Perceptions of successful ageing and implications for late-life learning

ABSTRACT

This paper draws upon a small-scale investigation to shed light on the perceptions of successful ageing by a group of senior adults in Hong Kong. It also identifies attributes that are associated with ageing well and examines the extent to which education or learning is perceived as important in the ageing process. To this end, the research has taken on an educational perspective to find out what older people themselves want and need to learn, what motivates them and what poses as barriers to their participation in learning. By making such data available, policy makers and educational providers alike will be better placed to understand and determine the role of learning in the ageing process and to plan appropriate interventions in support of late-life learning for and by the elderly.

KEYWORDS

successful ageing, senior adults, Hong Kong, late-life learning, elderly, older learners

SUCCESSFUL AGEING AND LEARNING

As the world is experiencing an unprecedented ageing of its population in both developed and developing countries, one of the challenges for governments is to put in place policies and provisions to enable elders maintain a positive quality of life by ageing successfully. The ageing population phenomenon prevails globally, including in Hong Kong. According to government statistics, the Hong Kong population is graying at a faster rate than anticipated from the current ratio of 13 in 100 citizens aged 65 or above in 2009 to 28 in 100 by 2039 (Census and Statistics Department of Hong Kong Special Administrative Region 2010), constituting an increase by more than a double within a period of 30 years.

So what does it mean by successful ageing and how is it measured? Much of the early literature on successful ageing was based on the biomedical model, which emphasized the freedom from illnesses and diseases in old age. The deficit model of ageing had dominated gerontological research for some decades in the 20th century, which viewed the ageing process as one involving the decrease in cognitive capacity and intellectual ability (Wechsler 1939). It was not until the 1970's that the deficit model was criticized with more attention being drawn to the individual perception of ageing (Thomae 1970). Later, there was even a shift of emphasis from ageing to successful ageing, which was defined by Baltes and Baltes (1990) with broader and more subjective criteria. They put forward a model of "selective optimization with compensation". This model recognizes that an individual's experience of ageing is subjective and unique, and that individuals can optimize their chances of achieving desirable outcomes or goals by choosing activities and interests that suit their abilities and

can compensate for their limitations. Such is a view of coping and a process of continuous adaptation in a bid to age successfully as one gets older.

In fact, the term "successful ageing" has become popular since Rowe and Kahn's article in *Science* (1987), which argued that successful ageing is mainly about the absence of "age-related decrements in physiologic function". But later in 1998, the two researchers forsook this objective view of successful ageing and postulated a three-dimensional model of successful ageing which includes three components: avoidance of disease, maintenance of cognitive capacity and active engagement with life (Rowe and Kahn 1998). Though broader this might seem, the Rowe and Kahn model was still considered to be too restrictive as it looked at "diseased versus normal ageing" rather than "successful ageing" per se (Jorm et al 1998), because those who are mentally active but physically limited or diseased will be as a result excluded from the model of successful ageing.

Adding to the multidimensionality of the definition of successful ageing is the World Health Organization (WHO)'s official definition of active ageing as "the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age" (WHO 2002:12). In this light, successful ageing is a multi-dimensional concept which emphasizes not only the length of life but also its quality (Rowe and Kahn 1998; Strawbridge et al 2002). In the United States, Phelan et al (2004) conducted a study on American senior adults and conceived active or successful ageing as a multi-dimensional phenomenon which includes physical, functional, psychological, and social health. In Australia, two large-scale national studies on active ageing, as reported in Boulton-Lewis (2012), also conceptualized active ageing as a multi-dimensional construct, which is a state of being proactive in keeping healthy, being physically and mentally active, engaging in learning, living in safe communities, working and actively participating in family and community life. Such a view has integrated the aspects of physical, mental, emotional, social and economic well-being, extrapolating the fact that well-being in old age is not confined to physical health, but should include social participation, psychological well-being, lifestyle and activities, financial resources, family and community relationships. On the issue of well-being and its measurement, a few recent studies in Europe have provided some practical ideas of defining and measuring well-being that encompasses multiple dimensions. Although not studying mainly older adults, the research led and conducted by Stiglitz, Sen and Fitoussi for the French government has considered eight dimensions in their attempt to define and measure French people's well-being (Report to the Commission of the Measurement of Economic Performance and Social Progress 2009). These eight dimensions include material living standards, health, education, personal activities including work, political voice and governance, social connections and relationships, environment,

insecurity, of an economic as well as a physical nature. In addition to these objective conditions and capabilities, the Stiglitz, Sen and Fitoussi study (2009) has also taken into account the subjective aspect of defining and measuring well-being or quality of life, in a more holistic sense, by way of asking questions about people's life evaluations, emotions, feelings and experiences. In this light, subjective well-being is conceived to include cognitive evaluation of one's life, happiness, satisfaction, positive emotions such as joy and pride, and negative emotions such as pain and worry. In a similar vein, a study commissioned by the UK Office of National Statistics (ONS) has collected data about the subjective well-being of a large sample of 80,000 adults aged 16 and over from across the UK in 2011 and 2012 (ONS 2012). In the study, subjective well-being was defined and measured with reference to three theoretical approaches: the 'evaluative', 'eudemonic' and 'experience' approach (Dolan et al 2011; ONS 2012). The evaluative approach collects the reflective account by people on their life and a self-assessment of their own well-being. The eudemonic approach measures people's sense of meaning and purpose in life, family and social relationships, sense of control, satisfaction and worthiness. The experience approach focuses on people's positive and negative experiences over a short time frame to shed light on well-being on a day-to-day basis.

