Forum / Tribune

Creative Retirement: Survey of Older Adults' Educational Interests and Motivations

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Abstract

The University of Manitoba's Continuing Education Division (CED) and Creative Retirement Manitoba (CRM) formed a partnership to promote applied research on lifelong learning and older adults, to develop new and to complement existing educational activities, and to explore new program models and instructional methods to meet the educational needs of older adult learners. A survey, the first in a larger research project of this partnership, was undertaken to identify the learning interests and motivations of a select group of active older adults who participate in CRM's activities. The results indicate that these learners

- prefer to learn only for interest, in non-educational settings or on their own;

Résumé

La Division de l'Éducation permanente (DÉP) de l'Université du Manitoba et Action Retraite Manitoba (ARM) ont formé un partenariat pour promouvoir la recherche appliquée sur l'apprentissage continu et les personnes âgées, pour développer de nouvelles et compléter d'anciennes activités pédagogiques, et pour étudier de nouveaux exemples de programmation et de méthodes pédagogiques pouvant s'adapter aux besoins pédagogiques des apprenants adultes âgés. Un sondage, le premier provenant d'un grand projet de recherche de ce partenariat, fut entrepris afin d'identifier les intérêts d'apprentissage et les motivations d'un groupe composé de personnes âgées participant activement aux activités d'ARM.

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- are interested, motivated, and physically and financially capable;
- confront situational and institutional barriers to learning; and
- consider learning important to their lifestyle.

These findings are consistent with the notion that an active lifestyle, including continued learning, may lead to improved quality of life, and better health and wellness for older adults. University continuing education (UCE) has a role to play in developing and supporting learning opportunities and programs for older adult learners, albeit a measured one.

Les résultats indiquent que pour ces apprenants :

- apprendre par intérêt et dans un milieu non pédagogique ou indépendamment est préférable ;
- l'intérêt, la motivation et les capacités physiques et financières sont présentes ;
- des obstacles organiques et de contingence à l'apprentissage sont affrontés ; et,
- l'apprentissage a une place d'importance dans leur vie.

Ces résultats correspondent à la notion qu'un style de vie actif, y comprenant l'apprentissage continu, peut donner aux personnes âgées une meilleure qualité de vie, une meilleure santé et le mieux-être. L'éducation permanente universitaire (ÉPU) a un rôle à jouer dans le développement et dans l'appui des opportunités et des programmes d'apprentissage pour des apprenants adultes âgés, même si ce n'est que de façon limitée.

Introduction

Creative Retirement Manitoba (CRM)—established as an educational, cultural, recreational, and health promotion program for seniors by seniors—offers creative challenges, intellectual stimulation, pleasure in learning, and mastery of new skills to a large number of basically healthy people retiring from the workforce (Fleming, 1986). Located centrally in the downtown area of Winnipeg, CRM, provides a number of learning opportunities that may be defined as non-formal learning, including educational programs on topics of humanities, computer technology, science, and health and wellness.

For purposes of this research, continuing learning includes:

1) informal learning (i.e., knowledge, skills, and attitudes acquired through the experience of daily living);
2) non-formal learning (i.e., knowledge, skills, and attitudes acquired in systematic, organized, educational activities outside the formal education system);
3) formal learning (i.e., knowledge, skills, and attitudes acquired from institutionalized, formally evaluated, hierarchical educational systems) (Jarvis, 1985); and
4) self-directed learning projects (i.e., knowledge, skills, and attitudes acquired through a major learning activity independently conducted in a deliberate and sustained manner for one's own benefit) (Tough, 1971).

There is little knowledge of how older adults define and understand learning and education in later life, what value they place on continuing learning, and what outcomes learning might have in the context of their lives (Withnall, 2002). At another level, questions remain with regard to the implications for social and educational policies for learning in later life. It seems that a first step in the research is to create a participation database related to these older adults and lifelong learning activities that will be useful for further research and practice.

Related Literature

Retirement is a fairly new concept having come into existence in the 20th century. Contrary to the adult education literature that suggests that participation in formal educational programs by older adults, regardless of educational level, declines with age (Merriam & Caffarella, 1999), today's older adult learners are significantly different from those of 20 years ago.

