An investigation into the learning of a group of elderly New Zealanders

A thesis presented in partial fulfilment of the requirements for the degree of Master of Education at Massey University

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1998

Keywords

bowling club; educational gerontology; elderly; New Zealand elderly.

Abstract

It would appear that no basic research into *educational gerontology* has been conducted in New Zealand although a few facts about the elderly and their learning can be found in studies about *continuing education*. This study is an attempt to redress the position.

Sixty-nine people over sixty years of age, mainly from a bowling club, completed a questionnaire relating to their learning and their backgrounds. They provide a picture of physically active and socially involved late adulthood.

Retired people appear to differ mainly from those still working in having experienced more of life and in no longer having to cope with the pressures of work. Consequently, once adjustment to retirement has been made, they have the opportunity to pursue interests that were either unavailable during, or formed a minor part of, their working lives.

These people not only remain aware of current happenings but use a range of learning methods to advance knowledge of their interests - formal courses being but one. It seems highly improbable that age, gender, income level, or educational background can be used to predict the forms that retirees, such as these, will use for learning.

Acknowledgments

Without the help of the people named below this work would not have been completed.

Brian Shaw suggested that I should gain some background to educational gerontology by studying a special topic. To this end he introduced me to ***Sue Watson*** who became my tutor.

Sue Watson supervised the preparation of this thesis and must have interrupted her heavy schedule of work to give me assistance.

Janet Gregory was not actually called upon to help but was ready to assist when Sue was unavailable.

The ***distance library staff*** went to considerable trouble to supply requested journal articles and books, usually within a day or two.

Members of the bowling club who were involved particularly ***Norm MacPherson*** who acted as liaison with the club's executive.

Tom Nalder provided a great deal of assistance in the early stages.

Alison Speakman assisted with the compilation of data.

Shirley Nalder did not growl too often at the hours I spent at my computer and word processor.

I have to acknowledge the assistance given by those people and proffer my thanks to them.

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1 - Introduction

This research focuses on the societal group labelled *elderly.* This term is generally used without precision. It can, however, be shown to mean quite different age groups from culture to culture, from era to era, and according to the age of people. For instance the pre-European Maoris were elderly when aged about 30 (Houghton, 1980) while today's Maoris have a life expectancy of about 68 (Koopman-Boyden, 1993, citing Pool, 1991). The average length of life of the English circa 1849 was 41 (Schaie & Willis, 1991) but now their descendants (in New Zealand, at least) can expect to live until their early seventies (Statistics New Zealand, 1995).

Because of negative attitudes and stereotypes of the elderly (Ageing and Education Working Party, 1987) it is not generally realised amongst younger age groups that the only important differences between adults who have retired and those still in the work force are experience, length of life, presence in the work-force and society's expectations. It is not generally recognised by younger people that many of the elderly do not consider that they are old. In everyday life it is quite common for younger people to consider as elderly anyone who is more than fifteen or so years older than themselves. It is similar amongst those over sixty.

In modern "western" societies the term "elderly" is usually applied to those who have retired from work. In New Zealand it is increasingly being used when referring to those who are in receipt of, or who are eligible for, the national superannuation, which is now available, dependent upon the date of birth, at some age between sixty and sixty-five (Koopman-Boyden, 1993). Statistics New Zealand (1995) uses the latter age as a simple boundary between middle and old age. "It is the age at which entitlement to retirement income, New Zealand Superannuation, will be guaranteed from 2001" and "it is also the age at which many employers are requiring employees to retire" (p.11).

Although in this study the age of sixty, which is an easy-to-calculate reference point, is taken as the beginning of old age it must be stressed that chronological age per se has no real significance in the aging process. Aging is influenced by the interplay of culture, ethnicity, gender and disease together with the interaction of genes, body functioning, and reasoning abilities (Hayslip & Panek, 1993, and Bergener, 1988). As there is no easy measure of all these factors there is no real point at which one can say that a particular person is elderly.

It is therefore simplistic to assume that older adults form a homogeneous group. As in any other group of adults with a forty year age range there are differences in experience, in ethnic, genetic, social and educational backgrounds, in gender, in culture, in religion, and so on. The elderly form a more diverse group than any other developmental section of society when physical condition, experience and societal positions are examined (Eisdorfer & Mintzer, 1988; Koopman-Boyden, 1993; and Swindell, 1991, cited by Heppner, 1994a). In order to differentiate between those who could be considered stereotypically old and those who are physically and mentally active Neugarten (1988) has introduced the terms "old-old" and "young-old". These terms refer more to the older person's attitude to life and manner of living than to age so that an "old-old" person can be younger than one defined as "young-old". Hence the majority of adults over sixty who do not consider themselves elderly probably fall into the latter group.

This study is, in part, an effort to provide information about how some aspects of the backgrounds of a sample of *elderly* New Zealanders have affected their learning practices since retirement. Although little has been written about the learning of older people, and even less has been the result of empirical studies, it has been assumed that their needs and abilities are quite different from those of younger age groups. It has also been accepted that various elements of their present and past circumstances influence their learning activities.

While accepting these precepts the present author has felt that in some cases older adults have shown markedly different characteristics from those proposed and accepted by a large number of writers in the field of educational gerontology. For instance it has been suggested that because older people do not participate in courses to the same extent as younger adults, special courses must be organised for them. It has also been proposed that the learning activities of the elderly are dependent upon the level of their incomes. However observation has noted that these and other suppositions were not appropriate for some older adults. So this study set out to examine the learning activities of the present generations of older adults and to discover whether they had learning needs which were specific to their group and not being catered for. The results from such a study would then provide a more informed basis for policy recommendations about educational provision for the growing number of elderly people in New Zealand.

2 - Literature Review

Educational gerontology is a term used by Glendenning (1985, 1989) which he stated was originally introduced by Peterson, (1978) to describe the learning patterns, the learning experiences, and the approach to learning of the elderly. Little empirical work has been done in educational gerontology overseas although social gerontology has been under intense scrutiny, particularly in the United States of America (Glendenning, 1985).

Studies either by, or reported by, Battersby (1982a), Eisdorfer (1967), Granick & Friedman (1973), Hultsch, Hammer & Small (1993), Jarvick (1973), Norman, Kemper & Kynette (1992), Radcliffe (1985), and Sakato & Fendt (1981) suggest that the ability of the elderly to learn has been under-estimated, probably because of the negative stereotype of older adults. This is also supported by the research by Hagberg, Samuelsson, Lindberg, & Dehlin (1991) into the survival value of different personality traits amongst elderly people which also infers that those with unfortunate personality attributes withdraw from society, either by death or becoming institutionalised earlier than those who can cope. This is supported by Neugarten (1988) when she differentiated between the young-old and the old/old.

Education programmes specifically for older people have been outlined, or suggested, by Garland (1994), Norman *et al* (1992), Swindell (1990, 1991), and Thompson (1994). Sissons and Law (1983), while writing about younger adults, suggest that middle class "experts" do not know what is needed by minority groups, and this idea can also apply to young experts with regard to the elderly. Reasons for the provision of learning situations for the elderly have been proposed by Battersby (1982a), Glendenning & Battersby (1990), Heppner (1994a), Russell (1993), the Social Advisory Council (1984), Swindell (1990), Tobias (1991b), Trent & Trent (1977) and Withnall & Percy (1990). Krupp (1995), although her subject is adults in general, suggests aims for the educators of adults; by inference she includes educators of elderly adults.

Empirical studies are virtually non-existent in this country (Battersby, 1982b, 1985, and Tobias, 1991a) although Battersby, Heppner, and Tobias are New Zealand writers in the field. Reports have been produced by the Ageing and Education Working Party and the Social Advisory Council, organisations which were set up to advise the New Zealand government. The Massey University library (1996) has been unable to obtain information about reports in any New Zealand university concerning empirical research on this subject. Consequently there is an almost complete absence of real information amongst academics, teaching institutions, politicians and others about the learning, the learning requirements, and the learning patterns of New Zealand's elderly population.

The bibliography of Wither & Hodges (1987) suggests that several articles by Battersby were, at that time, the only real contribution to the study of educational gerontology in New Zealand. Although these were derived from basic research done overseas, Battersby (1982a, 1982b, 1985; Glendenning & Battersby, 1990), writes using information which he considers of importance and relevant to the New Zealand situation. For instance he quotes McClusky (1971) extensively when suggesting possible ways of satisfying coping, expressive, contributive anf influencing needs of the elderly perceived by McClusky. He cites Trent & Trent (1977) when listing difficulties which prevented universities and colleges in the United States of America from catering for the educational needs of the elderly.

It is possible, however, to glean some information from research into allied topics. For instance, the monumental work on *adult education* commissioned by the department of Education in 1978 and reported by Bird & Fenwick (1981) contains some useful insights into the educational participation, perceived requirements and practical difficulties of older adults. These are the bases of articles by Tobias (1991a, 1991b). Boshier (1970, 1971) included some details of elderly participation when summarising his findings about *adult education* classes conducted by three Wellington institutions. Tarling (1987), when outlining *continuing education* organised by Auckland University,

makes a few statements which are applicable to the elderly. The Social Advisory Council (1984) after due consideration of submissions from New Zealanders, in the main members of "care-giving" organisations, summarised their perceived needs of the elderly and included some references to learning and education.

Tobias (1991a) compares elderly and younger adults in six aspects using figures from Bird & Fenwick (!981). These data describe the rate of participation in courses over the previous year, the subjects taken, interest in learning shown both by participants and non-participants, the most common interests, reasons for participating in courses, and reasons for not taking part.

In his summary Tobias (1991a) states that the rate of participation in courses was lower for older adults than for younger adults. Crafts and hobbies provided the most desired courses for elderly people with expressive arts and general education following closely behind. Proportionately fewer old people were interested in educative programmes. The reasons given for wishing to participate differed quite markedly from the reasons given for actual participation. Many elderly people excused themselves from participation as they considered that they had insufficient spare time to take part in learning situations.

Tobias (1991a) continued that while one out of every three expressed interest in educational courses only one out of every eighteen actually took part during the previous year. Although he considered that the participation rate was too low he suggested that it is better than one would expect from the findings of research from overseas. Unfortunately no references about this research have been given so further investigation has not been undertaken!

It has been demonstrated in personality studies (Schaie & Parham, 1976; Schaie & Willis, 1991) that cohorts within the same society differ, probably as the result of different environmental pressures being exerted during childhood through to early adulthood. The older

adults who form the group described by Bird & Fenwick (1981), on which Tobias' work is based, now either form the cohorts of the 80+ year olds, or have died. Those who have joined the age group labelled "elderly" since that research belong to the cohorts who were born during the Depression or shortly thereafter and were children or adolescents during the Second World War.

Bird & Fenwick (1981) did not separate their respondents in the older cohorts from those younger, nor did they differentiate between the older cohorts, placing all those over either sixty, in some instances, or all those over fifty-five, in other cases, together. As a consequence the present cohorts of older people cannot be contrasted with members of their own cohorts who contributed to that research at a younger age. They can however be compared en masse with the older respondents of the 1979 research. That research is now nearly twenty years out of date so Tobias' (1991b) explanations, based on that work, for the disparities between younger and older adults (see below) may not now be relevant.

Nearly thirty years ago Boshier (1971) discovered that very few of the people whom he classified as elderly (those over fifty years of age) attended courses in the three Wellington educational institutions which were the foci of his research. The elderly proportions of the populations of the institutions were approximately 11%, 12% and 22% when the proportion of elderly in Wellington was 28%. Contrary to conclusions indicated by overseas research, which have been questioned by Withnall & Percy (1990), and mentioned but not identified by both Boshier and Withnall & Percy, he discovered that the educational level of those taking part in his studies showed little relationship to their participation in courses. This relationship can therefore be described as a "myth" (Hughes & Tight, 1995).

Many younger adults do not seem to realise that the elderly can still think and decide matters for themselves (Solomon, 1982). Hence they assume the task of advancing theories concerning the needs of the elderly and offer methods of fulfilling those needs. For instance

Phillipson (1983) supports the idea that courses for the aged should help them to care for themselves through confronting the newly created problems faced by the modern population. Thompson (1994) suggests that although modern technology may be intimidating everyone should keep up-to-date. Tobias (1991b), having discussed reasons for differences noted between older and younger adults, suggests educational means for eliminating the discrepancies between the two groups. McCallum (1986) explains the difficulties faced in the transition from middle age to old age.

Only Withnall & Percy (1990, 1994) in Britain, and Roth (1975) in New Zealand, have considered that the elderly would be able to organise, or adapt, educational offerings to suit themselves. The former found that their sample (Withnall & Percy, 1990) were able to overcome any lack in basic skills through their self-built social networks. They suggest that aid should be offered, not merely to older adults but, to people of all ages who need to seek help with their learning. Roth when a retiree, helped to organise learning situations for the elderly but soon found that younger people also wished to take part.

Glendenning & Battersby (1990) suggest that in the United States of America educational programmes are being imposed on the elderly by "big business" with little perceivable benefit to any but the industry itself. They mention that a similar situation is steadily developing in Britain, Canada and Australia. The proposals of Roth (1975) and Radcliffe (1985) which include the idea of older persons being parties to any decision making (see also Colley, 1996; Heppner, 1994a, 1994b; and Koopman-Boyden, 1988) would appear to be more genuine.

In New Zealand, so far, the position seems to be quite dissimilar to that pertaining overseas. Provision of education or training exists within the framework of existing courses and facilities which are available to all adults. New Zealand universities, while not providing special courses for older people, do not provide any impediment to their further formal education. Similar positions are held by polytechnics and W.E.A. evening classes. This mixing of the age groups influences all groups in

accepting and understanding other generations (Brubaker & Powers, 1976 and inferred in Boshier, 1980). Consequently the chance of intergenerational disputes arising is lessened. On the other hand Auckland University is providing courses for graduates who have reached retiring age and also for their contemporaries who wish to complete degrees that were begun when they were younger (Tarling, 1987). Other organisations such as the University of the Third Age (U3A) are said to provide stimuli for the elderly but, when numbers are investigated do not seem well patronised.

As the Ageing & Education Working Party (1987, p.27) state "In depth information about older people in New Zealand is currently not available ... and yet it is this group of the population that is expanding most rapidly and which will demand increasing attention from policy-makers". The situation in New Zealand, then, is simply that little information is available about educational gerontology. Statements about the learning of elderly people in this country are not grounded on reliable information derived in the New Zealand context although studies from overseas (Denney, Tozier, & Schlotthauer, 1992; Eisdorfer, 1967; Granick & Friedman, 1973; Hultsch, Hammer & Small; 1993; Sakato & Fendt, 1981) indicate that there is no deterioration in the ability to learn in the elderly nor a decline in their measurable intelligence.

Because of the paucity of evidence, questions such as whether there are links between social class, income, former education, age, and present educational requirements of the elderly cannot be answered except from a philosophic stance. Any ideas that are held concerning elderly interest in learning, the need for special programmes and teaching methods, and impediments to their participation in education are based on beliefs rather than evidence. The few dependable facts about this age group in New Zealand are those derived from the five yearly census (Department of Statistics, 1992; Statistics New Zealand, 1995, 1996) which gives national population figures by age and gender, and district population figures by grouped age, for instance those over sixty years of age, and gender. Other information such as tenure of housing does not separate age groups.

Purpose

The aim of this thesis is to report on information gained from a group of New Zealand adults sixty years and older about their present and recent learning activities, their backgrounds, and relationships between the two; to ascertain how such information supports the views of some New Zealand writers; and to compare these findings with reported results from overseas.

Research questions

The research questions are:

1) What purposes are served by the participation of older adults in learning activities and how are they achieved?