The growing literature in defining and measuring well-being, particularly in the context of older adults, has attested to the multi-dimensional nature of the concepts of well-being and successful ageing, yielding a trend to devote greater attention to a broad array of factors that contribute to the maintenance of health and independence through lifestyle choices, quality of life, engagement in activities, and exploring the perceptions of ageing and retirement by way of subjective evaluation (Grant 2008). In summary, the multi-dimensional approach to understanding active or successful ageing has been reflected in the various models and theories used to define and measure the construct, and has resulted in both objective and subjective domains being used in explaining how people age. In broad terms, two main perspectives prevail: one that looks at successful ageing as a state of being, a condition that can be objectively measured at any time; and one that views ageing as a subjective experience where opportunities should be provided for elders to tell what they mean by successful ageing and the underlying factors that they regard as important. The first part of this research is premised on the multi-dimensional and subjective approach to the definition and measurement of successful ageing as adopted by Phelan et al (2004) in their study, with the aim of identifying attributes of well-being that are considered important by the elderly themselves.

In order for the ageing process to be successful, more attention needs to be paid to education in mid and later life. The benefits of continued learning for elders have been

widely known as reported by Tam (2011). Many studies show that learning plays a vital role in maintaining cognitive functioning and capability even in old age (for example, Ardelt 2000; Boulton-Lewis et al 2006; Dench and Regan 2000; Glendenning 1997; Withnall 2000). There is much research evidence to support the view that older adults who are stimulated mentally experience less decline in memory and intellectual ability (for example in Cavannaugh and Blanchard-Fields 2006; Cohen 2001, 2006; Sherman 2006). Learning can also be a rewarding activity in itself, supporting older people to make informed choices about their lives (Tuckett and McAulay 2005), improving the individual's social relations as he/she interacts with, and learns from, others, be they young or old (Ala-Mutka et al 2008). Simply put, older persons benefit from maintaining social connections in many ways through participation in learning.

The second part of this research aims at exploring how older adults perceive the role of learning and education in the process of ageing successfully. Also, it will identify what older people want and need to learn, as well as the barriers to their participation in late-life learning. By identifying older learners' perceptions about the role of education in successful ageing, the purpose is to provide insights into how policy makers, providers and researchers can assist older learners to reap the benefits of participation in education in order to cope better with many ageing issues of later life.

RESEARCH OBJECTIVES

This paper is based on a small-scale research project that aims at exploring elders' perceptions of successful ageing and the centrality of learning in the process of getting old. The research is premised on the notion of successful or active ageing in which learning is believed to play a very important part.

Specifically, the objectives of the research are to investigate:

- How a group of senior adults in Hong Kong perceive successful or active ageing by according importance to the various attributes of successful ageing.
- How well this group of senior adults is ageing in terms of a subjective measure of self-reported experience.
- To what extent senior adults in Hong Kong perceive education or learning to be important in their ageing process.
- What learning needs and interests, as well as, barriers feature among this group of elders in Hong Kong.
- What implications can therefore be drawn for policy and provisions of late-life learning.

With these objectives, the research is intended to contribute to both theory and practice in the international academic field of elderly education by advancing research into the construction of successful ageing and the factors that are associated with ageing well in a Chinese society like Hong Kong; and by casting light on the direction and planning of late-life education for senior adults in Hong Kong.

RESEARCH APPROACH AND METHODOLOGY

This study has employed an approach and design that focused on identifying how participants defined and interpreted their subjective experiences of getting old. Ideas and concepts of successful ageing and the role of learning in it were collected by way of a questionnaire, which is a Chinese translation based on one from the Phelan et al (2004) study. The adaptation of the questionnaire, however, applied only to the first part of the research which was about successful ageing, where a number of 19 items were used to assess the perceptions of how important each of the items to successful ageing was. A scale of 1-5 was used to indicate the extent to which they agreed that each of the statements was important to successful ageing. Another key component in this part of the questionnaire was their overall evaluation of their ageing experience. The question, "how do you evaluate your later life?" served as a self-evaluation of their ageing experience and an indication of the quality of their later-life. The second part of the questionnaire purported to determine the role of learning in the process of successful ageing. Questions were directed towards the impact of learning on the respondents' lives as they age; what they want to learn, and what their needs and interests are; and finally, the barriers to their participation in learning at old age.

Elders invited to participate in this research were a group of 80 participants drawn from two programmes currently offered by the Elder Academy of the Hong Kong Institute of Education. Check out Tam (2012a, 2012b) for information about the Hong Kong Elder Academy Scheme. One of the programmes is made up by the Institute's regular course offerings where a quota of 50 elders aged 60 and above is allowed to take one course per semester by paying a nominal fee. Being in the same course and class with younger Institute undergraduate students, the elderly participants are engaged in intergenerational learning and do not need to take part in any assessment leading to a formal academic award. The other programme is the Professional Certificate in Lifelong and Elderly Education, which is a "train-the-trainer" programme for instructors of elder learners. The programme has enrolled 30 students in the 2010-11 academic year, whose age ranged from 28 to 73, with the majority of whom falling into the age bracket of 55-65.