Retirement and Older Adults

In the past, retirement was often seen as synonymous with the gradual cessation of any and all activities. Retirees were expected to be plagued by illness and disability, and to become a burden on caregivers and society, and a cost to taxpayers. Retirement was believed to create difficulties, particularly as retirees grew older; provide no new roles to replace those lost by retirement; exclude the elderly from mainstream life; and reduce social contacts and status (Denton, Feaver & Spencer, 1998; Novak, 1997). These stereotypes have influenced policies and practices regarding older adults. The more recent thinking regarding creative retirement for older adults considers the phenomenon of a large, basically healthy group of older adults retiring

from the workforce who want creative challenges, intellectual stimulation, to master new skills, and to contribute to their communities (AARP Survey on Lifelong Learning, 2000; Thompson & Foth, 2002; William & Montelpare, 1998).

Participation in Educational Activities

Withnall (2002) suggests older people enjoy learning, welcome more informal learning methods, get intellectual stimulation from learning, cope better with constant societal change as a result of learning, and enjoy better health when they are stimulated by continued learning. The AARP Survey on Lifelong Learning confirms that older adult learners, regardless of age, gender, income, or education, typically learn from newspapers, magazines, books, and journals (those interviewed online typically use online learning techniques). These older learners indicate:

1) they prefer hands-on methods, watching, listening, and reflecting;
2) they learn for the joy of learning and to keep in touch with others in the local community and beyond;
3) they want to improve the quality of their lives, their current skills, and their health;
4) they prefer varied learning formats including groups, workshops, and self-directed methods; and
5) they want to immediately use their skills, control the content and the learning process, and invest small amounts of time and money for their learning (p.5).

Motivation and Barriers to Participation

Motivation to participate in education is understood in terms of its observable effects (i.e., persistence and purposeful actions) and may come from internal or external sources (Covington, 1997; Pintrich & Schunk, 1996; Svinicki, 2000). Perspectives that help to explain learners' motivation include the achievement need theory and the attribution theory. Cross's (1981) framework of participation draws on both the achievement and the attribution theories of motivation. The decision to participate in education is seen not as a single act, but as the result of a chain-of-response. In this framework, each response is seen as being based upon an evaluation of the position of the individual in the context of his or her environment. Forces that assist or impede participation include self-concept, attitudes toward education, importance of goals, expectation that participation will meet goals, life transitions, previous opportunities and obstacles, and access to information.

In Cross's framework, barriers that adults encounter in education can be categorized as dispositional, situational, or institutional. Dispositional barriers include fear of being too old and lack of confidence in skills and abilities. Situational factors include finances, conflicting demands of work and family, and lack of support from friends and family. Institutional factors include rigid admission criteria, requirements for full-time attendance, inflexible course schedules, red tape, and legalistic language. Cross's framework does not address cultural and systemic issues such as ageism and sexism, or the politics of education. Efforts to encourage participation in learning normally begin with the removal of barriers and the provision of opportunities. Institutional responses have typically focused on increasing opportunities without the necessary removal of obstacles. As a result, these efforts have done little to make education more accessible for population groups such as older adults and women.

There is a dearth of research on learning activities of older adults, little information on their demographic characteristics, little or no evidence to support the benefits of these activities, and little information on their learning over their lifespans. The first phase of this research was intended to contribute to our knowledge and to answer basic questions regarding older adult learners who participate in CRM's activities: Who participates in these educational activities? What motivates their participation? What are the benefits and barriers to their participation? In what types of educational activities do they participate? Answers to these questions will provide some direction for future research and practice, and may be helpful in designing programs that lead to improved quality of life, as well as overall health and wellness of older adults.

The Study

The University of Manitoba's Continuing Education Division (CED) and Creative Retirement Manitoba (CRM) undertook a survey, the first in a larger study, to investigate the learning interests and motivations of a group of active older adult learners who participate in CRM's educational programs. Specifically, the research explored demographic factors, learning methods, motivations, and interests in an effort to help educators and CRM staff understand the value to adult learners of participating in educational activities, and how to more effectively develop learning opportunities for active older adult learners.

Population and Sample

Given that respondents were selected from among those who participated in the programs offered through CRM, they were by definition active older

adult learners. The study involved a structured survey with a range of active respondents who were attending a variety of educational activities, including computer technology and humanities-type programs offered in 2002-03. In total, there were 967 older adults accounting for 1,627 registrations in CRM programs. A convenience sample was designed; that is, the Program Manager went to the computer and non-computer classes that were being offered, discussed the survey, and invited the adult learners to participate. There were 336 adult learners taking these classes, however, only 286 agreed to complete the surveys. The data set is comprised of responses from 227 useable surveys (i.e., 109 respondents from computer classes and 118 from non-computer classes), representing a response rate of 79%.