2) Are the following propositions of Tobias (1991b) supported by evidence:

i) The lower course participation rate of older adults, compared with younger adults, may have been caused by a lack of earlier educational opportunity;

ii) Being retired older adults have no pressure to improve their job qualifications. This could be a reason for low course participation rates amongst the elderly;

iii) Aging processes could have some effect in preventing older people from participating in courses.

3) Are income levels, previous educational achievements, former employment, gender, or age indicators of retirees' approaches to learning?

4) Do older adults have learning needs that are not met by existing organisations?

5) What implications for the provision of educational facilities and courses for older adults are suggested by the findings?

3 - Method

Many people consider that a bowling club is a "holding paddock" where the elderly can occupy themselves while waiting to die. This stereotype is scathingly used by Roth (1975) when promoting his *Knowledge in Retirement* programme, so where better to obtain information about how a number of elderly people fill in their time and, in particular, what learning they do.

The specific bowling club was selected because the writer is a well-known member and in the same age group. It was thought that because of these attributes and its proximity to the writer's home a higher and more accurate response rate would result than if another organisation were to be used. Furthermore, it was thought that communication between the sample and researcher would be simpler.

The amalgamation process between women's and men's clubs currently taking place throughout New Zealand had been completed, earlier than most, so there would be little difficulty in obtaining respondents from both sexes. Within a district which has a total population of 984 people of the appropriate age (Department of Statistics, 1992) this club has a membership of 241 men and women. Unfortunately for this research no records of the age of members is kept so the actual number of those sixty years of age and over is not known. However ninety-three people took questionnaire forms.

Reservations

It was considered that such a sample would not necessarily be representative of the population over fifty-nine of New Zealand:

> Although it was known that some members had had heart problems, others slight strokes, and several suffered from some form of disability gained from ageing or from youthful sports injuries or disease (such as poliomyelitis), it was thought that they would tend to be more active physically than many people of the same age groups;

Because there was no home for the elderly, or retirement village, in the census district the sample would include few, if any, representatives of an important group of elderly people;

A very large number had come to this area after retirement and hence could be thought to be at least sufficiently wealthy to be able to set up a new home;

The majority of members were men and there would probably be a gender imbalance opposite to the national imbalance.

Although the sample seemed appropriate considering the stereotype it was decided to obtain a further sample, within the same district, of people sixty years of age and over. This would permit comparisons between the bowling club members and those who were not.

The district

The facilities in a district have an effect on the variety of opportunities accessible to the elderly so a description of the region is necessary.

The bowling club is in one census district with two further clubs in contiguous census areas. Forty years ago the total area was quite different being mainly farmland, dunes and beach with a few houses and shops, and numerous baches. Today it is a dormitory suburb for the nearby township and a city which is about half an hour away by car or fifty minutes by rail. The population is no longer chiefly transient.

Like many other seaside resorts with a pleasant climate and good amenities this has become a target of retirees. In 1991 the total population of 3,672 included 984 people over 59 - 26.8% of the population compared with 15.4% of the total New Zealand population.

Figure one shows the difference between the district and national age distributions. From age fifty-nine up the district proportions are considerably higher than national figures. However, apart from the

twenty to twenty-nine group the proportions of those at each interval under fifty are very similar to the national figures.

Figure 1 The difference between national and district age distributions according to the 1991 census (Dept. of Statistics, 1992)

This locality has a centralised shopping area which includes most of the common stores and a small supermarket. At one time BNZ and Postbank had branches here but, due to restructuring, they have been closed down and their nearest branches are in the nearby township. Because of this it is probable that most shopping is done there rather than locally. Included, now, are dentists' rooms, a medical centre (which contains the offices of several general practitioners and three visiting specialists), a physiotherapist, solicitor, accountant, a part-time police station and a veterinary clinic. For a small centre it is notable in having three realtor offices, five licensed restaurants, a tavern (with its restaurant) and a wholesale bottle store.

Public amenities (that is either directly owned by the public or on public land) include a seaside park with a small railway, a swimming pool, and the bowling club, a cricket/association football ground with floodlighting and clubrooms, a public hall, an art and craft centre, five churches, Lifeline Trust (an organisation for the care of the mentally disadvantaged), two child care organisations, a free kindergarten, a full primary school and a large secondary school. Within a short

distance, but outside the area being surveyed, is a public library maintained by the local Council, a polytech, a hospital with geriatric facilities, several old people's homes, a recently completed retirement village, and the other facilities one would expect to find in a large town.

A bus service connects the various parts of this district with the neighbouring town centre, the railway station and other adjoining suburbs. The bus timetable, like that of the railway, provides for one departure per hour. However, two taxi firms, one catering specially for older people, provide a faster, more convenient service for those who can afford it. All the same it would appear that the majority of people provide their own transport.

Cultural, social, physical and educational activities are provided by some of the organisations already listed and by numerous others based both within and outside this district.

The questionnaire

In order to facilitate the gathering of data a questionnaire appeared to be the most appropriate means. In creating the questionnaire form the following factors were considered important:

i) to obtain maximum cooperation the questionnaire needed to be kept as brief as possible;

ii) to obtain answers which were not influenced by the questionnaire, where possible respondents should be left to provide their own answers;

iii) it should be obvious that the questions were related to the subject of the questionnaire, to gain information and not containing implications of value judgements.

Two groups, the first of two people and the second of four people, of the appropriate age were asked to complete the questionnaire and provide a critique of it. After the first group had offered suggestions and criticisms, some of the questions, and the form, were amended. The second group used the amended form and also offered suggestions and criticisms which resulted in further alterations. Appendix One is a copy of the final form.

Administration

On several bowling days, bowling club members of the appropriate age were invited to take part in this survey. Forms were taken home, completed, sealed in an envelope and returned to the club.

Door to door canvassing in a randomly selected street was used to discover where people over 59 lived. They were also invited to take part. Forms, within envelopes, were collected from respondents a few days later.

Unsolicited information

Several respondents who showed great interest in the project proffered further information about themselves which, with their agreement, was noted. Although the accumulation of such data was not included in the proposed procedures such data illustrated aspects of the study which otherwise were difficult to understand.

Processing

When they were returned the forms of both groups were numbered in the sequence in which they were opened to facilitate any later reference.

Because the number of completed forms was not as high as had been hoped for in either sample (a total of sixty-nine from approximately a hundred forms taken) it was decided to combine the two samples.

Variables such as income, educational levels and learning were coded, tabulated and put together to form groups. Relevant details for respondents who had taken part in formal courses or informal courses were expanded.

Statistical analyses which have to do with income, educational background, age and present learning were carried out. Because the data were considered to be nominal data the chi square test was used to compare age and learning, gender and learning, background education and learning, prior occupation and learning, war service and learning, library use and learning, associations and learning, and administration and learning. Income data were ordinal so although Income and learning were tested using the chi square test they were further investigated statistically using medians and inter-quartile ranges. The data referring to prior occupations could also be considered ordinal so were investigated using both the chi-square test and Spearman's rank order correlation.

4 - Results

This section reports answers to the questions, compares the responses with the results of earlier work, where possible compares this sample's background with either the elderly population at large or the results of the work of Bird & Fenwick (1981), and is followed by a statistical analysis of the results. Appendix Two provides two summaries of the responses - the first by gender, the second by age.

Several questions which could perhaps have been more efficiently organised by being multi-choice, as in the 1979 survey reported by Bird & Fenwick (1981), were left open-ended. It was thought that by giving a definite range of answers respondents might seize upon the ones they felt best fitted the researcher's programme rather than responding with more relevance to their own position. In practice these were the questions which were most often not answered.

Gender and age range

The survey's first two questions concerned the sex and age of the respondents.

Age was divided into seven groups. Up to age 90 each group has a range of five years. For ease of reference the groups were numbered consecutively, from those sixty to sixty-four years of age who were designated group one up to group seven which comprised the male who was over eighty-nine years old. Since Statistics New Zealand does not differentiate between groups higher than eighty years of age groups 5, 6 and 7 were combined. Table 1 shows the numbers in each of the revised age groups.

Table 1

Numbers of respondents at each age level by gender

Gender	(1) 60-64	(2) 65-69	(3) 70-74	(4) 75-79	(5) 80+
Men	8	15	12	4	4
Women	11	8	6	1	0

In the sample the proportion of men to women is quite different from district and national figures as can be seen in Table 2. In the national over-sixty age group women outnumber men (Department of Statistics, 1992). The sample reflects the proportions of men and women in the membership of the bowling club.

Table 2

A comparison of the gender ratio for New Zealand, the census district, the sample and the bowling club (District and national figures from Department of Statistics, 1992)

Gender	National	District	Sample	Club
Women	55%	57%	38%	37%
Men	45%	43%	62%	63%

Figure 2 compares percentages of men in the sample with percentages of the national population of men over 59, and similarly compares percentages of women in the sample with the national population of women over 59.

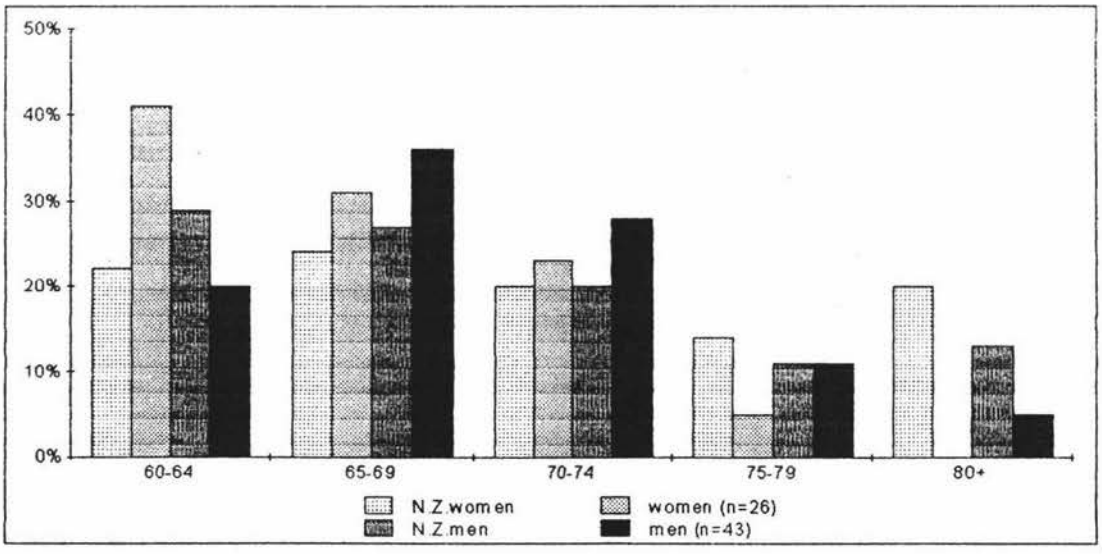


Figure 2. Sample's ages and gender compared with national figures (N.Z. figures from Statistics New Zealand, 1996)

Comparing the sample's ages with national age ranges indicates that the sample includes a higher proportion of women in the younger group, from 60 to 74, while the National figures show a larger ratio of women in the older group, 74+.

Marital status

The questionnaire gave respondents four options for marital status - married or remarried, widowed, separated or divorced, and never married. The few members of the bowling club who are known to have never married did not take part in the investigation.

The large majority of respondents are married (Table 3). It is impossible to compare the marital and financial status of the sample with the larger community of older people as the Department of Statistics (1992) and Statistics New Zealand (1996) do not separate the necessary figures for those over fifty-nine from the figures for the total population.

Table 3

Marital status of women and men of the sample

Status	Women	Men
Now married	81%	79%
Widowed	19%	7%
Separated or divorced	0	9%
No answer	0	5%

The percentage of women respondents who are widowed is greater than the percentage of widowed men. This can be accounted for partly by the difference in life expectancies of the two genders and partly through the usual social practice of husbands being older than wives.

Housing

All of the sample owned their own homes except for three people who rented their dwellings and one who failed to answer. These figures can be compared with the total district tenure for private dwellings (Table 4). Despite their lower incomes, as shown below, they are more likely to own their homes than are the younger members of the community.

Although it is known that some of the older people in the community live with their offspring it would appear that such does not apply to these respondents.

Table 4

Tenure of housing (district figures from Department of Statistics, 1992.

Tenure	District	Sample
Owned	88%	94%
Rented	9%	4%
Rent free	2%	0
Unspecified	1%	1%

Of the three respondents who rent their homes two are women younger than seventy and one is a man in the seventy to seventy-four age group. One of the women is a widow.

Income

Figure 3 shows the distribution of income for men and women separately. One of the men in the $10000-$19999 range is working part time, while two of the men in the $40000-$50000 bracket still work.

It is worth noting that 88% of the women and 52% of the men (65% of the total sample) receive less than $20000 per year; and that 54% of the

women and 15% of the men (29% of the total sample) receive less than $10000 per year. This indicates that 29% of the sample have no other income than that provided by national superannuation (see Table 5.)

Because the majority of the sample is married (Table 2) the total income for a household will be more. Respondents were asked for their own gross income - not the amount coming into the house.

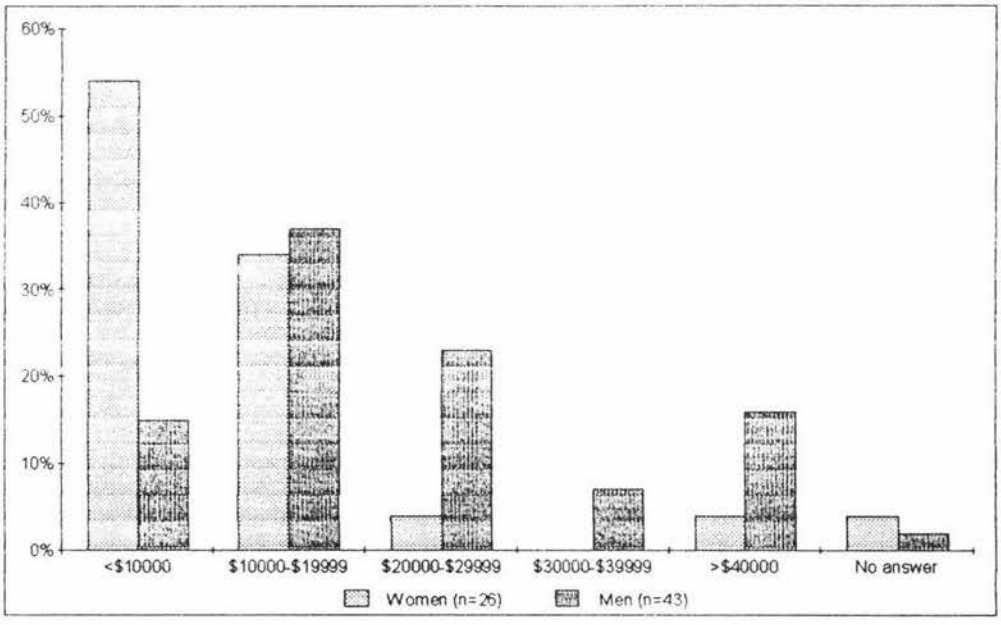


Figure 3. A comparison of incomes of women (n = 26) and men (n = 43) of the sample showing the percentage of each gender in each income level.

Table 5 shows gross New Zealand Superannuation figures as at June, 1997. It can be seen by comparing these figures with those displayed in Figure 3 that some respondents, in particular widows, widowers and divorced or separated people, will be at the lower end of the second income group ($10000-$19999). It can also be seen that a married superannuitant who earns an extra $62 a fortnight will have an income boosted to slightly in excess of $10000. Unfortunately the intervals used in the question were too large. Smaller intervals would have shown which respondents who fall into the second income group are actually at the lower end of that range.