Both an online and a pen-and-paper questionnaires were distributed to the target group of 80 participants enrolled in the two elder learning programmes. Eventually, 50 completed questionnaires, 24 and 26 from the two respective groups, were returned and received for data reporting and analysis. The small and convenient sample taken from a single institution that offers courses to elderly participants is limiting in that it is unrepresentative of older people in Hong Kong in general, and that it is fallacious to combine the two distinct groups who may have different opinions and views regarding ageing and elder learning. To this end, a series of t-test was run for all questionnaire items to identify any significant differences between the two groups. The t-test results showed that the two groups differed significantly in their responses to only 6 out of 121 items in total.

Question: What do you want to learn?

Item 25: Cultural and historical studies (t = 2.262, sig. =.028)

This item was among the 12 items asked for the respondents to indicate what they wanted to learn. Group A (elderly students enrolled in the elder academy courses) showed a stronger interest in cultural and historical studies than Group B (students from the tutor programme) with the means at 4.21 and 3.77 respectively.

Item 32: Teaching (t = -3.362, sig. = .002)

Not surprisingly, Group B scored a stronger mean at 4.23 as opposed to 3.43 for Group A. Group B are tutors-to-be who no doubt possess a stronger learning interest in teaching.

Question: Why do you continue to learn?

Item 40: To accompany family members or friends (t = 2.083, sig. = .043)

This item was one of the 15 reasons given for continued learning. Group A felt that learning was more like a social activity than Group B (means = 3.35 and 2.73 respectively).

Question: How does learning facilitate successful ageing?

Item 85: Obtain a qualification upon completion (t = -3.162, sig. = .003)

No wonder Group B was aiming at studying for a qualification (mean = 3.64) as they enrolled in an award-bearing tutor training programme. Group A, however, saw this as a less facilitating factor for their learning (mean = 2.77).

Question: What can be done to enhance your motivation to learn?

Item 117: Obtain a qualification upon completion (t = -2.230, sig. = .031)

Similarly, Group A and B differed for the same reason as aforementioned (means = 3.30 and 3.96 respectively).

Item 120: Increase the enrolment quota for elderly students (t= 2.733, sig. = .009)
Regarding this item, Group A showed a stronger response (mean = 4.25) because elderly enrolment is currently limited to a quota of 4 per course and 50 per semester in total. However, students from Group B can be of any age group who therefore did not see the increased enrolment quota for elders a very strong motivator for learning (mean = 3.73).

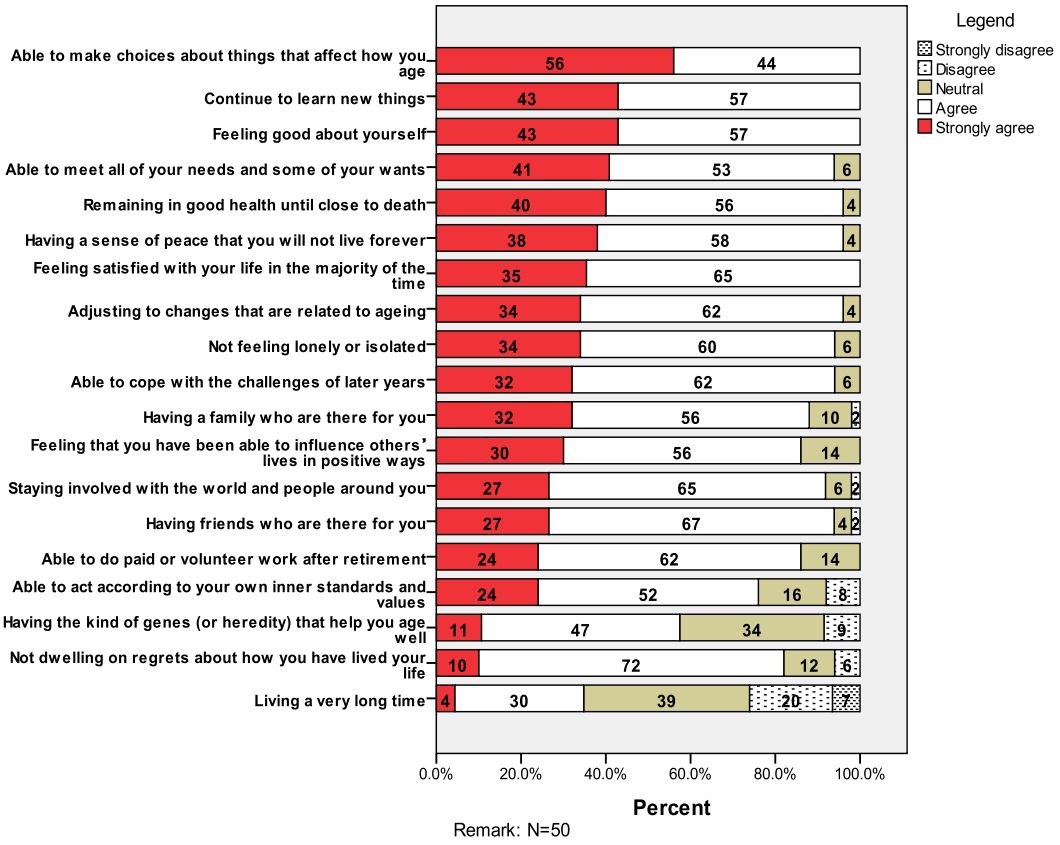
FINDINGS AND DISCUSSION

Attributes of successful ageing

In the questionnaire, participants were presented with a total of 20 items (19 closed and one open-ended) to do with ageing and were asked to indicate the extent to which they think each of the 19 items was related to successful ageing. These questions were adapted from those in a study by Phelan et al (2004), the objective of which was to determine how older adults perceived successful ageing and those attributes that were considered important in the ageing process. As can be seen in Figure 1 below, all but two of the statements (17 out of 19) were either "strongly agreed" or "agreed" by at least 75% of the sample as important to successful ageing.

