groups; computer-based teaching programs). Both groups preferred informal, person-centred settings versus formal, institutionalized settings (e.g., universities, colleges, public schools). Active respondents and non-active respondents, respectively, reported the least preference for Elderhostel, alumni organization, and private college learning resources.

Table 9: *Learning interests*

Topics of interest	Active respondents (N=227)	Non-active respondents (N=263)
Technology (computer-related topics)	53% (120)	29% (76)
Art (music, dance, photography, crafts)	51% (116)	40% (104)
Leisure (repairs, family history, travel, gardening)	49% (111)	43% (112)
Health (nutrition, sports, fitness)	47% (106)	51% (134)
Personal development (religion, self-discovery/ improvement)	44% (100)	31% (83)
Financial (planning, investment)	29% (66)	22% (57)

Non-active respondents had lower response rates than active respondents for each topic of interest, except health. The most notable difference in response rates was for technology. This can likely be explained by the fact that many of those in the active-respondent group had been selected from computer classes. Of particular interest is that non-active respondents frequently chose person-centred activities (e.g., leisure and health).

Participation Levels

Respondents were asked to identify the number of courses, both credit and non-credit, that they had taken in the past two years. As well, they were asked to identify the time they had spent on formal or institutionally sponsored learning and informal or self-planned learning. Finally, respondents were asked to comment on the importance of continuing learning to successful retirement. Their responses are reported in Table 10 and Table 11.

Both groups of respondents took few credit courses. In the previous two years, more non-active respondents (85%) had not taken a credit course, compared to active respondents (75%). Although there were respondents from both groups who had not taken any non-credit courses in the past two years, active respondents engaged in more non-credit courses than non-active respondents.

Respondents were asked to estimate the time they spent in a typical month on formal or sponsored learning (e.g., courses, seminars, workshops,

lectures). Overall, active respondents spent more time per month on formal or sponsored learning activities (70% reported spending 6 or more hours) than non-active respondents (29% reported spending 6 or more hours).

Table 10: *Number of credit and non-credit courses taken*

Number of courses taken	Active respondents (N=227)		Non-active respondents (N=263)	
	Credit	Non-credit	Credit	Non-credit
None	75% (171)	15% (34)	85% (223)	49% (130)
1–2	11% (24)	21% (47)	6% (16)	31% (81)
3–4	4% (9)	30% (69)	3% (7)	10% (26)
5–6	1% (3)	15% (34)	0.3% (1)	3% (8)

A less dramatic difference in participation emerged between the groups when they were asked to estimate the time they spent on informal or self-planned learning (e.g., learn on own projects and activities) in a typical month. Overall, active respondents reported spending more time per month on self-planned, informal learning activities (75% reported spending 6 or more hours) than non-active respondents (51% reported spending 6 or more hours).

Table 11: *Time spent in formal and informal learning*

Time spent in learning	Active respondents (N=227)		Non-active respondents (N=263)	
	Formal	Informal	Formal	Informal
Less than 5 hours	28% (63)	19% (42)	63% (167)	43% (112)
6–10 hours	34% (77)	27% (62)	18% (47)	27% (71)
11–15 hours	18% (40)	19% (44)	5% (13)	8% (22)
16–20 hours	11% (25)	13% (29)	2% (6)	7% (18)
More than 20 hours	7% (16)	16% (37)	4% (11)	9% (23)

A majority of the active respondents endorsed the importance of learning in retirement. In contrast, only half of the non-active respondents reported that educational opportunities were important in their retirement.

Discussion

Little research exists on the demographics and educational experiences of either active or non-active older adult learners. Although generalizations cannot be made from this study, a number of observations can be made to connect the study data to the literature and to continuing education practice.

Demographics

In this study, compared to the active respondent, the non-active respondent is older (between 70 and 84 years), not as highly motivated or healthy, and more likely to be widowed than married. She is likely not as educated as those in the active-respondent group, having completed some high school and/or graduated from high school (versus being a community college or university graduate). When compared to her counterpart in the active-respondent group, her income is most likely to be less than $40,000; she has been retired for a longer period of time (more than 10 years); and she is less active in structured, organized educational opportunities and volunteer activities. These findings are consistent with the picture portrayed in the adult education literature; that is, in general, those with less education tend to have lower levels of participation in educational activities, lower economic achievement, and lower socio-economic status (Statistics Canada, 2000), and more women than men continue to participate in educational activities.

In contrast, active respondents appeared more self-sufficient, could afford to pay for their educational activities, and may have had little concern for minimal pricing if offerings were perceived as fair value and high quality. These active, healthy respondents may also have placed a high value on learning experiences that were relevant, meaningful, and challenging due to their educational background. They had limited or no physical disability (4% versus 25% for non-active respondents). These data on active older adults were also consistent with the picture presented of active older adults in the current literature (AARP Survey on Lifelong Learning, 2000; Thompson & Foth, 2002), particularly with reference to members of the aging baby-boom generation who were reported to be active, healthy, educated, and wealthy. Furthermore, increased education and training had led to their increased participation in educational activities, as well as to improvements in their mental, spiritual, and physical well-being (Ebersole & Hess, 1990).