Table 5

National superannuation before tax. (Figures from Income Support, June 1997.)

Status	Fortnightly	Annual
Single alone	$417.58	$10,887
Single sharing	$385.46	$10,049
Married person	$321.22	$8,369
Married couple	$642.22	$16,738

Occupations

Table 6 shows the twenty-four types of occupation, or combination of occupations, which were noted. An extremely wide range is represented.

Members of parliament and professionals such as lawyers, medical practitioners and clergy, are notable by their absence. It would seem that, in this group, only three married women did not take up some paid occupation either while raising a family or later on.

Table 6

Occupations of sample (n = 68).

Occupation	Number	Occupation	Number
Accounting & Banking	6	Police	1
Administration	3	Farming / Police	2
Aviation	3	Public Service	4
Catering	1	Railways	2
Clerical	6	Retailing	6
Farming	2	Secretarial	2
Housewife	3	Teaching	3
Housewife/Catering	1	Technician	2
Housewife/Clerical	2	Trades	10
Housewife/Retailing	1	Trades/Labouring	2
Housewife/Secretarial	2	Typing	1
Labouring	2	Warehouse	1

Although this sample belongs to the generations in which the normal practice was for the husband to be the bread-winner while the wife remained at home, only nine of the twenty-six women noted that they were at some time mainly concerned with housework or child-rearing.

War Service

Thirteen male, but no female, respondents, 72% of their age group, were in the armed services during the Second World War.

Levels of education

Levels of education were coded as follows:

i) Proficiency, which was abolished in 1936 (Openshaw, Lee & Lee, 1993) and replaced by the Primary School Certificate; both were obtained at the conclusion of primary schooling and provided free secondary education.

ii) Public Service Entrance, School Certificate, and a trade certificate; the first was abolished in 1932 and replaced in 1934 by School Certificate which did not become accepted until 1946 (Openshaw, *et al,* 1993) when the youngest members of the sample were at school. A trade certificate was awarded at the end of a three or five year apprenticeship so could be considered equivalent to an exam that required two or three years of secondary schooling.

iii) Matriculation or University Entrance and an advanced trade certificate; the first two are synonymous. An advanced trade certificate required further study and practice after the receipt of a trade certificate so could be looked upon as equivalent to an examination that followed school certificate.

iv) Undergraduate and professional qualifications (but not a degree).

v) Bachelor's degree or post-graduate.

Honorary qualifications, membership of various associations and colleges were not considered to be educational qualifications unless an examination was involved. Obviously examination passes do not necessarily indicate an actual level of education but in this context, in order to maintain consistency, they were used as a criterion.

In the social sciences it is usual to measure education by the years of education, or by the level that has been completed - primary, secondary, or tertiary. However for New Zealanders in these cohorts the educational qualifications listed had more meaning. It is important to note that, in their turn, Proficiency, Public Service Entrance, Matriculation and School Certificate qualifications were the terminal school qualifications and considered to be the markers of an educated person (Openshaw *et al*, 1993) equipped for all white collar occupations except those which required further professional training. The sixth and upper-sixth forms of secondary schools prepared students for university which was then accessible to a small proportion of the population. Rather than assume that this sample had poor to medium educational levels by today's standards, it may be more accurate to note that its wide range is an indication that, by the standards of their day, it is a reasonably well-educated group.

Figure 4, which shows the educational levels for each age group by gender, further illustrates differences in the educational expectations for boys and girls which were representative of the levels considered appropriate for each sex when members of these cohorts were at school.

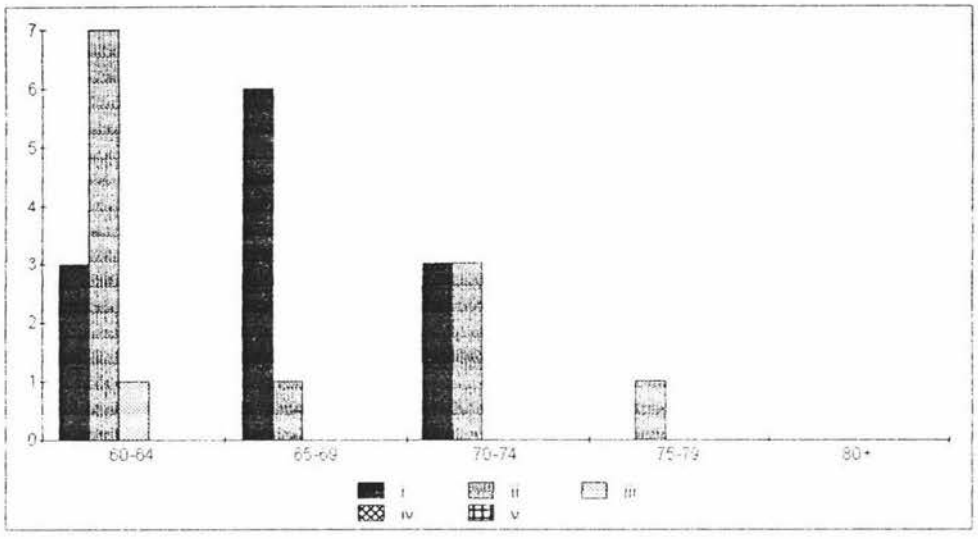


Figure 4 a) The number of women (n = 25) with differing educational qualifications in each age group.

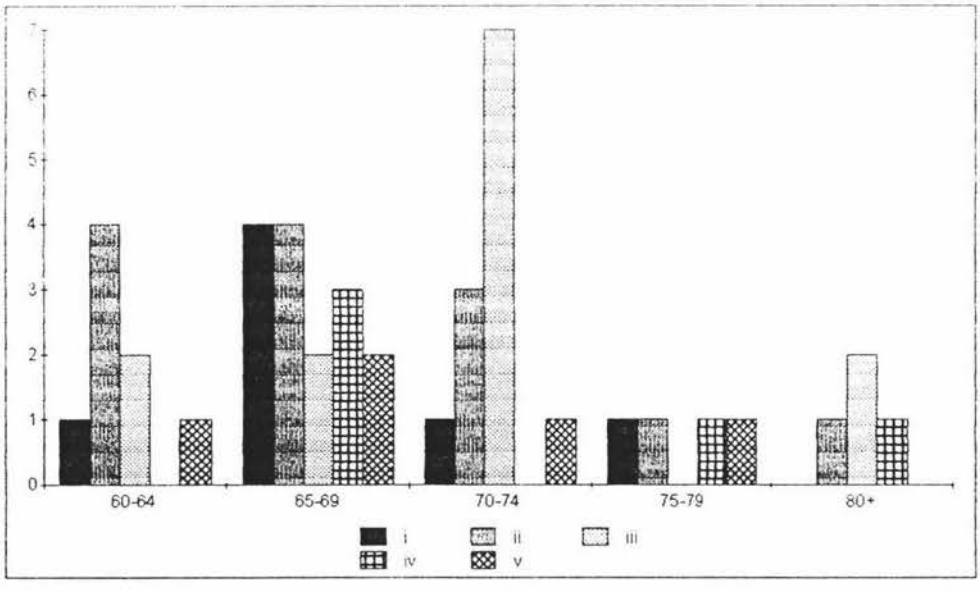


Figure 4 b) The number of men (n = 43) with differing educational qualifications in each age group.

Table 7 shows the number of women and men respondents placed in each qualification group. It also demonstrates the noticeable disparity of educational qualifications between men and women.

Table 7

Educational qualifications of the sample shown by gender

Gender	(i)	(ii)	(iii)	(iv)	(v)	No answer
Women	12	12	1	0	0	1
Men	7	13	13	5	5	0

Membership of various societies and clubs

Two questions pertain to membership of groups - one to service, social, and cultural societies and one to pastimes and sports clubs. Table 8 lists the thirty-eight organisations which were given in answer to the first question, and Table 9 lists the twenty-four activities given in answer to the second.

Table 8

Service and social groups and numbers of members from the sample

Little learning	No.	Considerable learning	No.
Age Concern	2	Art Society	3
Blind Foundation	1	Birthright	1
Cancer Society	5	C.W.I.	1
Church	7	Dog Obedience	1
Community Service	1	Embroidery	1
Early Settlers' Association	1	Genealogy	1
Friendship Force	1	Grey Power	1
Kapiti Carers	2	Historical Society	1
Lodge	3	Home & Ground Care	2
Meals-on-wheels	4	Homebrewing Club	1
Old Students	1	Horticulture	4
R.S.A.	4	Lions	7
St. Vincent de Paul	1	Music Society	1
Save the Children	1	Probus	4
S.P.C.A.	1	Professional Organisation	4
Senior Citizens	2	Rose society	9
Sixties Up	2	Rotary	2
Special Needs Children	1	Trust	1
Widows and Widowers	1	U3A	3
No answer	7	No affiliations	20

Note: Although thirteen respondents were in the armed forces during the Second World War only two of them stated that they were members of the R.S.A.. The other two who claimed this affiliation were too young to serve in that war.

The thirty-eight societies were divided into two categories - those that are service or social groups with, perhaps, a small learning component, and those which have a considerable emphasis on learning. This division is shown in Table 8 together with the number of individuals who said that they belong to each organisation. Twenty-seven respondents claimed no affiliation or did not answer the question.

Table 9 shows the wide range of sports and pastimes that this small group is involved in. In some of these, such as rugby, an active past has developed into an administrative present. Many of the respondents take administrative roles in their activities. Seven are administrators in the social and service groups only, twenty-five in sports clubs only, while eight are administrators in both categories. In total forty people, or 58% of the sample, take part in administration.

Table 9

Sports and pastimes with numbers of participants from the sample involved in each

Activity	No.	Activity	No.
Aerobics	1	Mah jong	1
Aquarobics	1	Petanque	2
Badminton	2	Rugby	1
Bowls	54	Squash	1
Bridge	3	Swimming	1
Caravan club	2	Table tennis	1
Computer	1	Tai chie	1
Country dancing	1	Tramping	3
Filming	1	Ulysses club	1
Flying	1	Umpiring	1
Golf	20	Walking	2
Gymnastics	1	Nil	2
Indoor bowls	22	No answer	2

The numbers of activities each respondent is engaged in are shown in Table 10. When societies or sports are looked at separately 20% of the respondents are seen to be involved in three or more societies and 20% take part in three or more sports. When each individual's participation in societies and sports are added together 54% of the respondents are involved in three or more societies and sports. Two of the respondents take no part in sport and have no other association. These are a married couple. The man is an invalid and his wife has little time for outside activities because of the care he needs.

Table 10

Number of group memberships per respondent, number of sports per respondent, and total number of activities (sports plus groups) per respondent.

Number of activities	1	2	3	4	5	6	7	8	Nil
Groups	20	9	8	4	0	2	0	0	20
Sports	28	25	9	4	1	0	0	0	2
Groups & sports	11	18	12	9	7	4	3	2	2

Library and reading

Library use bears little relationship to the sample's reading habits. Everyone in the sample reads something whether they use the library frequently or not at all. In fact the two women with the widest range of regular reading say that they never use the library!

Table 11 summarises the responses to the questions regarding library use and reading habits. Sixty-five sample members read at least one of the newspapers (the Dominion, the Evening Post, a Sunday paper or the three free weekly papers) on a regular basis. Of the four people who state that they do not regularly read the newspaper, one reads fiction, one a digest, one non-fiction, and the other magazines and fiction. It will be noted that two of these people are amongst those

who say that they are regular library users. However, every respondent reads something on a regular basis and probably other materials less often.

Table 11

Respondents' patterns of library usage with their regular reading interests

Use library	Number	Paper	Mags.	Digest	Stories	Fact	Fiction
Frequently	20	19	11	3	3	9	13
Often	13	12	10	4	1	9	9
Seldom	20	21	13	7	9	7	10
Never	16	13	11	4	3	8	5
Totals	69	65	45	18	16	33	37

Formal courses

Data on which Tobias (1991a, 1991b) based his accounting for differences between younger and older adults in course participation was derived from Bird & Fenwick (1981) who reported that, in their nationwide survey 11.6% participated in a course during the previous year. Although 578 elderly people (over the age of sixty-five) took part in the survey the number reported to have responded to various questions vary from eleven to 578. This present survey requested participants to note any courses in which they had taken part since their sixtieth birthday together with their approximate age at the time. These courses have been labelled "formal courses" to distinguish them from informal learning situations, which may take the form of courses not under the aegis of recognised teaching establishments.

Nine respondents (or 13% of the total), reported that they had taken courses during the past twelve months. This figure includes eight respondents (16% of their age group) who were aged 65 or over.

Nineteen (or 27.5% of the total sample) had taken part in at least thirty-nine courses since their sixtieth birthday. There is difficulty in gaining an accurate figure as in some cases the information is not sufficiently specific. For example one respondent stated that by taking ten papers she had obtained community services certificates from a polytechnic. This was conservatively counted as one course.

Table 12 shows how many formal courses individuals have taken since their sixtieth birthdays. Of the three who have taken four or more courses one has taken five, one seven, and the third eight. Table 12 also shows the percentage of each age group who took part in courses.

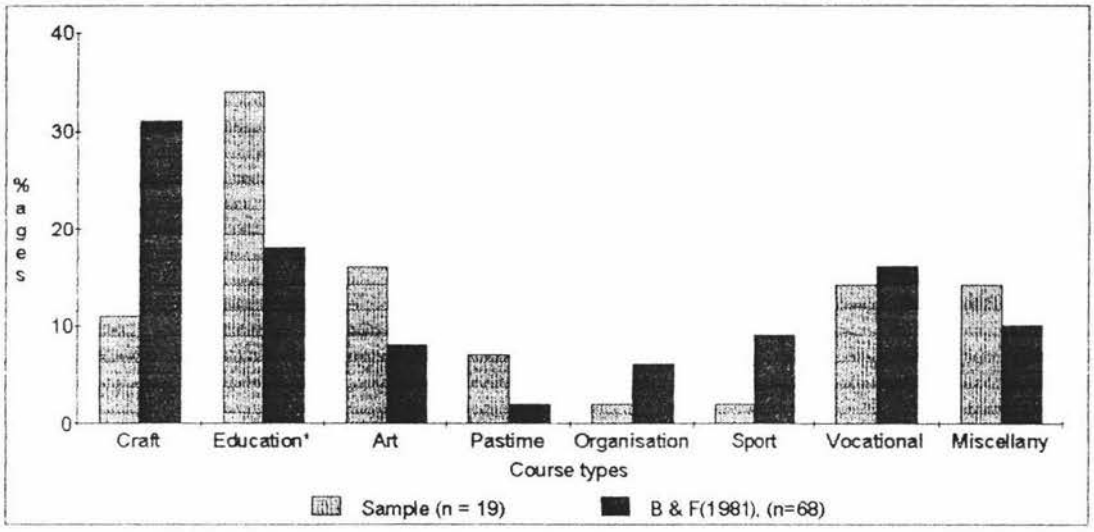
Table 12

Number of formal courses per person by age

	No. of courses				% of the
Age	1	2	3	>3	age group
60-64	2	2	0	2	31.60%
65-69	3	3	1	1	34.80%
70-74	2	0	0	0	11.10%
75-79	1	1	0	0	40%
80+	0	1	0	0	50%

(The courses for each of the nineteen respondents who have taken part in formal courses are shown in detail in Table 17.)

Figure 5 summarises the types of course taken compared with the figures from Bird & Fenwick (1981). The proportions of those engaged in craft and education courses differ quite considerably (by more than ten percent) from those in the study by Bird & Fenwick (1981). Otherwise subject participation is remarkably similar.