Question: What is your perception of ageing successfully or ageing well?

Fig. 1 Perceptions of successful ageing (rank order by percentages)



The following four items were either “strongly agreed” or “agreed” as important to successful ageing by 100% of the sample:

- 100% Able to make choices about things that affect how you age
- 100% Continue to learn new things
- 100% Feeling good about yourself
- 100% Feeling satisfied with your life in the majority of the time

There are seven items that were rated by 92-96% of the respondents as important to successful ageing. They are:

- 94% Able to meet all of your needs and wants
- 96% Remaining in good health until close to death
- 96% Having a sense of peace that you will not live forever
- 96% Adjusting to changes that are related to ageing
- 94% Not feeling lonely or isolated
- 94% Able to cope with the challenges of later years
- 92% Staying involved with the world and people around you

Items that were rated by 82-88% of the respondents as important to successful ageing are as follows:

- 88% Having a family who are there for you
- 86% Feeling that you have been able to influence others’ lives in positive ways
- 84% Having friends who are there for you
- 86% Able to do paid or volunteer work after retirement
- 82% Not dwelling on regrets about how you have lived your life

The following three items were either “strongly agreed” or “agreed” by the smallest proportion of respondents:

- 76% Able to act according to your own inner standards and values
- 58% Having the kind of genes (or heredity) that help you age well
- 34% Living a very long time

In this research, 100% agreement was recorded for statements that highlight the importance of those ‘internal factors’ for ageing successfully, including “feeling good about yourself” and “feeling satisfied with your life in the majority of the time”. The result is

attesting to the fact that elders want to have a positive self-image in old age and to live life to the full as they age. Besides, the feelings of being in control and free to make choices are also important to successful ageing. Not surprisingly, all respondents said they wanted to continue to learn new things since they are currently engaged in learning of some sort with the elder academy of the Hong Kong Institute of Education.

Although not scoring one hundred percent, other attributes that are also considered important to successful ageing include “good health”, a feeling of self-sufficiency of being “able to meet all needs and wants”, the ability to “cope with changes and challenges” in old age, the sense of peace that one “will not live forever”, and the feelings of “not being alone and isolated”, as well as “staying involved with the world and people around you”.

It is a bit surprising that this group of respondents did not see social relationships and family important to successful ageing as compared to other attributes that emphasize self-control, independence and self-esteem. Items including “having a family and friends who are there for you” and “feeling that you have been able to influence others’ lives in positive ways” were not as highly rated as expected from Chinese elders who usually value family and social relationships above all other considerations. One possible explanation is perhaps due to the characteristics of this particular group of respondents who are elders actively involved in learning and therefore more inclined to self-dependence rather than dependence on others in their process of getting old. In a similar vein, “doing paid or volunteer work” and “not dwelling on regrets” was considered important, but not very important.

Items considered less important included “living a very long time (34%)”, “having the kind of genes for ageing well (58%)”. Although good health was considered important to successful ageing, living a very long life was not essential. This view of elders was attesting to the fact that quality of life matters more than the sheer quantity of years in one’s later life. A little bit in the limbo was the statement, “being able to act according to inner standards and values (76%)”. This statement was perhaps unclear and rather high-sounding which has a relatively lower rating among others.

Self-evaluation of later life

Question: How do you evaluate your later life?

Here, respondents were asked to self-evaluate their late-life as being “Excellent”, “Very Good”, “Good”, “Quite Good”, “Fair” or “Not Good”. Exactly half of the respondents (50%) evaluated their later life as “excellent” (12%) and “very good” (38%). A substantial proportion of respondents (44%) took the middle ground giving ratings of “good” (28%) or

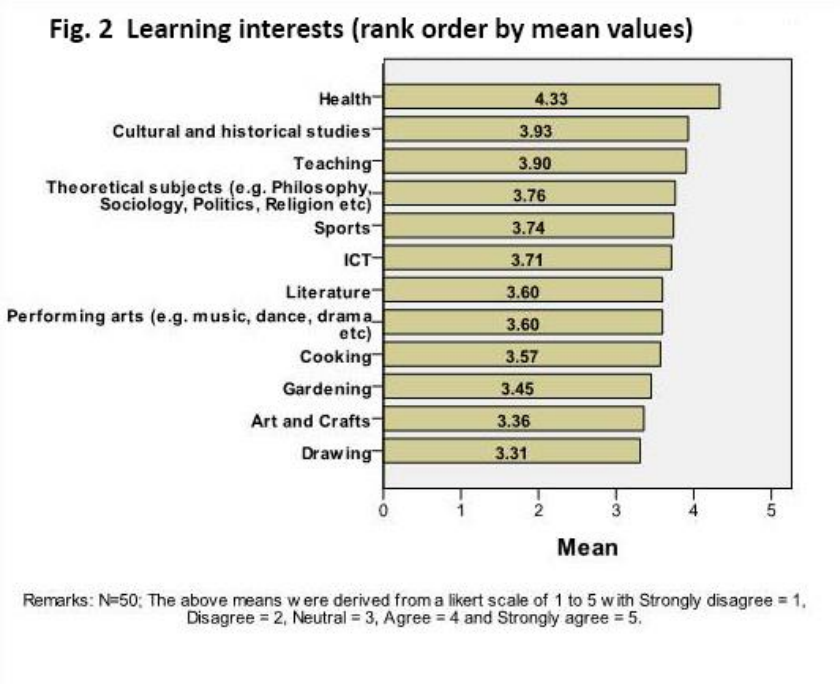
"quite good" (16%). Only 4% rated "fair", while no one said "not good" at all. It transpired that the vast majority of this group of respondents (94%) was happy with their later years in life and that they were ageing rather successfully.