Learning Experiences

Active and non-active respondents alike had a wide range of learning interests, preferences, and motivation for learning, although some topics and preferences clearly were of more interest to one group than the other. Non-active respondents appeared to be more activity-oriented learners compared

to their counterparts, who seemed to be more learning- and goal-oriented learners (Houle, 1961). Non-active respondents preferred person-oriented activities (health and leisure) and informal, non-structured learning methods and resources (hands-on, in groups, watch and listen, read newspapers, magazines, books, and journals) compared to their counterparts, who chose more formal, structured learning activities (technology, art) and learning methods and resources (formal teacher-classroom; taking classes, seminars, and workshops). For both groups, the items of least preference were: self-study courses (method); searching the Internet (resource); and universities, colleges, and public schools (learning organizations).

Active respondents' choice of structured learning resources (classes, seminars, and workshops) and learning preferences (formal teacher-classroom) suggested that they would participate in courses and programs offered by learning organizations. However, all respondents preferred to learn in a group, using hands-on methods, which may indicate that they want to be actively engaged in learning or have interactive opportunities in the learning situation. Their lack of interest in self-study courses implied that correspondence/distance education learning may not best serve older adult learners. Overall, the less than high endorsement of courses at educational institutions may suggest that either there is a limited array of available courses that makes this option less attractive (and fits with this study's responses to the question of barriers to learning) or the courses offered by educational institutions are not highly valued (which relates to the issue of value for time).

Another plausible explanation may be perception. Older adult learners may perceive courses offered by educational institutions to be geared toward younger students seeking degrees and diplomas. Educational institutions need to check these perceptions carefully and then react, accordingly, to any misconceptions that may exist. The data may suggest that educational institutions could best serve older adults by working collaboratively with non-educational community partners. The responses also indicated a tendency for both groups to learn on their own by reading and learning from friends or tutors. As well, it is interesting to note that, on the whole, all respondents spent more time per month on informal than formal learning. The emphasis by older learners in this study on informal (self-planned) learning parallels the finding of the AARP Survey on Lifelong Learning (2000).

Barriers affect a person's ability to participate in learning activities. In terms of this discussion of participation, three types of barriers are relevant:

1) Institutional (created by learning organizations)

2) Situational (associated with the circumstances of the learner)

3) Dispositional (related to the attitude of the learner) (Cross, 1981)

By identifying and addressing barriers, one can potentially increase participation in learning activities. The single most important barrier identified by all respondents related to their situation, that is, their lack of time to engage in learning. Non-active respondents, however, reported additional barriers (e.g., money, lack of motivation, lack of transportation, and physical disability) that may shed some light on the time barrier. Some of these barriers may have compounded these respondents' time barriers if they perceived themselves as less healthy and without transportation. Indeed, these factors may have contributed to their dispositional and situational barriers of lack of motivation, physical disability, and poor sense of well-being. Time and physical ability should be further understood within their perception of their social reality. Time as a barrier should be reconceptualized in terms of age, physical ability, and mental attitude to accomplish the ordinary tasks of daily living that might require more physical and mental time.

As noted earlier, non-active respondents did not appear to participate in learning simply to fill time. Their time was a limited commodity that had to be used meaningfully. Educational planners need to be cognizant of the fact that older adult learners may value time differently, perceiving time not as exponential but as a limited resource. Thus, planners should ensure that educational programs offer good value for time spent; otherwise, as is the case with adult learners generally, they will "vote with their feet" and not participate. The two other barriers that all respondents identified related to institutional barriers (i.e., insufficient offerings of interest and lack of information). This finding suggests that learning organizations, such as university continuing education units, may need to modify their practices to address these barriers.

Conclusion

The results of the study described in this article offer a number of things to consider, both in terms of the nature of potential partnerships and the approaches to program planning that will best serve older adult learners. The formation of a partnership between an educational institution and a community organization serving older adult learners appears to be a sound strategy because, among other things, the learners surveyed in this study preferred learning for interest in non-educational settings or on their own. Over time, programming may be provided more directly at the university as preferences change through positive experiences, but, initially, programming through a community organization seems prudent.

Although the active respondents in this study appeared to be interested, motivated, and physically and financially capable learners, the non-active respondents seemed less so. Non-active respondents were engaged in learn-

ing activities, albeit informal, non-structured ones, but their primary reason for participating was neither to learn new skills nor to fill idle time. At the same time, they confronted dispositional, situational, and institutional barriers to learning that needed to be overcome. For non-active respondents, the issue of time may be perception and social reality, as well as being strongly linked to money, health, and well-being and thus motivation. This finding suggests that simply removing barriers without the provision of appropriate supports (e.g., emotional, physical, financial) and an emphasis on the improved quality of life and better health and wellness that may result from a learning opportunity may not facilitate participation in lifelong learning opportunities. Instead, these supports and benefits must be embedded in program delivery.

Program planners must pay attention to not only attracting but also retaining older adult learners. As well, the survey data suggested that consideration should be given to developing new program models that allow learners to link to their informal (self-directed) learning activities. The study's active respondents endorsed the importance of learning that fits with the notion that an active lifestyle (including continued learning) leads to an improved quality of life and better health and wellness for older adults. Although non-active respondents engaged in informal learning activities, they did not readily perceive the benefits of these activities to their retirement. Further research is warranted to explore the various meanings of barriers and lifelong learning within the context of older adult learners' social reality. University continuing education, in partnership with seniors' organizations, has a role to play in developing and supporting learning opportunities and programs for older adult learners, albeit, a measured one.

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