* Note: 'Education' refers to courses which have educational value, such as *English literature*, but do not fit into any other category. A complete list of subjects fitting the above categories is in Bird & Fenwick (1981, Appendix 5, pp. 153-163).

Figure 5. A comparison of the popularity of types of courses taken by respondents reported by Bird & Fenwick (1981) (n = 68) and those taken by sample respondents (n = 19).

Reasons for and against course participation

The reasons given against and for taking part in courses are summarised in Tables 13 and 14.

In this study three reasons predominate - lack of time, lack of interest and failure to answer account for 72% of the responses. In the 1981 report these account for only 25%. The samples of 74 for participating, and of 79 for not participating, used by Bird & Fenwick (1981) are national samples and quite large in comparison with the samples of 19 and 50 respectively used in this present research.

Table 13

A comparison between Bird & Fenwick's (1981) reasons for not attending courses and those of the present sample.

Reasons against courses	B & F %	Sample %
Lack of time	25	26
Clash with other activities	10	
No classes available	9	
Unaffordable	4	
Only recent interest	4	8
No knowledge of courses	2	2
Lack energy - had enough	5	4
Family commitments	4	6
Distance to travel	5	
Personal reasons	2	
Health	9	
Lack opportuntiy	5	
Transport difficulties	6	
Lack of facilities	2	
Too old	6	2
Other reasons	2	
Not interested		22
Other learning sources		2
Inconvenient times		4
Failed to answer	0	24

There are several other major differences from the first study. Transport and travel problems, lack of facilities and opportunities, and poor health were not noted as problems for the sample of the present study. "Inconvenient times" includes one woman who has expressed fear, and another discomfort, at going out in the evening to attend courses. This was not mentioned in the 1981 report.

Some of those who have taken courses did not answer and have been recorded thus. Other participants while indicating that they have no desire, or need, to take further courses have not explained why they took courses in the past. In some instances where reasons have not

been given it is possible to make assumptions by observing any relationship of courses to present interests. The organisations to which these respondents belong, and statements they have made, provide the evidence required for this purpose.

Table 14

A comparison of reasons given for taking courses between Bird & Fenwick's (1981) work (n = 74) and the present study (n = 19)

Reasons for courses	B & F %	Sample %
Improve education	20	22
Enjoyment	27	26
Interest outside home	15	5
Improve home life	9	0
Special interest	16	11
Contribute to community	9	5
Meet others	4	0
Can't stop learning formally	0	5
Failed to answer	0	26

Examples of answers to question 14 concerning reasons for and against participating in courses are:

> "I am too busy with other activities, e.g. bowls, gardening, family" (man, 60-64);

> "I have not had the opportunity for higher education but am interested in learning for enjoyment without exam pressure" (woman, 60-64);

> "I was always used to continuous learning and since retiring found myself getting rusty" (man, 65-69);

"At first to 'hone' skills for my own benefit - later to assist in my voluntary work- and now to gain an educational qualification which I did not have the opportunity to do when younger" (woman, 65-69);

"Courses are not necessary for a happy and useful retirement" (man, 70-74);

"Community service and other types of learning take up too much time" (woman, 70-74);

"I decided to give up courses and enjoy life and travel. I'm still learning however" (woman, 75-79);

"I do not see the need to pay for courses - libraries, friends and colleagues provide me with all the information I have needed" (male graduate, 75-79).

Informal learning

There are ten people in the sample who have not taken advantage of any informal learning situations since turning sixty, and twenty-five who failed to respond to the question. Of the thirty-three who state they have used this form of learning, twenty record that they had taken part in one, eleven in two, one in four and one in six such situations. Table 15 is a list of the various types of situations with the numbers involved in them.

Table 15

Numbers of respondents involved in informal learning situations

Learning situation	No.
Bowls coaching	20
Indoor bowls coaching	2
Golf coaching	1
Umpire tuition	1
Bridge	4
Crafts	14
Painting	1
Computer skills	3
Work-related training	2
Horticulture	1
Vehicle maintenance	1
Travel	1
Television workshop	1

Further informal learning will have taken place in the service and social groups with a considerable learning component, listed in Table 8, and much of the reading, particularly non-fiction, listed in Table 11.

Further comments

Respondents were asked to write any further comments they might have. Ten people did. Their comments are summarised:

1. Six people suggest that active learning and/or physical activity are needed by older people;

2. Two state that many adults over 59 are still in full or part-time employment which, they suggest, interferes with learning programmes;

3. One points out the value of internet for people over 55;

4. The other argues that in a small community there is less likelihood of older people being as lonely as they would in a city like Auckland and he suggests ways of overcoming their loneliness.

Verbal additions

A male, in the 75-79 age group, has, since the questionnaire was answered, completed a polytech Diploma of Turf Culture. He has stated that his reason for taking this course was to complete an interest which was aroused when he was appointed greens supervisor. He has no intention of taking further courses apart from a brief introduction to computers.

A male, in the 65-69 age group, is mid-way through a sports turf management course. Since retirement he has taken on the task of green-keeping and has stated that he felt at a disadvantage when speaking to many Bowling Club members about bowling greens.

A male, in the 80-84 age group, stated that a few years ago (the actual interval was not given) he took a university extra-mural hospital course and completed accountancy papers so that he could assist the elderly and take an active part in various organisations such as Lions and Probus.

Learning categories

To enable comparisons between background factors and learning to be made it is thought necessary to posit a hierarchy of learning activities.

Tobias (1991a) uses two categories - those who have been involved in courses during the past year and those who have not. In this study, Tobias' first category has been widened to include all those who have been involved in courses since age sixty. It has also been felt necessary

to sub-divide the large group of people who have not been involved in formal courses since age sixty so a three division classification of all respondents has been adopted.

This study shows that two types of course exist - formal courses which are the type described by Tobias (1991a) and informal learning situations. Using the Tobias (1991a) classification and considering that greater discipline is required by those taking part in the formal type of course all those involved in such courses were assumed to be at one end of a learning continuum. Those who were not involved with formal courses but were participating actively in learning situations were placed in a middle group. Respondents who said that they were not involved in either of those active forms of learning were placed in a third group. Thus the sample of sixty-nine was divided into three groups as shown in Table 16.

Table 16

Numbers of individuals in each learning group

Groups	1 (Formal)	2 (Informal)	3 (None)
Numbers	19	23	27

Courses

Since turning sixty years of age sixty-one percent of the sample have taken advantage of some form of organised learning through formal or informal courses, or both. Overseas experience in providing learning opportunities for the elderly is outlined by Swindell (1990,1991) and Thompson (1994) and is also mentioned in articles by Garland (1994) and Norman *et al.* (1992). Initiatives in assisting New Zealand elderly in self-organised learning (U3A) are discussed by Heppner (1994b) and, for the well-off elderly, set out in a prospectus by Colley (1996,1997). The data provided by this sample indicates the variety and depth of

educational opportunities that are available to, and used by, the elderly in this district.

Formal courses

Courses, which are available for all adults including the elderly in this area, are provided by secondary schools and other teaching organisations such as community colleges, polytechnics, universities, church groups, the Central Institute of Technology (CIT), correspondence school, and various privately controlled training schools. They are advertised regularly in newspapers, for example *Tertiary Education - January update* in the Evening Post of Thursday, 30th January, 1997, and in circulars.

Although the respondents in this study who had participated in formal courses used a wide range of institutions (Table 17) not all of the above institutions were used. One participant had private lessons. Several polytechs were involved - Whitiera, C.I.T., Wellington and Palmerston North. Two local secondary schools provided many evening and day classes which were promoted under the auspices of the Workers' Educational Association (WEA). University continuing education was supplied by Victoria University and other courses were provided extramurally by Massey University.

Eleven of the respondents have been involved in formal courses which bear a direct relationship to the associations to which they belong. Examples are: a gardening course and the rose society; oil painting and an art society; life experiences, writing (separate courses) and family interests; computer studies and secretarial work; sports turf management and greenkeeping.

Three of the respondents state that they are taking courses for the sake of learning. Two women between 60 and 64 have said that they would have liked to have furthered their education when they were younger but lacked the opportunity. They are now making up for lost time.

The other, a male graduate between 65 and 69, suggests that taking courses has become a habit.

Table 17

Organisations providing formal courses, courses taken and numbers of respondents involved in each course.

Organisation	Courses taken	No. involved
Private tutor	Oil painting	1
Whitiera Polytech	Gardening	2
	Real estate salesman	1
Wellington Polytech	Community services	1
CIT	Diploma turf culture	1
Palm.Nth.Polytech	Sports turf management	1
Night classes	Bone carving	1
	Computer studies	3
	Embroidery	1
	Glass working	1
	Literature	1
	Music	1
	Natural therapies	1
	Painting	1
	Pattern-making	1
	Photography	1
	Tailoring	1
	Wood turning	1
	Writing	1
Massey University	Degree studies	1
	Hospital studies	1
Victoria University	Accountancy	1
	Art appreciation	1
	Life experiences	1
	Oral history	1
	Religion	1
	Surrealism	1
U3A	Unspecified	2

Note. Several respondents have taken more than one course, some through different institutions. Total number of courses taken is thirty-two; total number of those taking courses is nineteen.

Of the twenty-six women in the sample nine, or 35%, have been involved with courses. This compares with ten of the forty-three men, or 23%. Table 18 shows the composition of course participants by gender and by age. Note that the only woman over 75 years of age was involved in courses.

Table 18

The number of women (n = 9) and men (n = 10) of each age level who are, or have been, involved in formal courses.

Age group	Women	Men
60-64	5	1
65-69	3	5
70-74	0	2
75+	1	2

Informal learning situations

The term "informal learning" is used here to describe the learning that is the result of a conscious effort to learn, probably from a course or the use of a person with expertise, but not through a recognised fee-charging educational organisation. It does not include those educational environments provided by organisations such as Probus where social interaction is at least as important as learning.

Forty-eight percent of the sample, thirty-three members, have stated that they have been involved in this type of learning situation and of these ten come from the group who are, or have been, involved with formal courses. The topics taken by these thirty-three are listed in Table

19. All of these situations are directly related to interests mentioned by respondents.

Table 19.

Informal learning situations used by the sample and the number of respondents (n = 33) involved with each.

Informal learning situations	Numbers involved
Bowls coaching	19
Bridge lessons	4
Computer skills	2
Golf coaching	2
Horticulture	1
Indoor bowls coaching	2
Television workshop	1
Umpire lessons	3
Various crafts	15
Vehicle maintenance	1
Work related training	2

Note. Many respondents have been involved with more than one informal learning situation. Total number of involvements is fifty-two; total number from sample taking part is thirty-three.

Thirteen of the twenty-six women in the sample, or 50%, have been involved in informal courses. This compares with twenty men of the sample total of forty-three, or 47%. Table 20 shows the number of women and men of each age level who have been involved in informal courses. The one woman in the 75+ group is also involved in formal courses.

Table 20

The number of women (n = 13) and men (n = 20) at each age level who have been involved in informal learning situations.

Age level	Women	Men
60-64	5	5
65-69	3	9
70-74	4	3
75+	1	3

No course

Thirty-nine percent of the sample feel little need or desire, at present, for continued organised learning although several stated that if they felt the need they would participate. Their attitude can be summed up by quoting the male graduate in the 75 to 80 age group who said that he is "unable to see [a] need for courses when libraries, friends and colleagues can supply all needed information".

No one in the total sample expressed any desire to attend special programmes tailored to suit the needs of the elderly, as perceived by some authors (for example: Glendenning, 1989; Radcliffe, 1985; Roth, 1975). Indeed the only learning organisation intended for the elderly that received any patronage from this group was U3A. Two people were associated with U3A and one other, although not involved, expressed interest.

Learning

It is not proposed to delve into learning theories but it is important to inquire into relationships between the approaches to learning and aspects of the respondents' backgrounds. The relationships

between:

1) Age and learning;
2) Gender and learning;
3) Income and learning
4) Prior education and learning;
5) Prior occupation and learning;
6) War service and learning
7) Library use and learning;
8) Reading and learning;
9) Associations and learning;
10) Administration and learning;

will be investigated using, where appropriate, Spearman's Rank Correlation Coefficient (Spearman's ρ) and the chi-square (χ^2) test. In each instance where the latter is used the null hypothesis will assume that there is no relationship between the two. Because "the chi-square test assesses only the significance of the association, ... the descriptive percents are essential to an understanding of the data" (Moore & McCabe, 1993, p.613). So statistical results are accompanied by either a figure or a table.

1) Age and learning

It has been suggested that both the age and the cohorts of the elderly have a considerable bearing on learning activities (Tobias, 1991b). Because the ages in the questionnaire were organised into intervals of five years, each pair of intervals can be assumed to represent a cohort. Hence a single statistical operation covers the likelihood of an age or cohort effect. As the number of cases over 75 years of age was small they were aggregated in the following statistical tests.

The participation of each age group in the different types of learning is shown in Table 21. There is no significant difference between the four age groups' involvement in the learning types ($\chi^2 = 4.63$; $\underline{df} = 6$; $\underline{p} > 0.05$).

Table 21.

The percentage composition of each age level of respondents who have been allocated to groups 1 (formal, n=19), 2 (non-formal, n=23), and 3 (no course n=27)

Age group	1 (Formal)	2 (Informal)	3 (None)	n
60-64	32%	42%	26%	19
65-69	35%	26%	39%	23
70-74	11%	33%	56%	18
75+	33%	33%	33%	9

2) Gender and learning

There is no statistical difference between genders in participation in courses (χ^2 = 1.26; df = 2; p > 0.05). Table 22 shows that proportionately more women than men take formal courses and more men take informal courses but that the numbers not involved in courses of any type are very similar.

Table 22

The numbers of each gender in each learning group.

Gender	1 (Formal)	2 (Informal)	3 (None)
Female	9	7	10
Male	10	16	17

3) Income and learning

The probability of there being an association between present income and learning is statistically very small (χ^2 = 5.99; df = 8 ; p > 0.05). This is supported by a Spearman ρ of 0.18, which is not significant at the .05 level, and by Table 23 where the distribution of learning participated in by the groups in different income bands does not reveal any pattern. Half of those with the most and the least income have not participated

in any learning. Those with less than $10,000 have lower participation rates than those in the higher income bands.

Table 23.

Percentage composition on each income level of respondents from learning groups 1 (n=17), 2 (n= 23) and 3 (n = 27).

Income	1 (Formal	2 (Informal)	3 (None)	n
<$10000	25%	20%	55%	20
$10000-$19000	28%	36%	36%	25
$20000-$29000	27%	55%	18%	11
$30000-$39000	33%	33%	33%	3
>$40000	13%	37%	50%	8

The similarity of the incomes of the three learning types is further confirmed by comparing the medians and the first and third quartiles of each. These data are shown in Table 24. The similarity of those participating in formal courses and those involved with none is striking. It must be remembered however that the intervals in the survey are of $10,000.

Table 24.

A comparison of the medians and first and third quartiles of the incomes (in thousands of dollars) of learning groups 1 (n=17), 2 (n = 23), and 3 (n =27).

Statistic	1 (Formal)	2 (Formal)	3 (None)
1st quartile (Q1)	< $10	$10 -$20	< $10
Median	$10 - $20	$10 - $20	$10 - $20
3rd quartile (Q3)	$20 - $30	$20 - $30	$20 - $ 30

4) Background education and learning

It can be concluded that early education has little influence on elderly learning (χ^2 = 8.99; df = 8; p > 0.05). This is supported by a Spearman ρ of 0.07, which is not significant at the .05 level, and by Table 25. The large number of formal course learners who have no formal post-primary educational qualifications is obvious as is the small number with university entrance or advanced trade qualifications. The large proportion of those who have secondary and tertiary qualifications but who have not participated in learning groups since their sixtieth birthday is also noticeable.