Learning in old age

Question: In the past 12 months, have you participated in some learning activities?

A proportion as high as 94% was recorded for participation in learning in the past 12 months. The respondents were in fact responding in the context of prior learning before their current studies with the Hong Kong Institute of Education Elder Academy. When asked what they wanted to learn, they were given a list of topics to indicate their preferences from "strongly agree" to "strongly disagree" on a scale of 5 to 1.

Question: What do you want to learn?

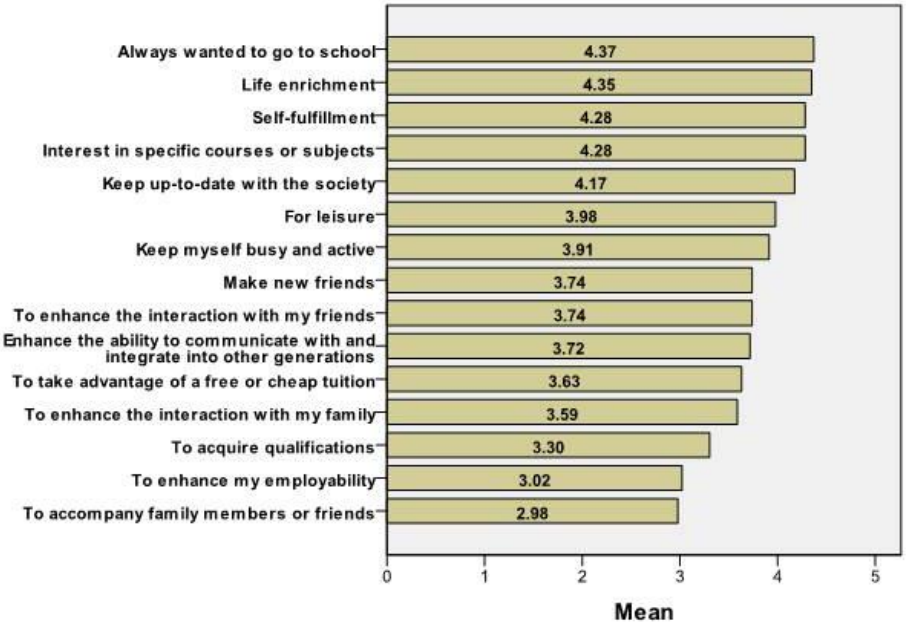


Among the various topics, health-related ones were the most preferred, followed by cultural and historical studies, and teaching. Teaching was rated highly because half of the sample was doing a teacher training programme for instructors of the elderly. In fact, there were significant differences between the two sub-samples with respect to cultural and historical studies and teaching as shown in the t-test results on page 6. Scoring a mean between 3.60 and 3.76 were subjects related to Philosophy, Sociology, Politics and Religion, Sports, ICT, Literature and Performing Arts. Topics which were less preferred were those more leisure-oriented, including cooking, gardening, arts and crafts, and drawing. It seemed that for this particular group of respondents, their learning interests were related to intellectual and academic studies rather than subjects that were leisure and recreational in nature.

Reasons for learning

Question: Why do you continue to learn?

Fig. 3 Reasons for learning (rank order by mean values)



Remarks: N=50; The above means were derived from a likert scale of 1 to 5 with Stronly disagree = 1, Disagree = 2, Netural = 3, Agree = 4 and Strongly agree = 5.

Among the 15 reasons given, the following reasons were rated the highest:

- Always wanted to go to school (mean = 4.37)
- Life enrichment (4.35)
- Self-fulfillment (4.28)
- Interest in specific courses or subjects (4.28)
- Keep-up-to date with the society (4.17)

It seemed that most of these reasons were related to an intrinsic interest in learning, which was about self-fulfillment and the desire to keep learning for self-betterment.

The next tier of reasons for learning included:

- For leisure (3.98)
- Keep myself busy and active (3.91)
- Make new friends (3.74)
- Enhance interaction with friends (3.74)
- Enhance ability to communicate with and integrate into other generations (3.72)
- Take advantage of a free or cheap tuition (3.63)
- Enhance interaction with family (3.59)

Most of these reasons were about building relationships with friends, family and people in other generations. Finally, the three lowest scoring reasons were:

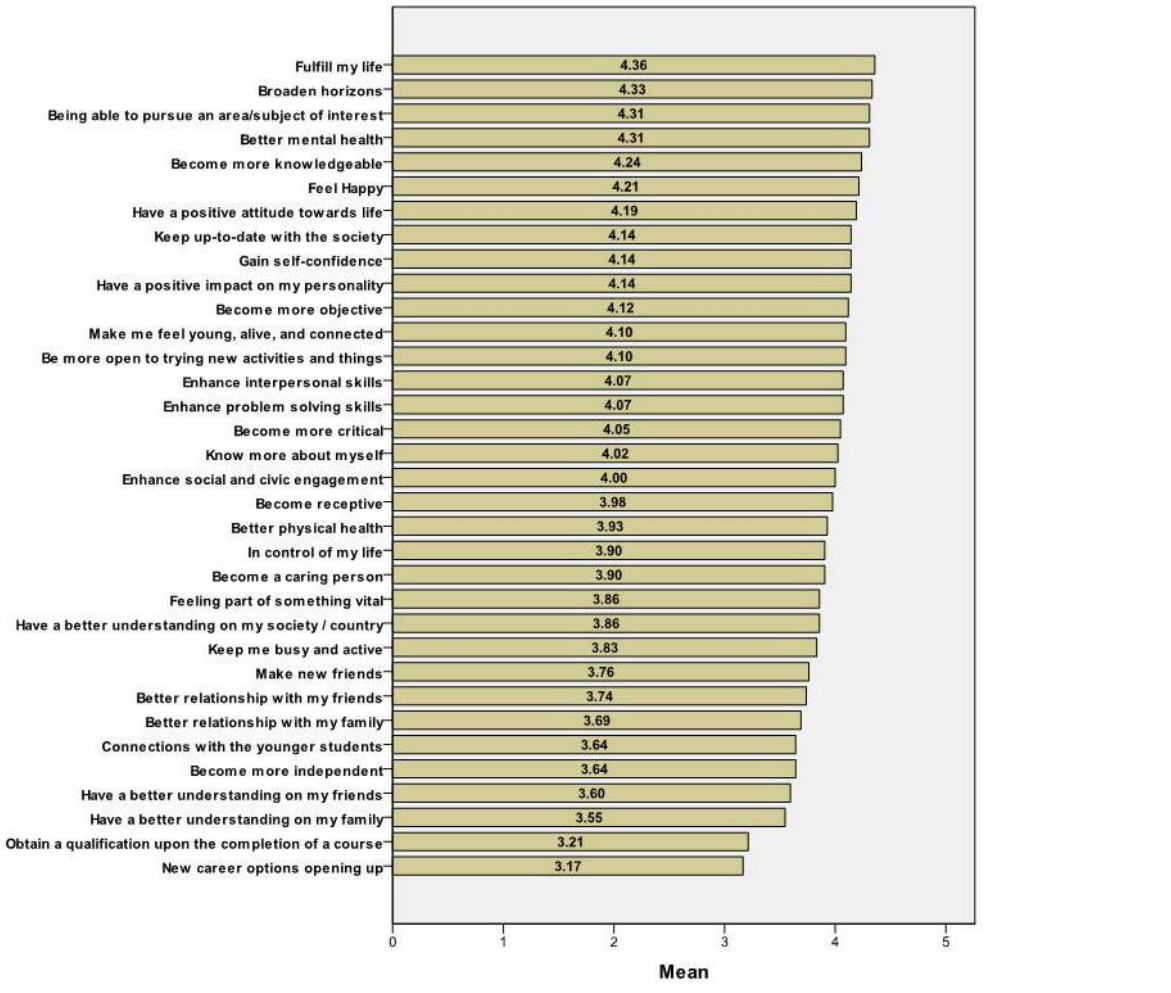
- To acquire qualifications (3.30)
- To enhance employability (3.02)
- To accompany family members or friends (2.98)

The reasons related to self-fulfillment and development they gave for continued learning seemed to be appropriate for this sample which consists of mainly people who have retired, or are approaching retirement. Their simply lack of interest in learning related to formal qualifications or for employability was indicative of their personal goals and circumstances. However, there were significant differences between the two groups in the sample with respect to the 'qualifications' reason as reported on page 6 of this paper.

Role of learning in successful ageing

Question: How does learning facilitate successful ageing?

Fig. 4 Learning and successful ageing (rank order by mean values)



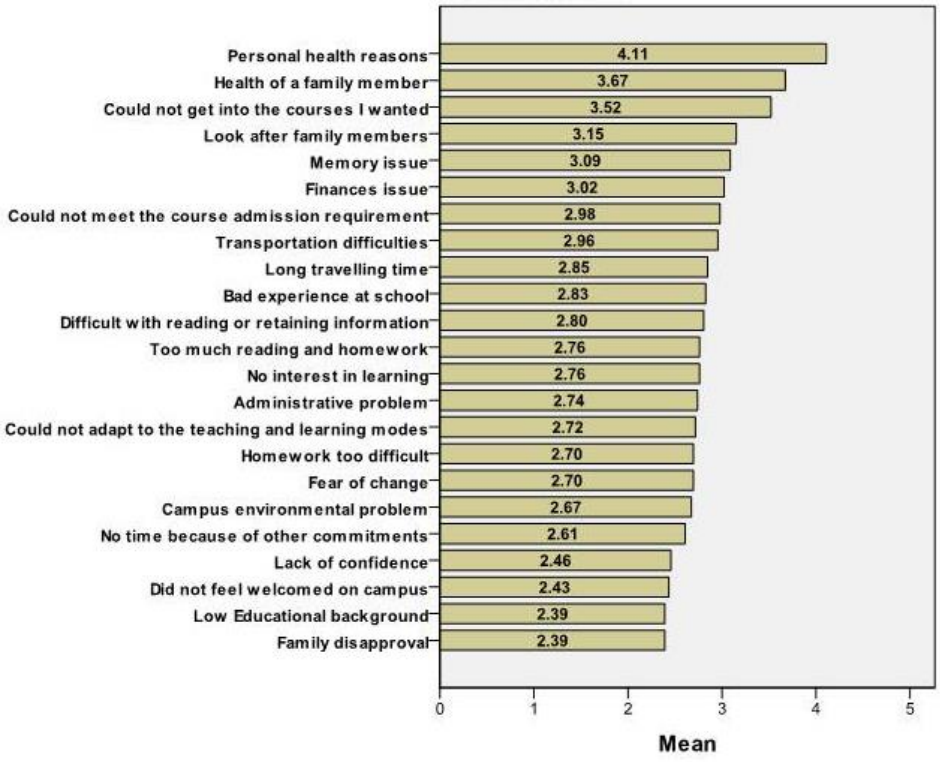
Remarks: N=50; The above means were derived from a likert scale of 1 to 5 with Stongly disagree = 1, Disagree = 2, Neutral = 3, Agree = 4 and Strongly agree = 5.