Method

Survey methodology was used to collect the data (Babbie, 1995; deLeeuw, 1992). The survey instrument contained structured items designed to gather demographic data and information related to learning experiences, interests, and motivations. A number of items were drawn from two existing survey instruments (AARP, 2000; Lamdin & Fugate, 1997). It was necessary to modify items to take into account the particular Manitoba context. Those who agreed to participate were given directions on how to complete the surveys using the computerized score sheet.

Data analysis

The survey instrument comprised three parts:

1) demographics (e.g., gender, age, marital status, educational background, income, and residence);
2) retirement status and participation with CRM (e.g., involvement with CRM, health, wellness, modes of transportation to classes, and volunteer work); and
3) learning experiences (e.g., content, motivation, barriers to learning, learning preferences, resources, organizations, and benefits of learning).

In the interest of space, data from parts 1 and 3 only will be reported in this paper.

The instrument was pre-tested with five people comparable to those in the sample and a number of questions were modified as a result of the feedback received. Data were collected in the 2002-03 fall and winter terms, coded, and analyzed using a computerized system.

Findings

The data are reported at the aggregate level and are discussed in two sections corresponding to demographics and learning experiences. There were a number of non-responses so the percentages do not always add up to 100%.

Demographics

Demographic data served to provide a profile of active older adult learners in the study. Data included information on gender, age, marital status, educational level, income, and residence. The responses to these questions are summarized below.

Table 1: *Gender*

Gender	Non-Computer	Computer	Both groups
Male	32% (35)	32% (38)	32% (73)
Female	66% (72)	63% (74)	64% (146)

With respect to age and marital status, the majority of respondents (66%) were 60 to 74 years of age; a small number (21%) were 75 to 85+ years of age; 53% were married; 30% were separated, divorced, or widowed; and 15% were single (i.e., never married).

Table 2: *Education Level*

Educational Level	Non-Computer	Computer	Both Groups
Less than grade 9	-	1% (1)	0.4% (1)
Some high school (grades 9 to 12)	5% (5)	11% (13)	8% (18)
High school graduate	8% (9)	9% (11)	9% (20)
Some community college or university	18% (20)	25% (29)	22% (49)
Community college or university graduate	66% (72)	48% (57)	57% (129)

Table 3: *Income Level*

Income Level	Non-Computer	Computer	Both Groups
Less than $10,000	-	1% (1)	1% (1)
$10,000–$19,999	7% (8)	4% (5)	5% (13)
$20,000–$29,900	12% (13)	17% (20)	14% (33)
$30,000–$39,999	19% (21)	19% (22)	19% (43)
$40,000–$49,999	18% (20)	11% (13)	14% (33)
$50,000–$59,999	12% (13)	15% (13)	14% (31)
$60,000–$69,999	5% (6)	8% (9)	7% (15)
$70,000 or more	16% (17)	13% (15)	14% (32)

Respondents resided throughout the city. The majority of respondents (73%) reported that they lived in the more affluent parts of the city. However, 18% lived in the core area or less affluent part of the city, and 3% resided outside the city.

Learning Experiences

Respondents were asked a number of questions about education/learning experiences, including what they learn, motivation and barriers to participation, learning preferences, learning resources used, where they learn, and extent/amount of learning activities. The responses to these questions are summarized below.

Table 4: *Topic Areas of Interest*

Topics of Interest	Non-Computer	Computer	Both Groups
Technology	41% (45)	63% (75)	52% (120)
Arts	46% (50)	56% (66)	51% (116)
Leisure	45% (49)	52% (62)	48% (111)
Health	42% (46)	51% (60)	46% (106)
Literature	60% (66)	30% (36)	45% (102)
Personal Development	43% (47)	45% (53)	44% (100)
Humanities	49% (54)	34% (40)	41% (94)
Finance	18% (20)	39% (46)	28% (66)
Sciences	24% (26)	18% (21)	21% (47)
Other	5% (6)	6% (7)	5% (13)