Table 25.

The percentage composition of respondents on each level of background education from learning groups 1 (n=19), 2 (n=23), and 3 (n= 26).

Educational Level	1 (Formal	2 (Informal)	3 (None)	n
i	37%	26%	37%	19
ii	28%	32%	40%	25
iii	7%	43%	50%	14
iv	40%	60%	0	5
v	40%	20%	40%	5

5) Prior occupation and learning

The twenty-four occupations listed in Table 5 were placed in four categories - professional, white collar, trades, and unskilled. The relationship between prior occupation and learning as shown by a Spearman ρ is 0.29, which is significant at the 0.05 level, compared with the chi square test which found no association (χ^2 = 4.12; df = 6; p > 0.05). It is probable that there is some association between former occupations and the elderly learning groups.

Table 26 shows the large number amongst trades people and unskilled in group three and the lesser numbers of trades people and unskilled amongst those involved in formal and informal learning. The latter groups contain the majority of the white collar workers. However former professional people are evenly divided amongst the three groups.

Table 26.

Percentage composition of each type of former occupational group from learning groups 1 (n=19), 2 (n=23) and 3 (n=27)

Occupation	1 (Formal)	2 (Informal)	3 (None)	n
Professional	33%	33%	33%	9
White collar	35%	39%	26%	23
Trades	26%	32%	42%	19
Unskilled	17%	28%	55%	18

6) War service and learning

There is no difference in membership of learning groups between those who had service in the Second World War and those who did not. ($\chi^2 = 0.35$; df = 2; $p > 0.05$). (See table 27.)

Table 27.

Percentage composition of respondents with war service and those without war service from learning groups 1 (n=19), 2 (n = 23), and 3 (n = 27).

Service	1 (Formal	2 (Informal)	3 (none)	n
Yes	24%	31%	45%	13
No	29%	34%	38%	56

7) Library use and learning

It is probable that there is no association between library use and learning ($\chi^2 = 7.23$; df = 6; p > 0.05). Table 28 supports this conclusion.

There is an indication that those who never use the library have low participation rates in formal and informal learning. But the large number of group three in the *never* category is balanced by a number almost as large in the *frequently* category. Those who frequently use the library participate in informal courses at a much lower rate than less frequent library users.

Table 28.

Percentage composition at each level of stated library use comparing learning groups 1 (n=19), 2 (n=23), and 3 (n=27).

Stated use	1 (Formal)	2 (Informal)	3 (None)	n
Frequently	35%	25%	40%	20
Often	31%	46%	23%	13
Seldom	35%	35%	30%	20
Never	6%	31%	63%	16

8) Reading and learning

A wide variety of materials appears to be read by the sample as a whole. The percentage of respondents in each of the three learning groups who regularly read each type of material listed in the questionnaire, except race guides which are read by only one respondent, is shown in Figure 6. The large percentage from each group who regularly read newspapers, all but four of the total sample, indicates an interest in current happenings that can also be considered part of their learning. A large number from each learning category regularly read non-fiction.

Figure 6 indicates that for all types of reading material groups one and two members tend to use a wider range than do group three members and that those people who have not participated in obvious further learning are still to be considered frequent readers.

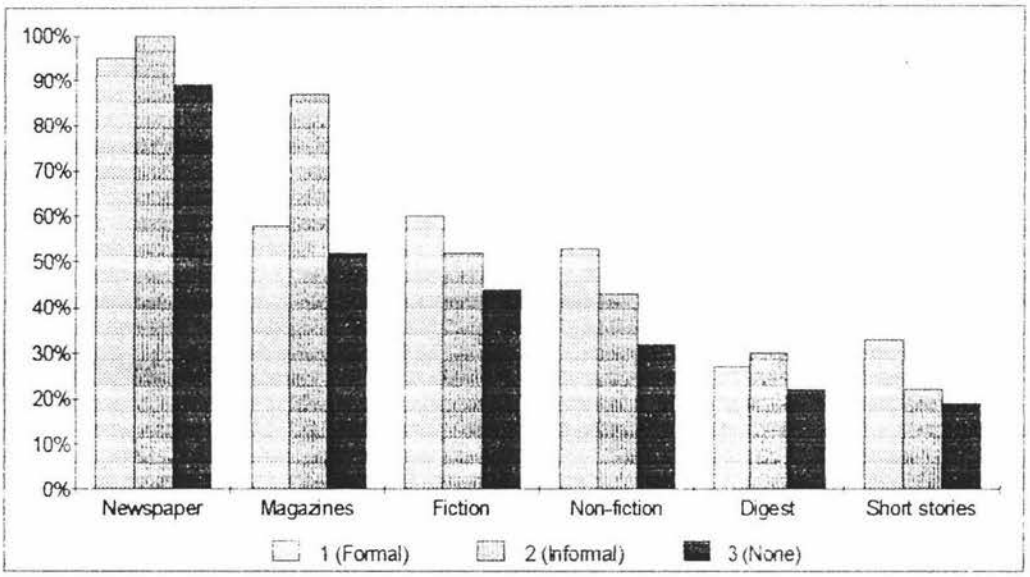


Figure 6. The percentages of members of learning groups 1 (n =19), 2 (n = 23), and 3 (n = 27) who regularly read the named types of reading material.

9) Associations and learning

It has been suggested that the various types of social association provide either a low or a high element of learning (p. 19). Table 29 illustrates the involvement of members of the three learning groups in all of the associations. A large number of those in group three, compared with the numbers in groups one and two, either do not belong to any association or do not answer.

Any association between learning groups and the number of organisations individual members of the group have joined is unlikely (χ^2 = 13.95; df =10; p > 0.05). Table 29 shows that there is a tendency for members of group one to be involved with more organisations than group two who tend to be more involved than group three. Fifty-six

percent of the twenty-seven respondents ($n = 15$) who either stated that they are not involved in any organisations or failed to answer the question are included in group three. In spite of this the probability of any association between affiliation with an organisation and learning groups is unlikely ($\chi^2 = 4.81$, $df = 4$, $p > 0.05$). The table does not show that all of those in the three learning groups who have no affiliations with service, aid, social and cultural organisations are involved with sport, except for three individuals in group 3.

Table 29.

Percentage of respondents involved with given numbers of service, aid, social and cultural associations according to learning groups 1 (n=19), 2 (n=23), and 3 (n=27).

Number of Affiliations	1 (Formal)	2 (Informal)	3 (None)	n
Nil or NA	18%	26%	56%	27
1	26%	48%	26%	19
2	22%	44%	34%	9
3	50%	0	50%	8
>3	50%	50%	0	6

However of those respondents in group three who do belong to an organisation eight individuals (67%) are connected to one or more of those which have a large learning component. Comparable figures for group one are twelve individuals or 86% and for group two are nine individuals or 56% as shown in Table 29.

It was thought that perhaps there would be an association between the learning groups and membership of those types of organisations which have some learning component if those who claimed allegiance to no organisation were removed from the calculation.

Table 30 illustrates members' involvement in those associations which are thought to provide a high element of learning. It includes only the forty-two individuals who are shown in Table 29 as being affiliated to an association. In other words, twenty-seven individuals who have no affiliation or failed to answer the question have been omitted from Table 30. It is probable that the number of affiliations with organisations of this group, summarised in Table 30, bears no relationship to the learning groups when individuals who are not members of any organisation are excluded (χ^2 2.97; df = 4; p > 0.05).

Table 30

The distribution of the affiliations of individuals from learning groups 1 (n = 14), 2 (n = 16), and 3 (n = 12) who are involved with service, aid, social or cultural organisations which have a high learning component excluding those who have no organisational affiliations.

Affiliations	1 (Formal)	2 (Informal)	3 (None)	n
No affiliation	2	7	4	13
One or more	12	9	8	29

10. Administration and learning

It is extremely unlikely that there is an association between sports administration and learning (χ^2 = 0.24, df = 2, p > 0.05) or between group administration and learning (χ^2 = 1.64, df = 2, p > 0.05). Tables 31 and 32 support these conclusions.

Table 31.

The percentage composition of those involved in sports administration from learning groups 1 (n = 19), 2 (n = 22) and 3 (n = 26), and of those who are not involved.

Administration	1 (Formal)	2 (Informal)	3 (None)	n
Involved	26%	35%	39%	31
Not involved	31%	31%	38%	36

Note: Seven respondents are involved in the administration of two or more sports.

Table 32.

The percentage composition of those involved in group administration from learning groups 1 (n = 16), 2 (n = 22), and 3 (n = 24), and those not involved.

Administration	1 (Formal)	2 (Informal)	3 (None)	n
Involved	21%	50%	29%	14
Not involved	27%	52%	42%	48

Note: One respondent is involved in the administration of two groups.

Summary

It is convenient to posit three learning groups - those who have been involved in formal courses since turning sixty, those who have participated in informal learning situations, and those who have been involved in neither.

A large number and variety of courses are in use. Many of those who have been participating in formal courses have also been involved in informal learning. A large number of sample members are involved in a wide range of topics in informal learning situations. From the wide range of reading indulged in by the respondents it can be assumed that virtually all of the sample is taking part in some form of learning.

In this study relationships between the learning groups and age, gender, income, war service, prior education, library use, reading, and administration have not been established. Relationships are possible, although improbable, between learning groups and service, aid, social, church, and cultural organisations. An association has been established between former employment and the levels of learning participation of this sample.

5 - Discussion

The expressed aim of this study is to obtain information about the learning of older adults and how it is related to their present and past backgrounds. It was thought that this research would provide information on the elderly and their activities that reflected current conditions in New Zealand and that that could be compared to international studies and New Zealand studies based on eighteen year old statistics. It is not claimed that this study is relevant to all, or even most, of the older adults in New Zealand, but it is suggested that the findings are valid for the group being surveyed and provide insights which are unobtainable elsewhere.

The data that has been gathered suggests that retired adults meet their perceived learning requirements without the assistance and the support from educationalists that has been thought necessary by many writers in the field of educational gerontology (for example: Glendenning & Battersby, 1990; Krupp, 1995; Russell, 1993; Trent & Trent, 1977). It also suggests that the measurable background of older people is not an indicator of their approaches to learning. The evidence supports an impression that the "elderly" are more active in learning than has been concluded from other studies.

The discussion which follows consists of several sections. Patterns of learning are investigated in the first part. This is followed by an examination of possible indicators to the learning approaches of groups of elderly. Next is an examination of this study's implications on proposals put forward by several authors. Finally three new proposals are developed.

Patterns of learning

It had been assumed that unless formal education, as for example that provided by courses, was undertaken, little or no learning was taking place (Battersby, 1985; Radcliffe, 1985; Roth, 1975; Tobias 1991a). The evidence supplied by this study leads to quite different conclusions.

A consideration of the relationships between courses taken by individuals with the organisations with which they were involved provides this different view. Twelve of the nineteen respondents who participated in formal courses, and sixteen of the thirty-three involved in informal learning situations, named courses the subjects of which were quite obviously associated with groups with which they were involved. Examples, taken from those involved in formal courses include a gardening course and the rose society, computer studies and secretarial administrative work. Other examples, taken from those involved in informal learning situations, include bowls coaching and membership of a bowling club and craft classes and membership of craft clubs.

Hence it follows that, for many of the respondents, involvement in retirement interests leads to a desire to become more knowledgeable about them. In turn this develops into an active participation in learning situations. When knowledge, or expertise, has been acquired the need perceived for some type of structured learning has been satisfied and is replaced by a sharing of skills and knowledge with others through a club or other association. Further self-instruction is available through discussion, reading, radio and television. Figure 7 shows the series of experiences involved in this process. It is not known whether the interest precedes the joining of some organisation or joining an organisation leads to the development of an interest. It could be that both alternatives are used. The case of the man who completed a greenkeeper's diploma course in order to be at least as knowledgeable as other bowling club members and then joined a greenkeeper's association suggests that the interest arose from one organisation, led to a course of study which preceded joining an organisation which was directly related to his course.

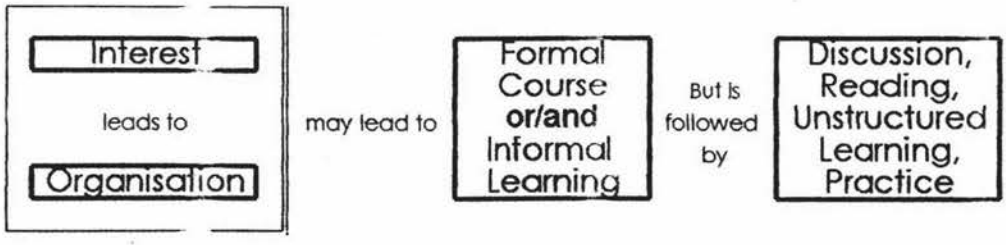


Figure 7. A diagrammatic representation of a learning pattern inferred from the evidence.

A woman in the seventy-five to seventy-nine age group stated that if the need arises undertaking further courses may be found necessary.

The likelihood of there being any such a progression was unexpected although there were slight indications of its possibility in the tables in Bird & Fenwick (1981). 74% of their sample of elderly were interested in further learning although only 11% had participated in formal courses over the previous year. 59% preferred using classes for formal learning, while another 24% would rather have private lessons, but, when learning about their interests, 50% preferred to practise and 11% liked to receive help from others; only 12% preferred classes. The interest shown in formal learning, together with the large proportion who would rather be taught, combined with practice and receiving help, fit into the pattern suggested by this study.

There is also some evidence that this is not the only pattern to be found in the learning of retirees. For instance three respondents claimed that they were involved in university studies and university extension studies for the pleasure of keeping their minds active. One of these, a woman typifies the group. The topics of the courses in which she is involved do not appear to bear any relevance to the organisations with which she is associated. It would seem that some of the topics are related to her wish to pass a written record to her children and grandchildren but others would seem to be completely irrelevant to any of the information she supplied on the questionnaire form. Two others, both women, perceive courses as means of redressing a lack of educational opportunity earlier in their lives. The courses in which they have been involved seem to bear no relationship to any of the data they supplied.

Because of this lack of information it is unfortunate that direct information about the interests of respondents was not obtained through additional questionnaire questions. Two issues raised by Bird & Fenwick (1981) which were also omitted from the questionnaire could have been of value. The first, the preferred methods of learning, refers to learning in a more-or-less structured way. The examples given by Bird & Fenwick (1991) are classes, private lessons, discussion groups,

mail, talks, television and radio. The second, preferred methods of learning about interests, refers to the whole spectrum of learning and includes help from others, classes, teaching oneself, private lessons, associating with other learners, correspondence, and talks.

Indicators to later learning

Tobias (1991b) suggests that overseas research has "demonstrated a high positive correlation between early education and levels of initial education and educational participation during adulthood". As will be seen later he extends this to older adulthood. His suggestion is supported by Heppner (1994a, p.16), "... the majority of those older people who participate in educational activities were those who have the highest levels of education, income and employment." The property of early education as a predictor of participation in courses in retirement will be discussed at length later. Here the predictive qualities of other factors, income level, gender, age and former employment, will be examined.

Income level

Although the educational group that is not involved in either formal or informal courses has twice as many members as the formal course group on the lowest income level it also has four times as many on the highest level. So it is not surprising that there is no significant correlation between present income and learning groups ($\rho = 0.18$, $p > 0.05$).

A weakness in the questionnaire may have affected the results. Smaller income intervals may have been advantageous in gaining a truer picture. Before using the questionnaire the actual range of incomes was completely unknown. It was thought that an interval of at least $10,000 would be necessary. Such a figure would appear less intrusive and be less difficult for each respondent to calculate hence the question was more likely to be answered. However, although the national superannuation for one person is below $10,000, just a few dollars extra each week, which could be gained by baby-sitting, sale of

handcraft or interest on savings (to quote just a few), would put the recipient into the next income level.