The respondents were presented with 34 statements to which they responded on a likert scale of 5 to 1. The findings as shown in Fig. 4 were related to fulfillment and betterment of oneself on various fronts: mentally, intellectually, emotionally and even physically in terms of better health. The two lowest scoring statements about qualifications and new career options were considered less important in facilitating successful ageing. Again, there were significant differences regarding these two statements between the two groups in the sample as reported on page 6.

Barriers to participation

Question: What are the barriers that hinder your participation in lifelong learning?

Fig. 5 Barriers to learning (rank order by mean values)



Remarks: N=50; The above means were derived from a likert scale of 1 to 5 with Strongly disagree = 1, Disagree = 2, Neutral = 3, Agree = 4 and Strongly agree = 5.

For the purpose of interpretation, the above barriers were grouped into three categories: dispositional, situational and institutional (Cross 1981). Dispositional and situational barriers are related to the individual's personal life and circumstances, while institutional barriers are inhibiting factors presented by existing policy and a lack of support from the government, educational providers and other community agencies.

Situational factors

- Personal health reasons (mean = 4.11)

- Health of a family member (3.67)
- Look after family members (3.15)
- Financial issue (3.02)
- No time because of other commitments (2.61)
- Family disapproval (2.39)

Dispositional factors

- Memory issue (3.09)
- Difficulty with reading or retaining information (2.80)
- No interest in learning (2.76)
- Could not adapt to the teaching and learning mode (2.72)
- Fear of change (2.70)
- Lack of confidence (2.46)
- Low educational background (2.38)

Institutional factors

- Could not get into the courses I wanted (3.52)
- Could not meet the educational requirements (2.98)
- Transportation difficulties (2.96)
- Long travelling time (2.85)
- Bad experience at school (2.83)
- Too much reading and homework (2.76)
- Administrative problem (2.74)
- Homework too difficult (2.70)
- Campus environmental problem (2.67)
- Did not feel welcomed on campus (2.43)

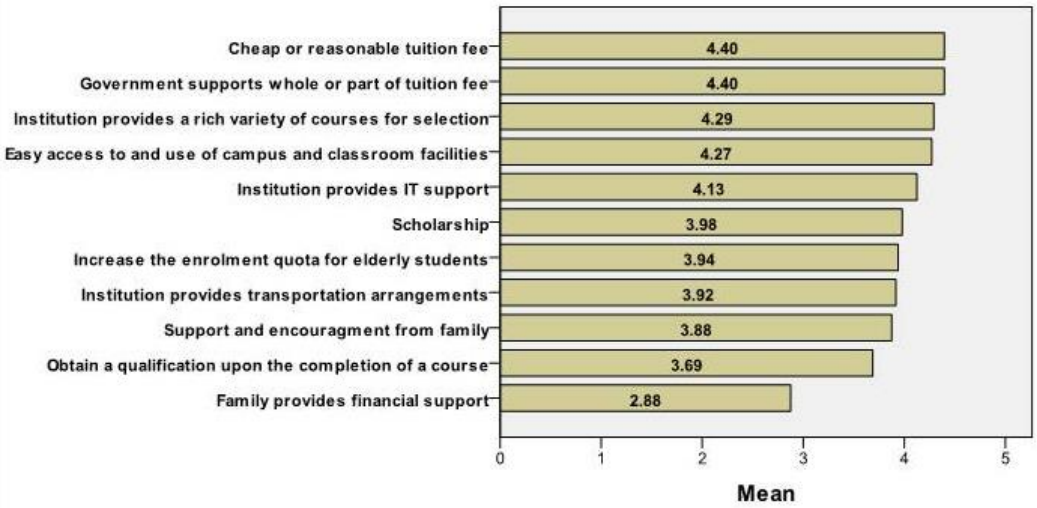
In fact, not much could be done regarding the situational and dispositional barriers as they were related to the particular circumstances in which the elder learners found themselves. However, it was those institutional factors that policy makers, researchers and educational providers could try to help to eliminate some of the barriers that were found in the institutional systems and support, teaching, curricula, policies and infrastructure that might have hindered elders' participation in learning.

Facilitation of elder learning

Question: What can be done to enhance your motivation to learn?

Finally, the respondents were presented with 11 facilitating factors for learning to which they responded on a 5-point likert scale.

Fig. 6 Facilitators of learning (rank order by mean values)



Remarks: N=50; The above means are derived from a likert scale of 1 to 5 for Srongly disagree (1), Disagree (2), Neutral (3), Agree (4) and Strongly agree (5).

Apparently, most of the highly rated facilitators were related to institutional support and policy where the concern over tuition fee was topping the list, followed by wider curriculum choices, campus facilities, IT support, scholarship, larger enrolment quota and transportation arrangements. On a more personal front, family support, either in the form of encouragement or financial support, was considered to be less facilitating. The significant difference between the two groups regarding a larger enrolment quota was identified and explained on page 6 of this paper.