Table 5: *Motivation for Learning*

Motivation	Non-Computer	Computer	Both Groups
Joy of learning	83% (91)	72% (85)	77% (176)
Pursue interest/ hobby	72% (79)	74% (88)	73% (167)
Learn new skill	43% (47)	72% (85)	57% (132)
Meet/socialize	36% (39)	31% (37)	33% (76)
Fill time productively	33% (36)	30% (36)	31% (72)
Fill gaps in education	28% (31)	33% (27)	25% (58)
Deal with life event	6% (7)	12% (14)	9% (21)
Help in career/job	7% (8)	8% (10)	7% (18)
Fill community service	4% (4)	8% (9)	6% (13)
Other	1% (1)	2% (2)	1% (3)

Table 6: *Barriers to Learning*

Barriers	Non-Computer	Computer	Both Groups
Not enough time	48% (52)	58% (68)	53% (120)
Insufficient offerings	29% (32)	23% (27)	26% (59)
Lack of information	27% (29)	24% (29)	25% (58)
Program too expensive	20% (22)	19% (23)	19% (45)
Lack of motivation	13% (14)	19% (22)	16% (36)
Fear of technology	11% (12)	13% (16)	12% (28)
Lack confidence	6% (7)	17% (20)	11% (27)
Lack transportation	10% (11)	7% (8)	8% (19)
Physical disability	6% (7)	2% (2)	4% (9)
Other	5% (6)	7% (8)	6% (14)

Table 7: *Learning Preferences*

Prefer to Learn . . .	Non-Computer	Computer	Both Groups
Hands on	56% (61)	79% (93)	67% (154)
In a group	69% (75)	59% (70)	64% (145)
In a formal class setting	60% (65)	55% (65)	57% (130)
By watching & listening	39% (43)	34% (40)	36% (83)
With mentor/tutor	34% (37)	36% (43)	35% (80)
Self-directed	19% (21)	24% (29)	21% (50)
Self-study courses	6% (7)	10% (12)	8% (19)
Other	4% (4)	3% (3)	3% (7)

Table 8: *Learning Resources*

Resources	Non-Computer	Computer	Both Groups
Classes, seminars, etc.	84% (92)	77% (91)	81% (183)
Read newspaper , etc.	82% (89)	66% (78)	74% (167)
Friend or tutor	36% (39)	49% (58)	42% (97)
Informational TV, etc.	45% (49)	30% (35)	37% (84)
School, community college/university	35% (38)	40% (47)	37% (85)
Community group	36% (39)	24% (29)	30% (68)
Public events	38% (41)	19% (22)	28% (63)
Internet	28% (31)	27% (32)	27% (63)
Trial & error	18% (20)	26% (31)	22% (51)
Other	1% (1)	1% (1)	1% (2)

Respondents were also asked to indicate where they attended educational programs. Topping the list were libraries (52%), museums and galleries (40%), and church study groups (34%). Universities and colleges were lower on the list with 19%.

The majority of respondents (75%) had not taken any courses for credit in the past two years, however, 66% of respondents had taken one to six non-credit courses (for interest only) in the past two years. With respect to time spent in formal and informal or self-planned activities, 63% of respondents reported spending six to 20 hours per month on sponsored learning activities while 59% spent six to 20 hours per month on informal or self-planned activities.

Finally, respondents were asked about the importance of education and retirement. Less than 3% of respondents said that educational opportunities were unimportant in their retirement with the overwhelming majority (81%) endorsing the importance of learning in retirement.

Discussion

Although generalizations cannot be made from this on-going study, a number of observations can be made to connect the data to the literature and continuing education practice.

Demographics

The typical respondent in this study is a highly personal development–oriented, motivated, active, healthy, married woman between 60 to 74 years old. She is likely more educated than her counterpart in the computer classes, having completed community college or university education. She has an income of $30,000 to $59,999, has been retired for nine or more years, lives in an affluent neighborhood, drives her own car, has participated in CRM offerings for one to six years, and does volunteer work. More women continue to participate in educational activities, which is consistent with the literature (Statistics Canada, 2000).

This group of active adult learners appears to have limited or no physical disability. They are active in their communities, and the majority drive their own vehicles or are otherwise mobile. All of these factors may affect their time and scheduling flexibility to participate in educational activities.

These data are consistent with the picture presented of older adults in the current literature (AARP, 2000; Thompson & Foth, 2002), particularly with reference to the aging baby boom generation who are reported to be active, healthy, educated, and wealthy. Furthermore, increased education and training leads to increased participation in educational activities, and improvements in mental, spiritual, and physical well being (Ebersole & Hess, 1990).