It is possible that with such an alteration a slightly different statistical conclusion may have been reached. However as it stands this study found no relationship between present income and current learning practices. There may have been some relationship between pre-retirement income and educational activity in retirement but this proposition was not investigated.

Gender

Although women make up 38% of the sample they comprise 47% of those taking formal courses, and 39% of those involved in informal learning. But these figures are misleading in that several women were involved in both formal and informal courses. Slightly more than one third (38%) of the women are in the group which do not participate in courses. These figures support the conclusion that, although women appear to be more active in their learning activities than men, a relationship between gender and learning in the elderly is statistically improbable ($\chi^2 = 1.26$; $\underline{df} = 2$; $\underline{p} > 0.05$).

Age

It might appear that earlier cohorts have had less educational opportunities than later ones - that as the century has proceeded there has been more emphasis on longer schooling and higher educational qualifications. It could also be claimed that as the elderly become older their learning activities lessen. Such suggestions are not borne out by this study. At least some of the elderly continue to be actively involved in further learning to advanced ages. Unfortunately only four people over eighty years of age have been included in the statistical analysis and all are men. A higher number, particularly with the inclusion of women, would have provided stronger evidence. Nevertheless, no lessening of learning activity with increasing age has been demonstrated ($\chi^2 = 4.63$; $\underline{df} = 6$; $\underline{p} > 0.05$).

Former employment

When former employment is placed into the four categories, professional, white collar, trade, unskilled, and these are compared within the three learning groups a positive Spearman ρ of 0.29, which is significant at the 0.25 level, is obtained. This correlation though positive, is insufficient to be of practical use in predicting who will take part in formal courses, informal learning experiences, or neither. However, the association between trades and manual former occupations and a lower rate of engagement in further learning suggests that people who have needed little reading and writing in their working lives may be less likely to look for further education in their retirement.

It is interesting to speculate that the type of occupation would suggest a greater interest and possible involvement in, together with an ability to pay for, the more formal type of learning. Unfortunately for this premise the share market collapse of 1987 involved the retirement savings of many people. As a consequence those retirees who are now in the higher income groups are probably those, like ex-government servants, who invested through their working lives in superannuation schemes.

Tobias' speculative proposals

This study does not support the speculative proposals put forward by Tobias (1991b) for the shortage of older adults participating in courses and as reasons for his proposals for educating the elderly, nor does it necessarily refute them.

Proposal one

Tobias' (1991b, p.424) first proposal suggests that as "a large number of studies have demonstrated a high positive correlation between levels of initial education and educational participation during adulthood" the lower participation rates of older adults is the result of a lack of earlier educational opportunity for the older cohorts.

The proposition seems logical. Figures from Bird & Fenwick (1981) definitely demonstrate that younger adults had a greater participation rate in courses than those over fifty-five. As indicated above it is also probable that as this century has progressed educational opportunities for youth in New Zealand have steadily improved - at least for those who had become adults by the time of the 1978-79 Department of Education survey.

This speculative idea is, however, based on three assumptions: first, that there is a high positive correlation between levels of early and later education; second, that courses are a valid measure of educational activity; and third, that the courses undertaken during the previous twelve months provide a valid measure of educational activity. Unfortunately Tobias (1991b) did not cite his source(s) supporting the first assumption. However Granick & Friedman (1973, p.61) cite Johnstone & Rivera (1965) in stating that:

> "interest in learning tends to increase in all adult age groups, including the elderly, in direct relation to their educational attainments. This interest is matched by the fact that the rate of participation in adult education activities is also related to the previously acquired level of education."

This theory is repeated in the report of the Social Advisory Council (1984, p.27): "there is clearly a relationship between previous education and continuing educational interests in later life". The male graduate in the sample who stated that he was "always used to continuous learning and since retiring found myself getting rusty" provides evidence supporting this claim.

The sample used in this study was eighteen years younger when the previous New Zealand research was conducted so the younger members would have been included in the under sixty age group at that time. These would be a more educationally advantaged group than those who were of a similar age in 1979 (Heppner, 1994a) who

now make up the eighty to a hundred age group. It follows that the increase in the number of those participating in courses shown in this study would appear to support Tobias' (1991b) suggestion that those with higher levels of early education would be more likely to participate in learning when elderly.

This study does not show this. It has shown that the probability of there being ***no*** relationship is extremely high. The correlation between previous education and present learning is a Spearman $\rho = 0.07$ which is not significant at the 0.05 level. This suggestion is supported by two women one between sixty and sixty-four, and the other between sixty-five and sixty-nine, neither of whom had the opportunity for higher education but are now taking courses for enjoyment and to assist with voluntary work.

Secondly, considering the large number and range of learning activities this study's sample is involved in it seems inappropriate to suggest that a measurement of their participation in formal courses could be a valid measure of such activity. The Bird & Fenwick (1981) study was designed to assist the Department of Education in planning further formal courses for adults in general and hence did not include a measurement of non-formal learning. Forty-eight percent of this sample have taken part in informal courses compared with twenty-eight percent who have participated in formal courses. These figures suggest that Tobias (1991a), in using the Bird & Fenwick (1981) data, omitted a type of learning which could be assumed to be more appropriate to retired people and a better indication of their continued intellectual activity. However, it could be argued that the proportionately large number of people currently involved in formal courses, compared with the number described by Tobias (1991a), is a reflection of the large number of activities of this group as a whole. If so it would be necessary to show that the lesser number of course participants in the Bird & Fenwick (1981) study was a reflection of the learning activities of that total sample, for which no figures are available.

In this study respondents were asked to list formal courses in which they had been involved since retirement. Nineteen respondents had taken

part in at least forty-five courses. As has been described elsewhere in this report, some of the courses which were assumed to be one may have actually been more. During the past year 16% of the respondents sixty-five and over had been involved in a formal course. From the responses to the question it had been hoped to tabulate the number of courses per year for several years but such was impossible from the answers supplied. This would have provided support to statements about the validity or otherwise of using the numbers of people involved in courses during a single year. The evidence gathered, however, neither supports nor negates the validity of Tobias' idea that the number of people involved with courses in a single year is an adequate measure of learning activity. This study does not endorse Tobias' first proposal.

Proposal two

In his second proposal Tobias (1991b, p.242) suggests that the lack of pressure on older adults to obtain higher job qualifications is a reason for their lower participation in courses. This could quite well be true but one developmental aspect has been neglected. In the years when these people were working *full employment* meant that, although many did attempt to improve their vocational qualifications, the inducement to do so was considerably less than the pressures that have developed in the last few years since the policies of *rationalisation* and *restructuring* have become widespread.

It could be that people of the generations in the sample are actually becoming more involved in courses than they were before retirement. It is possible that the imposition of a more or less fixed curriculum in the primary and secondary schools of their time, followed perhaps by a rigorous vocational programme with very little choice are superseded by the freedom to choose subject and method offered by many organisations which together provide an extremely wide choice. At retirement, for the first time in the adult lives of many, there are no longer the stresses and controls of being either the bread-winner or the bread-winner's helpmate. Consequently a period of adjustment takes place which is dependent on the individual and on the spouse - the

length and difficulty of the change being greater for men than for women (Koopman-Boyden, 1988; McCallum, 1986).

This survey tends to support these ideas. All but one of those who are participating, or have participated, in formal courses in the sixty to sixty-four age group are women. In the next age group relative proportions of men and women are similar, 33% and 38% respectively. These data lead to the assumption that as adjustment to their changed situations proceeds, and as retirement interests increase, some retirees discover a need to resume formal learning. The present study also presents some evidence that people did not have the time before retirement to participate in formal learning and that learning without the requirement to sit examinations makes learning a more pleasurable activity.

Needs for knowledge can be satisfied in ways other than formal courses. Forty-eight percent of the sample use informal learning situations for which no provision was made in the Bird & Fenwick (1981) investigation. Fifty-three percent of those involved in formal courses are also using informal learning situations. Amongst the thirty-nine percent of the sample who use neither formal nor informal course-type learning, reading and associations with social groups are used to broaden understanding and gain knowledge. Using a broader definition of the term "learning", it is quite clear that all but two or three of the sample are regularly in learning situations.

As these people are retired Tobias' proposal that job-pressure no longer influences them into undertaking formal courses is correct. His assumption that formal courses can be used as measures of learning activity is inadequate. It does not measure the other avenues of learning which can be used by older adults and which are demonstrated here.

Proposal three

The third suggestion is that the "impact of [the] aging processes ... may partially account for the differences ..." (Tobias, 1991b, p.424). Because

these people *are* becoming older his use of the word "partially" means that his proposal cannot be falsified.

When the aging process is mentioned one thinks of ill health, sensory diminution such as failing eyesight and poor hearing, lack of mobility and a lessening of reasoning abilities. As reasons for non-participation in courses only two members of the sample used their own ill health, another mentioned the need to care for a sick person and just one used age. Apart from those four, respondents seemed to support the studies of Battersby (1982), Denney *et al* (1992), Granick & Friedman (1973), Radcliffe (1985) and Sakato & Fendt (1981) that showed no lessening of mental activity in the elderly and demonstrated the ability of the older people to learn.

Sensory impairment and declining health in older people may interfere with participation in formal learning but cannot be directly related to declining ability to learn. As early as 1967 Eisdorfer (1967, p.18) suggested:

> ". . . that autonomic and performance factors play a significant role in our attempts to define learning ability in the aged and that much of the deficit in learning studies which is observed may be an artefact of our failure to understand these variables ...".

Studies by Granick & Friedman (1973), Sakato & Fendt (1981), Battersby (1982a & b) and Hultsch *et al* (1993) demonstrated that the ability to learn does not deteriorate with increased age and that measurable intelligence does not decline even in seventy and eighty year olds, provided that there is freedom from disease together with adequate social and emotional stimulation. Consequently those involved in a sport and an organisation which together can provide social, emotional, and physical stimuli would appear useful for an investigation into learning habits of the elderly.

Hultsch *et al* (1993) suggest that objective health reports and cognitive functioning bear little relationship and Jarvik (1973, p.66) states "the natural course of aging in man does *not* include cognitive decline".

Denney *et al* (1992) investigated the ability of three groups, young, middle-aged, and elderly adults, to solve everyday problems. They found little difference, but in opposition to stereotypes of older people, in several of their experiments the elderly were slightly more efficient than either of the other two groups. "The ability of older persons to learn, and to acquire new qualifications is not diminished" (Radcliffe, 1985, p.189).

An earlier statement by Jarvik (1973) qualifies these ideas. She cites longitudinal studies that indicate a rapid slowing down of the *speed* of intellectual functioning somewhere between the ages of 18 and 49 but not thereafter. And Norman *et al* (1992, p.264) suggest that "with advancing age working memory declines". This may be so, but declining working memory does not mean that the ability to learn ceases. In addition, the decline with "advancing age" may be slowed down as the improving general health of older people allows more of them to enjoy active mental and physical lives into their eighties and nineties.

This survey strongly suggests that after retirement learning processes continue. The use of a chi square test showed no significant difference in their learning between age groups in the sample. It is suggested here that the learning of those in the sample is for different, and for the individual possibly more profitable, reasons which may not be obvious to younger people.

Proposal four

Tobias' fourth proposal refers to the "large number of policies, mechanisms, and practices [that] serve to create increasing dependency among older people rather than maintaining and fostering independence" (Tobias, 1991b, p.425). It is assumed that he is referring to that psychological state which has been termed "learned helplessness" (Solomon, 1982); the condition which seems to be induced by carers, particularly health and social workers, and chiefly in institutions (Koopman-Boyden, 1993).

This study does not attempt to investigate this phenomenon, but because the majority of the members of this sample live in their own homes it can be assumed that they must *ipso facto* retain a large degree of independence.

Proposal five

The fifth proposal suggests that capitalistic "policies and practices that exclude substantial sections of the working class from important forms of education suppress the creative, critical and reflective capacities of these people, and result in rejection by many of those educational opportunities that are available" (Tobias, 1991b, p.427). This was not specifically addressed in this study.

All the same it has been shown that the annual incomes of the sample range from less than $10,000 to more than $50,000, that past occupations range from unskilled to professional, and that early educational qualifications range from none to post-graduate. Hence, it can be argued that the respondents come from most sections of society. In spite of this it has been demonstrated that nearly all of them have been involved in gaining, in one way or another, knowledge about the things that they are interested in and that their past occupations bear little relationship to the type of learning experiences in which they are engaged.

Tobias' conclusion

The section on factors that militate against older adults taking part in formal learning concludes thus:

> "the fact that nearly 70% of those 65 and over expressed no desire to engage in any formal learning and only 5.5% of those over 65 had participated in any form of education in the previous year may be seen as indicative of a political economy that distorts human growth in the interests of capital accumulation" (Tobias, 1991b, p.427).

In contrast a comparable statement from this survey is: 72% of those sixty-five and over expressed no desire to engage in formal learning, 26% had participated since age sixty, while 16% of those sixty-five and over had taken a formal course during the past year. Nearly 66 % of those who had not undertaken a formal course had participated in an informal learning situation since age sixty. Not one of this sample used shortage of money as a reason for not participating.

These statements can be compared with the statement about all adults, not just the elderly, from the National Institute of Adult Continuing Education of England and Wales (1994) cited by Hughes & Tight (1995, p.300):

> "... only 10% of those aged seventeen or more were currently studying anything. Some 24% had studied within the last three years, but the majority, 52%, claimed not to have studied at all since they left school."

Further proposals

Tobias is not the only New Zealand writer who has suggested means for overcoming the apparent reluctance of the elderly to learn. In this section suggestions by the Social Advisory Council and by Battersby will be investigated in the light of the discoveries made during this research.

Various interest groups comprising, in the main, younger people, for example church groups, social workers and rest home workers, formed the Social Advisory Council. This committee, having stated that "insufficient is known as to what New Zealanders actually do in later life" (Social Advisory Council, 1984, p.27) saw fit to put forward suggestions for the education of older adults, their recommendations to the government including the following:

> "Recommendation 11. That the Minister of Education be requested to promote the provision of educational opportunities for students aged over 60 as part of overall lifelong education programmes.

> "Recommendation 12. That the Minister of Education be requested to encourage tertiary educational institutions to provide credit and non-credit courses that suit the learning needs of older students." (Social Advisory Council , 1984, p.56)

In proposing that there is a need to provide learning situations for the elderly they have been joined by Battersby (1982a), Glendenning & Battersby (1990), Heppner (1994a), Swindell (1990), Trent & Trent (1977), Tobias (1991b) and Withnall & Percy (1990). Their attitude can be summed up thus:

> ". . . if we . . . neglect the educational, social and recreational needs of those in later life, we do so at our peril, for we will face a mounting economic and social burden because of *the decline of older people's physical and mental health through their isolation, inactivity and lack of recognised role*" (Ageing and Education Working Party, 1987, p.33, but my italics).

Maintenance of physical health and the ability of older adults to learn has been touched on earlier (pp. 65-66). However the italicised phrase needs further examination.

Isolation, inactivity and lack of a recognised role

The evidence gained in this study, that these people are mostly active in sport and other organisations, without the guidance or assistance of a group of younger people, demonstrates that, for this sample at least, problems created by the concepts conveyed by the italicised phrase in the quotation above have been overcome. If respondents have suffered from isolation they appear to have compensated for it through their own, or their friends', efforts in joining the large number of organisations listed above in Table 7 - service, aid, social and cultural associations, Table 17 - educational organisations, and 19 - informal learning situations.

Those who have little or no contact with active older adults (as opposed to institutionalised elderly) imagine that inactivity and the lack of a recognised role are characteristics of the elderly. It is apparent, however, that these ideas are irrelevant to this sample, all but three of whom are involved in sport of some kind. The statements of two men, one in the sixty to sixty-four age group, "I am too busy with other activities, e.g. bowls, gardening, family," and the other in the eighty to eighty-four age group, "My time is filled up with family and sport," indicate that they are very busy people even without their mentioning any home commitments. That their active lives are not isolated examples is shown by the two hundred and fifteen associations, sports and pastimes in which these sixty-nine people are involved together with the administration of fifty-seven sports and associations. These figures do not include involvement in courses, formal and informal. Nor do they include property maintenance, housekeeping, and involvement with families for which no figures are available. It is also possible that all of the organisations to which members are affiliated are not listed. The fact that only two of the thirteen who served in the forces during World War Two claimed membership of the R.S.A. is evidence of this.

These data would indicate that "the educational, social, and recreational needs of those in later life" (Ageing and Working Party, 1987, p.33) are being met by this sample.

Educational needs and obstacles

Battersby (1982a) suggests that, since the number of elderly is increasing, they have a right to have their needs for further education catered for. He lists the educational needs of the elderly which have been proposed by an American, McClusky (1971) and relates them to New Zealand. The four needs listed are coping needs, expressive needs, contributive needs and influence needs.

In describing means to cater for these needs Battersby (1982a, p.31) states that "several of the major obstacles that adult educators may encounter in establishing ... programmes [designed to meet some of

these needs] need to be recognised" and proceeds to mention negative attitudes, stereotypic images and eight difficulties - obstacles encountered by tertiary organisations to the setting up of further learning facilities for the elderly - which were discovered by Trent & Trent (1977) in a survey of universities and colleges in the United States of America.

In contrast to these views it is suggested here that the needs listed actually apply to all adults and not merely the elderly. The difference between other adults and those who are retired is that the retirees have the time to satisfy their needs by pursuing interests both old and new. These interests are not necessarily leisure pursuits. They may be concerned with family and with voluntary community assistance. Nevertheless a discussion of the needs and the means taken by this sample to cater for them follows.

Coping needs

Battersby (1982a, p.31) cites McClusky (1971)

> "... coping needs are met by such programmes as adult basic education, health education, training for economic improvement, legal arrangements, family adjustments, and use of leisure time ... [they] are related to social adjustment, psychological health and physical well-being."

It has been forgotten, or never understood, that during their lives the elderly have already faced, and generally coped with, constant and tremendous alterations in attitudes, understandings, and living conditions. Withnall & Percy (1994, p.155) refer to this when they state,

> "... participation and non-participation [in learning activity] have generally been grounded in a here-and-now context and have made little reference to the tremendous changes in the world through which current cohorts of older people have lived and how they perceive them".

From such successful experience they can probably manage further changes as they grow older better than the educators who, presumably, are considerably younger and therefore do not have such a background of experience - "few are able to appreciate change as much as those who have survived it" (Radcliffe, 1985, p.184).

Older adults' involvement in life changes means that their approach to most things, including learning, is qualitatively dissimilar to that of the less sophisticated younger adults and children. This is exemplified by the woman between seventy-five and seventy-nine who participates in formal courses, informal learning procedures and reads a lot. "I learnt to play bridge at seventy-five and now play two days a week; do my half acre of garden except for lawns, play golf two days a week if I have time. Hopefully my children like my company because I am not too much of a bore or tie! That's what learning is about."

Expressive needs

Battersby (1982a, p.31) citing McClusky (1971) states that "expressive needs refer to those activities which have intrinsic meaning and pleasure ... [and] may include physical education, liberal and general educational studies and hobbies".

It has already been stated that all but four of this sample are involved with sport. In fact the sixty-five respondents have one hundred and twenty-five affiliations with sports and pastimes. The formal and informal courses in which they are, or have been involved, together with their sports and pastimes support the claim that, without express provision for educative facilities for the elderly, the majority of this group of older adults is catering for their expressive needs.

Contributive needs

Battersby (1982a, p.31) still citing McClusky (1971) states that "contributive needs ... encourage the aged to assist others in society

through voluntary organisations and can be met by leadership and various community education programmes".

A list of those organisations which can be termed "welfare groups" and with which some respondents are involved, such as Age Concern, Birthright, the Blind Foundation, the Cancer Society, Kapiti Carers, Meals-on-wheels, St. Vincent de Paul Society, Save the Children and various church groups, would tend to suggest that people who feel a need to assist others in an organised way are already doing so. The contributions of those in this sample who are taking part in the administration of various groups are also satisfying this need. All of these are already contributing to the community either without having been provided with a specially designed course or having participated in a course which is already available. The latter position is exemplified by the man in the eighty to eighty-four year old age group who took university hospital studies in order to become more effective in the Kapiti Carers organisation.

Influence needs

Battersby (1982a, p.31) citing McClusky (1971) states that "influence needs reflect the desire of the elderly to play a part in the direction and quality of their own lives". He then suggests that "leadership and community education activities, as well as programmes related to political awareness are required".

It is difficult to decide what he means. The programmes he sees as necessary appear to be an attempt to embroil the elderly in politics, the influencing of others. The definition suggests that they should be controlling their own lives.

It has already been suggested, above, that retirees do not have many of the constraints faced by people who are working. This would more than suggest that they have greater control over their own lives than younger adults have over theirs. For example, one respondent, a

woman in the seventy-five to seventy-nine age group, states, "I decided to give up courses and enjoy life and travel. I'm still learning however".

If Battersby means that the elderly have a need to influence others, this group are certainly having an impact on the community through their involvement with their families and through active participation in the various organisations, mostly devised for younger people, to which they belong. This is demonstrated by the fifty-two percent of the sample who are involved in administration. Awareness, or interest, in local, national and international affairs is indicated by the large number who regularly read newspapers.

The inescapable conclusion is that specially devised educational programmes to cater for any of the four needs postulated by McClusky (1971) as cited by Battersby (1982a) are unnecessary for a group such as that which forms the sample used in this study.

Obstacles

Trent & Trent (1977), cited by Battersby (1982a), suggested that in the United States of America various obstacles or problems in setting up programmes for the elderly had been found. Although it has been suggested here that there is little or no need for such programmes three of the suggested difficulties which affect the elderly more than institutions will be looked at. These are: cost to potential participants; locating or contacting the audience; lack of interest on the part of older people.

Cost

Possibly the costs for courses in New Zealand are lower than in the United States of America because the amount charged does not seem to have had any effect on course participation. The only member of the sample who mentioned cost stated, "I do not see the need to pay for courses - libraries, friends and colleagues provide me with all the information I need."

That cost has not been a determinant in people deciding whether to take courses or not is indicated by the fact that the median and interquartile ranges of the annual incomes of the groups who have taken formal courses and those who have not lie within the same intervals. Nevertheless a case could be made for the supposition that access to educational facilities would be more difficult if costs were to continue increasing at a faster rate than the increase in the income of retirees.

Although it has been shown that there is no relationship between income and formal and informal course participation this could change quite dramatically. It has been noted that twenty-nine percent of the sample have no income other than national superannuation and also that ninety-four percent own their dwellings. When allowance has been made for tax, rates, house insurance and maintenance, food and clothing it will be seen that there is little remaining for "luxuries" such as educational courses. In spite of this forty-five percent of those in receipt of National Superannuation as their only source of income have been involved in formal and informal courses. So it is conceivable that if costs continue to escalate these people, at least, are likely to be unable to continue with this style of learning.

Publicity

Not one of the sample seemed unaware that courses are available. This could be partly a result of their regular newspaper reading. National and local newspapers regularly carry advertisements of regional and national educational establishments. The "Evening Post" and "Dominion" often have special supplements advertising the offerings of a number of educational institutions. Local schools distribute handbills, which appear with the junk mail in letterboxes, to advertise their night and day classes.

It could be that the higher participation rate in this survey than in the Department of Education survey of 1979 (Bird & Fenwick, 1981) is an indication that the advertising of courses and institutions is effective.

Lack of interest

The summary of reasons for non-participation in courses, Table 13, shows that 22% of this sample are not interested and that 24% failed to answer. The lack of interest of 46% of the sample could be an indication that learning needs are being met in other ways. The statement "community service and other types of learning take up too much time" (woman, 70-74), which is typical of responses from this section of the sample, could be taken to indicate that any need for acquiring knowledge is being met in ways other than course participation, rather than showing a lack of interest in courses.

A contrasting view

The evidence that has been gained through this study suggests a contrasting view. Learning needs *are* being met. The obstacles described in the reports of Tobias, Battersby and others have little effect in preventing this.

Learning takes place amongst the elderly to a much greater extent than is realised.

The picture of the elderly person gently moving a rocking chair on the verandah is completely false for the active elderly as this study shows. It has been indicated that most of the respondents are very busy people. Even the 39% of respondents who were not involved in courses of any kind, and thus are included by Bird & Fenwick (1981) amongst those uninterested in courses and described by Roth (1975, p.7) as "... the multitude of people who drift through life in happy oblivion ...", are very much involved with their organisations, community affairs, homes and families. As one woman wrote, "If I was not so involved in sport and administration I would have the time to enter formal education programmes." Whether this active participation in sport and involvement with others leads to a healthy, mentally active life or whether active, albeit self-directed, cognitive activities determine which older adults will have a capability for physical and social activity is not clear.

Withnall & Percy (1994, p.151) state that:

> "Children, adults and older adults continue to learn throughout their lives as they are exposed to new information, pass through life stages of opportunity and crises, move into new roles, pursue interests and have socially-constructed needs. They may not identify the learning activity involved as 'learning' and it will rarely - certainly for adults and older adults - have anything to do with the formalised processes which educators and trainers call education and training."

In this present research the learning activities of older adults were looked at in this wider sense. In spite of the busy lives of the sample answers to the questionnaire show that only two members may not have been regularly involved in some form of learning. Nine respondents were involved with formal courses, ten with formal courses and informal learning situations and thirteen with informal learning activities. Those could all lead into the further sharing of knowledge through association. All but two of the sample were using informative reading material. It appears then that almost all of this group of senior adults is involved in learning and is, in this aspect of their lives, considerably more occupied than either they or others would imagine.

Older folk gain and use their knowledge in a more creative, self-motivated and self-controlled mode than younger adults and children.

Prior to this study it was accepted by this writer that authors who seem to equate the education of older adults with the learning of younger people had based their assumptions on knowledge. For instance Russell (1993, p.48) when describing the Australian College for Seniors declares that "mental stimulation for seniors has been neglected". Roth (1975, p.7) admits that among the New Zealand elderly there is a "sprinkling of those who can still kindle a spark of intellectual curiosity from the cinders of their lives".

Then Trent & Trent (1977, p.232) after quoting McClusky's (1971) ideas about the needs of the elderly, which have been described above, expand them claiming, at the same time, that "it is unrealistic to assume that older persons, any more than younger persons, can cope with their developmental needs *without the benefit of a systematic education programme* " (my italics). Foisting an ordered programme on the elderly is supported by Krupp (1995) when she asserts that success in life goes to the older person who can manage developmental, situational and discontinuous change *assisted by the educator.* Glendenning & Battersby (1990) seem to agree when they suggest that educators should develop sound theories before devising educational programmes which will enable the elderly to gain power over their lives. Heppner (1994a, p.6) when outlining the background to the formation of U3A states:

> "Educationalists and others are becoming aware that older people's participation in learning activities has a significant role in improving their quality of life. Lifelong learning has also been welcomed by **some** older citizens as a means of increasing their sense of satisfaction and fulfilment."

The knowledge gained and used by these writers, it would seem, is hypothetical rather than empirical. This study, which is the opposite, seems to show that, even without the various procedures seen by educators as necessary, older adults have the capacity to cope with their needs and with the acquisition of knowledge in a variety of ways in which their experience, their *know-how,* is a most important factor.

It has already been stated that this study is limited to a group who live in their own homes and in which all but one person are physically active. It could be assumed that the least active and those who suffer the emotional and mental disabilities which stereotypical elderly suffer from have been removed from this environment and are to be found in rest homes and the like. Although that group is not the subject of this study the empirical researches of Hagberg, Samuelsson, Lindberg & Dehlin (1991) suggest that there is a winnowing out of the emotionally unstable and Hayslip & Panek (1993) agree that there is a form of

survival of the fittest, using the term in a psychological rather than biological context.

Thus there emerges a population of older people at large who are at least as aware of their needs as younger people; who have the time and experience to cater for those needs; who use a methodology which suits them but which may be less structured than that which others perceive as being necessary.

The learning procedures already adduced from this study - an interest leading to some form of learning which in turn leads to further learning, practice, discussion and sharing - support the notion that older adults tend to gain and use their knowledge in a more creative, self-motivated and self-controlled mode than has been supposed.

Learning opportunities created specifically for the elderly are, *for the majority,* neither wanted nor warranted.

In discussing organised learning, Glendenning and Battersby (1990, p.42) ask, "Whose interests are really being served through education for older people?" and suggest that the answer in the United States of America, and steadily growing in Great Britain and Australia, is "those who are involved in the flourishing education industry". The elderly merely supply the money!

The majority of the sample of older adults in this study do not use an education organisation designed for them. It can be argued that this study centres on a group of older adults who live in a favoured area, one which has facilities for retirees not generally found in other parts of New Zealand. However when the wide range of organisations which these people use to facilitate learning, both formally and informally (Tables 8, 17 and 19), are looked at carefully it can be seen that almost all were established for younger age groups and are available nationally. U3A is the only learning organisation set up specifically for retired people used by this group. So community and national

learning provisions which are generally available to all adults would appear to satisfy the learning needs of these elderly. It is interesting to note the contrasting situation in Christchurch where younger adults wished to take part in Roth's *Knowledge in Retirement* programme (Roth, 1975) which had been designed for older adults.

Although no evidence is available, it could be that older adults prefer to mix with younger people when participating in learning programmes. A case could also be made for the necessity for younger people to mix with older adults so that negative stereotypes can be minimised, and where better than being involved together in learning experiences?

The wide range of subject matter together with the accompanying assortment of necessary learning facilities engaged in by such a small group would indicate the extent of the establishment needed by a larger number if this age group was to be catered for separately from the general population throughout the country. Battersby (1985) suggests that any form of education for the elderly has to be devised for a wide spectrum of people. It would seem then that the availability of types of learning generally available to all adults and the size of the necessary facilities if only the elderly are to be catered for mean that special provision of an educational organisation for the elderly is not only unnecessary but completely unfeasible.

7 - Conclusion

Within the framework of learning, of educational gerontology, this study set out to expand current knowledge of the attributes and participation rates of elderly New Zealanders.

It was discovered that the body of knowledge about the learning of New Zealand elderly is extremely small. Some researchers, such as Battersby, use overseas findings which they consider could be relevant to New Zealand. However the validity of such studies to the New Zealand situation needs confirmation. Many personality studies about the elderly have been conducted using samples taken from nursing homes and the like (Brubacher & Powers, 1976) and it is probable that similar samples would have been used in overseas learning studies. This supposition was supported in part by Glendenning (1985, pp. 10-11) who also pointed out that such studies referred to approximately 5% of the elderly populations in both Britain and the United States of America who live in residential institutions.

To gain data that would be more appropriate, it was decided that this study would seek to gain information from two groups of those who form the majority of the elderly - non-institutionalised older adults. One group was to be representative of older bowling club members. The other group was to be a control group from retirees within the same district. However because of the small number of respondents the two samples were combined. It is important to note that the only method for distinguishing members of the two groups is the choice of bowls as a sport.