Learning experiences

The group of older adult learners surveyed has a wide range of learning interests and motivation for learning, although some topic areas clearly are of more interest. On average, technology, arts, and leisure ranked highest for respondents, however, those enrolled in the non-computer courses appear to be more interested in literature, arts, and humanities, while those in the computer courses seem to prefer technology, finance, and science. All respondents seem to be equally interested in leisure, health, and personal development. Respondents appear to be learning-oriented and goal-oriented learners (according to Houle's 1961 typology of reasons for participation in learning), while activity-oriented reasons for learning are less important. This tends to be counter-intuitive as older (retired) adults are thought to have "time on their hands" and, in some cases, be isolated and alone—reasons for participating in learning to meet other people and fill the time

void. Even though learning- and goal-oriented, this group of learners is not focused on learning to enhance a career (second career) in order to continue to work in retirement.

Barriers affect a person's ability to participate in learning activities. Cross' classification, discussed earlier, is helpful in examining participation of these older adult learners (Cross, 1981). By identifying and addressing barriers, one can potentially increase participation in learning activities. The single most important barrier identified by respondents relates to their situation, specifically lack of time to engage in learning. As noted above, this group of older learners does not appear to participate in learning to fill time or to socialize. Even those enrolled in non-computer courses do not identify fear of technology as a barrier to participation.

However, time appears to be a limited commodity and must be used meaningfully. Educational planners need to take into account the time that older adult learners may have to devote to educational pursuits to ensure that educational programs offer good value for time spent, otherwise, as is the case with adult learners generally, older adult learners will "vote with their feet" and not participate. The two other barriers noted by respondents (i.e., insufficient offerings and lack of information about the offerings) can be classified as institutional, which means that learning organizations, such as university continuing education units, can modify their practices to address the barriers.

The preferences of respondents to learn in a group and to learn in a teaching/classroom setting suggest that active older learners will readily participate in courses and programs offered by learning organizations. Within these settings, their preference is to be actively engaged in learning with "hands-on" or interactive opportunities. Hands-on learning in a classroom setting is notably the technique of choice for those in the computer courses, while in-a-group setting is the first choice for non-computer learners. For both groups, lack of interest in self-study courses suggests that correspondence/distance education learning may not best serve older adult learners. Even though this group does not participate in learning for social reasons, they appear to prefer to learn in face-to-face situations that offer a relationship aspect to learning.

The less-than-high endorsement of courses at educational institutions may suggest that there is a limited array of courses available, making this option less attractive (this fits with the responses to the question of barriers to learning), or the courses offered by educational institutions are not highly valued (relates to issue of value for time). Another plausible explanation may be perception: older adult learners may perceive courses offered by educational institutions as geared towards younger students seeking degrees and diplo-

mas. Educational institutions need to check these perceptions carefully, and react accordingly to any myths that may exist.

The data suggest that educational institutions may best serve older adults by working collaboratively with non-educational community partners. The responses also indicate a tendency for this group of older adults to learn by watching and listening, and to learn with friends or tutors. As well, it is interesting to note that these active older learners spent more time per month on informal or self-planned learning than formal learning, which parallels the finding of the AARP survey (2000).

The selection of non-educational organizations is consistent with the preference of this group for learning resources. Although this selection emphasizes their preference to learn outside of universities and colleges, these institutions ranked even lower for those enrolled in the computer courses. Generally, however, it is understood that older adult learners do not take courses for credit because they are less in need of or interested in academic credentials. Alternatively, responses may reflect sample bias (i.e., these learners participate in programs offered through CRM by seniors and for seniors).

Conclusion

Overall, the older adult learners surveyed endorsed the importance of learning to their life style, which fits with the notion that an active lifestyle (including continued learning) will lead to improved quality of life, and better health and wellness of older adults. University continuing education has a role to play in developing and supporting learning opportunities and programs for older adult learners, albeit, a measured one. As well, a number of research questions emerged from the study that require further study: How does this group of participants compare with a similar group of non-participants? Would older adult learners have the same motivations, barriers, and interests? How significant is level of education early in life to participation in learning activities in later life? How do older adult learners conceptualize time?

Given the limitation of the sample, further study is warranted to determine if the results are similar for other groups of active older adult learners.

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BIOGRAPHY

Atlanta Sloane-Seale is an associate professor and program director in the Continuing Education Division at the University of Manitoba. Her areas of interest include program planning and development, evaluation, needs assessment, accessibility, retention and attrition of disadvantaged groups (including Aboriginal students and older adult learners), and career progress of women in management.

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