Other researchers, such as Tobias, base their work on relevant material from the few empirical studies carried out in New Zealand such as that commissioned by the New Zealand Department of Education in 1978. Information about the elderly was incidental to the main thrust of that study which was intended to gain information about the complete range of New Zealand adults. This knowledge was considered to be

essential in arranging pertinent Continuing Education courses in the future. With the massive restructuring of society, particularly in the education and health fields, which has been proceeding in this country over the past decade, the findings, as reported by Bird & Fenwick (1981), now need to be amended, especially as far as the elderly are concerned.

Although reference was made to other means of acquiring knowledge Bird & Fenwick (1981) focussed their investigations on formal courses. Restricting evidence of further learning to participation in formal courses seems a very narrow conception of learning. Consequently, in this present study a wider range of information, such as other types of learning situations and affiliations to organisations and sports bodies, was thought to be essential if Tobias' conclusions were to be validated.

Conventional thinking appears to assume that learning amongst adults, and particularly older adults, is elitist, the prerogative of those who are already knowledgeable and who, being relatively wealthy, can afford to participate (Boshier, 1980; Heppner, 1994a; Sissons & Law, 1983; Tobias, 1991b). Because this assumption was initially shared by this researcher it was thought that this study would provide further supporting evidence. It was also supposed that the idea of specialists being needed in furthering the concept of "lifelong learning" (Garland, 1994; Glendenning, 1989; Phillipson, 1989; Radcliffe, 1985; Russell, 1993) was correct even although Boshier (1980, p.5) had pointed out:

> "At all levels of the education system, programmes have been designed by experts. Sometimes they have little regard to the peculiar needs, interests and motives of clientele in particular areas. There are only isolated attempts to nurture widespread and active public participation in the design and management of learning experiences."

It can be argued that the sample used in this study represents an atypical population of the non-institutionalised elderly. However the data does not appear to support an elitist label for this group. It comprises members from most occupational levels, although the majority have an income of less than $20,000, and respondents have a wide range of educational backgrounds. The information provided by this sample can therefore be used as representative of the non-institutionalised elderly in New Zealand in 1997. It has been said that in large cities, for example Auckland, retired people tend to be more isolated and, consequently, lonelier than the sample used in this study. Some form of research similar to this in areas such as that would therefore seem to be needed.

From their level of activity it can be seen that members of this sample are amongst those whom Neugarten (1968) labels "young-old". They are members

> "... of the large majority of persons over 65, [who] although retired, are vigorous and competent people, active in their families and communities, persons who have coped successfully with the transitions of the second half of life" (p.209) "... people like everybody else, with problems and pleasures, weaknesses and strengths, failures and triumphs" (p.215).

The findings from this study tell a different story about educational gerontology than is usually presented. The data suggest that because experts have been unaware of the actualities of retirees when suggesting programmes they are trying to make provision for needs which are already being met. They are unaware that a large proportion of the elderly have sufficient expertise and experience to organise themselves. The myth of expertise amongst those who are involved in the field of educational gerontology has previously hidden what this study suggests.

The elderly participate in learning activities which best suit the needs that they, not others, perceive they have. Many use structured

courses, formal and/or informal, to gain information about some interest. Having acquired the required knowledge or attitude no further courses are taken until further learning is wanted. It can be inferred that the knowledge thus gained enables them to gain mastery of their interests and to share such expertise with others. Some take part in learning activities for the sake of learning. These tend to be amongst those who participate in formal courses. It can be supposed that there are other learning patterns but this study failed to suggest them.

The associations of income, past occupations, gender, age and educational background with educational participation were not found in this study. However the finding of less participation by those whose previous occupations required less use of reading and writing could be linked to attitudes towards the various types of learning. When deciding to continue learning it is logical to assume familiar methods would be used. But this study found many exceptions to this idea.

From the results it could be concluded that the majority were using various methods of learning, even if they were simply remaining aware of current happenings through reading the newspaper.

A large number of already existing organisations with some learning or teaching component were being used. These included polytechs, community colleges, W.E.A., universities, U3A, and social clubs. As in the main these are organisations which were set up for all adults, particularly recent school leavers, this evidence suggests that there is little need for educational strategies designed especially for those over sixty. All the same, caution is needed when making such an assertion for it could be that if more appropriate institutions were set up further unimagined needs would surface.

In spite of these conclusions there are several aspects of the study which did not provide clear explanations. It seems that the nature of the questionnaire is such that respondents did not supply full answers

to several questions thus taking away some of the strength of the findings. For example, it had been hoped to provide a clear, year by year summary of the number and subjects of courses undertaken by respondents since they had their sixtieth birthday. This was impossible as insufficient detail was given by respondents. Similarly, it seems probable that the question concerning informal learning was not completely understood. These two shortcomings have caused the figures for learning situations of all types and for participation in the last year's course to be conservative.

Two important issues raised by Bird & Fenwick (1981) were omitted from this study. Suggestions from respondents regarding their preferred methods of gaining knowledge in a structured way were omitted. The examples given by Bird & Fenwick (1981) include classes, private lessons, discussion groups, mail, talks, television and radio. Preferred methods of learning about their interests could also have been included. Bird & Fenwick (1981) suggest that preferred methods include help from others, classes, teaching oneself, private lessons, other learners, discussion, correspondence and talks. These aspects of learning could well have been supplemented by information about the need for and the efficacy of the various types of learning in which respondents had been involved.

Whether better quality information would be gained using an interview methodology could be trialled. Using the questionnaire in such a way may have obviated some of the deficiencies of the study. It was rejected, however, partly because of the time factor, but also because the questionnaire gave respondents the opportunity to give information through an obviously confidential system.

This study suggests that a straightforward comparison of the elderly and younger adults' formal course participation rates provides conclusions which are virtually meaningless because there are other types of learning experience that should also be taken into account. The older adults have the opportunity to use forms of learning which are not necessarily used by those still in employment. Also the elderly learn

because of an internally felt need to learn rather than, as for many younger people, an externally imposed regime. A study comparing older and younger adults is needed to confirm such a suggestion.

At present community and adult learning opportunities and facilities are available for the elderly. Whether this sample of sixty-nine is a fair representation of the local elderly population or not the study demonstrates that there is a need for all these avenues for adults' learning to be kept open and available to all adults including the elderly. Not only would separate facilities for different adult age groups be uneconomic, they are unnecessary while present institutions teach the wide range of subject matter and skills which this study has shown are both wanted and available. Thus the elderly can share with others in learning experiences, avoiding the segregation that can otherwise ensue (Brubacher & Powers, 1976). Because many of the elderly using these facilities have National Superannuation as their sole source of income it follows that the cost of tuition and equipment must be kept at a reasonable level for access to remain available.

Withnall & Percy (1994, p.166) suggest:

> "It may be that we need a more sophisticated research agenda in order to re-formulate some of our long-held assumptions about later life and to address those issues where our knowledge base is still inadequate."

This study is a beginning.

Appendix One - The questionnaire

This questionnaire is designed to help discover what relationships there are between the past and present background of older adults in New Zealand and their learning involvements since their sixtieth birthday.

Overseas research indicates that in the normal healthy adult intelligence and ability to learn do not deteriorate with age. It also suggests that few older people take advantage of learning situations. However, in my opinion the latter finding is seriously flawed. I am hoping to demonstrate this in a thesis for Massey University and need your help in accumulating data.

The greater the number of people who take part the more accurate the statistics which will be derived from it become. Your help is important.

The responses of each individual person will remain absolutely confidential but if there are personal details you would rather not divulge draw a line through the particular question(s) but your answers to questions 1, 2, 8, 9, 10, 13, 14, and 15 are very important.

Thank you very much in advance for giving up some of your time to take part in this survey. Your assistance is very much appreciated. Results will be made available later in the year.

Please *do not* include your name or address.

Responding is completely voluntary.

If there is insufficient space for answers please use the back of page 4.

Background.
(In this section please mark **all** appropriate boxes.)

1. Male ☐ Female ☐

2. Age: 60 - 64 ☐ 65 - 69 ☐ 70 - 74 ☐ 75-79 ☐
80 - 85 ☐ 85 - 89 ☐ 90 - 95 ☐ 95+ ☐

3. Marital status:
Married or remarried ☐
Widowed ☐
Separated or divorced ☐
Never married ☐

4. Housing:
Live in own home ☐
Live in rented home ☐
Live with relatives ☐
Live in retirement village ☐
Live in home for elderly ☐
Other - please explain:.....
.....
.....

5. Income: (Do not include spouse's or partner's income)

Less than $10,000 ☐ $10,000 - $19,999 ☐ $20,000 - $29,999 ☐
$30,000 - $39,999 ☐ $40,000 - $49,999 ☐ $50,000 or more ☐

6. Type of occupation(s) mainly engaged in prior to 60 birthday?
i).....
ii).....
iii).....
iv).....
v).....

7. Tick if you served in the armed forces in the second world war ☐

8. Educational Background: (Mark all of your qualifications.)

Sixth standard certificate or proficiency	☐	Public Service Exam	☐
School Certificate or T.C.Entrance	☐	Matric, or University Entrance	☐
University Diploma	☐	University Degree	☐
Trade Certificate	☐	Advanced Trade Certificate	☐

Other educational qualifications, including those obtained overseas (please name) .....

.....

.....

Occupations since turning sixty

9. List any service, aid, social, church or cultural groups to which you belong (please show if you have been a member of the executive or a committee in any group)

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10. List any sports or pastimes you have taken an active part in since age 59. Please give your approximate age(s) when you began, and, if now not active, when you stopped. (Please show if you have been a member of the executive or a committee in any group.)

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.....

11. Do you use a public library: Frequently ☐ often ☐
seldom ☐ never ☐

12. What do you read regularly?

Newspaper	☐	Magazines	☐	Digest	☐
Racing guides	☐	Short stories	☐	Non-fiction	☐
Fiction	☐	Very little	☐		

13. What types of formal learning courses (ones you had to pay to attend, or purchase) have you been involved in since age 59? (Please give your approximate age when you took part and the type of course, for example: painting; woodwork; journalism; green-keeping.) Please indicate if your answer is *none*.

Night school ☐
Age(s).....
Course(s).....
.....
.....

Polytechnic ☐
Age(s).....
Course(s).....
.....
.....

University ☐
Age(s).....
Course(s).....
.....
.....

Church ☐
Age(s).....
Course(s).....
.....
.....

Any other organisations and courses: (please name)
.....
.....
.....
.....

None ☐

14. Would you please explain briefly why you did, or did not, become involved in courses? If you would have taken part but there were none suitable for you please state what courses you would have liked to have had available.

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15. What informal learning situations (for example: free sportscoaching, self-taught skills) have you used since retirement? Please give your approximate age when you took part.

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16. If you would like to comment on learning and people over 59, or your experiences, please do so below and on the back of this page.

Appendix Two - Summaries of responses

This appendix shows summaries of respondents' answers to the questions contained in the questionnaire.

The first section summarises answers for each question according to the gender of the respondent.

The second section summarises answers for each question according to the age of the respondents.

1. Summary of Answers by Gender

			Men	Women	Total
1	Gender		43	26	69
2	Age:	60 - 64	8	11	19
		65 - 69	15	8	23
		70 - 74	12	6	18
		75 - 79	4	1	5
		80 +	4	0	4
3	Marital status	Married	34	21	55
		Widowed	3	5	8
		Separated	4	0	4
		No answer	2	0	2
4	Housing	Own home	41	24	65
		Rented	1	2	3
		No answer	1	0	1
5	Income	< $10000	6	14	20
		$10000 to $19999	16	9	25
		$20000 to $29999	10	1	11
		$30000 to $39999	3	0	3
		$40000 to $49999	4	1	5
		> $50000	3	0	3
		No answer	1	1	2
6	Occupation	Professional	8	1	9
		White collar	13	10	23
		Trades	12	7	19
		Unskilled	10	8	18
7	Education	(i)	7	12	19
		(ii)	13	12	25
		(iii)	13	1	14
		(iv)	5	0	5
		(v)	5	0	5
		No answer	0	1	1

			Men	Women	Total
8	No. of groups	Nil	13	7	20
		1	13	6	19
		2	6	3	9
		3	6	2	8
		4	1	3	4
		>4	0	2	2
		No answer	4	3	7
9	No. of sports	Nil	1	2	3
		1	15	10	25
		2	15	10	25
		3	8	1	9
		>3	3	2	5
		No answer	1	1	2
10	Library use	Frequently	10	9	19
		Often	8	6	14
		Seldom	15	5	20
		Never	10	6	16
11	Reading	Newspaper	42	24	66
		Magazines	24	19	43
		Digest	10	8	18
		Short storie	7	9	16
		Non-fiction	19	13	32
		Fiction	21	16	37
		Very little	0	0	0
12	Courses	Participate	10	9	19
		Don't	33	16	49
		No answer	0	1	1
13	Informal learning	Participate	20	13	33
		Don't	6	4	10
		No answer	17	9	26

2. Summary of Answers by Age

			60-64	65-69	70-74	75-79	80+	Total
1	Gender	Male	8	15	12	4	4	43
		Female	11	8	6	1	0	26
2	Age:		19	23	18	5	4	69
3	Marital status	Married	18	17	15	2	3	55
		Widowed	0	3	2	2	1	8
		Separated	1	2	0	1	0	4
		No answer	0	1	1	0	0	2
4	Housing	Own home	18	22	17	5	3	65
		Rented	1	1	1	0	0	3
		No answer	0	0	0	0	1	1
5	Income	< $10000	6	9	4	0	1	20
		$10000 to $19999	8	6	8	2	1	25
		$20000 to $29999	1	5	1	3	1	11
		$30000 to $39999	0	0	3	0	0	3
		$40000 to $49999	1	2	1	0	1	5
		> $50000	2	0	1	0	0	3
		No answer	1	1	0	0	0	2
6	Occupation	Professional	1	3	3	2	0	9
		White collar	7	8	5	2	1	23
		Trades	6	5	5	1	2	19
		Unskilled	5	7	5	0	1	18
7	Education	(i)	4	10	4	1	0	19
		(ii)	11	5	6	2	1	25
		(iii)	3	2	7	0	2	14
		(iv)	0	3	0	1	1	5
		(v)	1	2	1	1	0	5
		No answer	0	1	0	0	0	1

			60-64	65-69	70-74	75-79	80+	Total
8	No. of groups	Nil	6	7	6	0	1	20
		1	6	3	6	2	2	19
		2	3	3	2	1	0	9
		3	1	4	1	1	1	8
		4	0	2	1	1	0	4
		>4	1	1	0	0	0	2
		No answer	2	3	2	0	0	7
9	No. of sports	Nil	1	2	0	0	0	3
		1	9	4	9	3	0	25
		2	4	10	7	1	3	25
		3	3	3	1	1	1	9
		>3	1	3	1	0	0	5
		No answer	1	1	0	0	0	2
10	Library use	Frequently	4	4	8	2	1	19
		Often	4	6	2	2	0	14
		Seldom	6	6	5	1	2	20
		Never	5	7	3	0	1	16
11	Reading	Newspaper	17	22	18	5	4	66
		Magazines	13	15	11	3	1	43
		Digest	2	9	5	2	0	18
		Short stories	6	4	4	1	1	16
		Non-fiction	10	11	7	2	2	32
		Fiction	11	13	11	1	1	37
		Very little	0	0	0	0	0	0
12	Courses	Participate	6	8	2	2	1	19
		Don't	12	15	16	3	3	49
		No answer	1	0	0	0	0	1
13	Informal learning	Participate	10	12	7	3	1	33
		Don't	2	4	3	1	0	10
		No answer	7	7	8	1	3	26

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