IMPLICATIONS FOR LATE-LIFE LEARNING

From the research findings, it transpired that most of the respondents were ageing rather successfully as 94% of them evaluated their later life from “excellent” to “quite good”. In fact, only 2 out of 50 respondents evaluated it “fair”, with none choosing “not good”. As to the attributes of successful ageing, the findings showed that successful ageing is multi-dimensional which is subjected not only to bio-medical health factors, but also factors that are related to quality of life, independence and ability to make choices, engagement in activities and a higher self-esteem. Such a view is akin to the multi-dimensional model of successful ageing espoused by the WHO (2002) which is “a process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age” (2002:12). Education and continued learning, which is an aspect of participation, was in particular rated highly by this group of respondents in the research.

Using a subjective evaluative approach, this research has asked respondents to assess their own well-being in older age and to rate those attributes of well-being that they considered

important to successful ageing. Understanding their perceptions of well-being is critical to understanding their subjective experiences in the ageing process and what they value as important to successful ageing. Apart from good health, attributes that were considered important by the majority of respondents of this group are focusing on their own life and self conditions, including self-acceptance, independence or autonomy, environmental mastery and the general sentiment of feeling good and satisfied. However, social and family relationships were rated less important by this group of respondents. Such finding seems to contravene the general view that people in individualistic societies, such as America and Western Europe, are more likely to focus on their own life and self conditions, while people in collectivistic societies such as China, Hong Kong, Taiwan, Japan, South Korea, Thailand, are more likely to consider social relationships including family and friends when they assess their own well-being (Ingersoll-Dayton et al 2004; Suh et al 1998). Such discrepancy suggests that care is needed when interpreting older people's subjective well-being which is generally believed to be related to their own value systems and the predominant cultural values in which they exist (Christopher 1999). Aside from the cultural factor, research has also shown that old people may have distinct conceptions of subjective well-being due to the result of adaptation strategies, cohort effects, or age-related life circumstances (Ryff 1989; Westerhof et al 2001). This is perhaps particularly the case with this group of respondents, most of who are rather well-educated and will therefore value individualistic attributes such as independence, autonomy, self-acceptance, environmental mastery more when they consider their well-being in older age. Besides, the small sample has also made it difficult for this research to make generalizations across different elderly groups and even among the elders themselves.

As this part of the research questionnaire about successful ageing was adapted from the Phelan et al (2004) study, it is interesting to compare the results of this research on Hong Kong Chinese elders against older adults in the United States. However, we need to be cautious about the small sample which could flaw the comparisons among elders in Hong Kong and between the Hong Kong and American groups as we try to draw conclusions based on the differences between options, which were in fact rather small, although they were found consistent with previous research on elder people and learning (for example, Aldridge and Tuckett 2007; Boulton-Lewis et al 2006; Phelan et al 2004; and Withnall 2000). In this light, the comparisons were made just to illustrate what different groups of elders might possibly differ in their subjective views about active or successful ageing. Among the various attributes to successful ageing, there are three attributes that were highly rated by both the Hong Kong and American groups. The three attributes are "being able to make choices about things that affect how your age", "feeling good about yourself" and "remaining in good health until/close to death". However, family support was rated by the American

counterparts as important, but less so by the Hong Kong group. As regards the least important attributes, the respondents in both studies shared the view that “living a very long time” and “being able to do paid or volunteer work after retirement” to be least important. However, the American respondents accorded very little importance to the attribute, “continuing to learn”, while the Hong Kong respondents valued it highly as one of the top three important attributes to successful ageing. This resonates with the earlier claim that this particular group of Hong Kong respondents, who are currently engaged in learning, is more inclined to view continued learning in old age very important to successful ageing.

Another important objective of this small-scale research is to identify the role of learning in successful ageing. Results and findings pertinent to what elders want to learn, why they continue to learn, how learning facilitates successful ageing, what barriers inhibit their participation in learning and what is needed to help should provide useful insights into the planning and provision of late-life education for elders in old age. From their responses to what they want to learn, implications can be drawn for curriculum planning and choice of offerings to provide courses and programmes that meet the needs of elders. For this particular group of respondents, courses that are related to health, cultural and historical studies, teaching, sports, ICT and theoretical subjects like Philosophy and Sociology will be appropriate. The reasons for them to continue to learn also provide information about the type of courses they need. Rather than learning to acquire qualifications and to enhance employability, this group of respondents prefers to learn for life-enrichment, self-fulfillment and the need to keep up-to-date with the society. Such findings concur with why they think learning is important to successful ageing. The majority of them believed that learning can help fulfill their lives, promote better mental health, broaden horizons, become more knowledgeable in an area/subject of interest, feel happy and confident, have a positive attitude towards life and generally, make them feel energetic, alive and connected.

There are also important implications for policy makers and educational providers, who should be concerned about the barriers to participation in elder learning and what can be done to alleviate the barriers. While most of the barriers identified by this group of respondents are related to the dispositional and situational factors, such as personal and family members’ health conditions and memory issue, there are quite a few institutional barriers that can be dealt with by providers and organizers. These barriers include “could not get into the courses I wanted”, “could not meet the requirements of the courses”, “transportation difficulties” and “long travelling time”. To deal with these barriers, providers and organizers may need to reconsider their education policies and to provide a wider choice of subjects and more places to accommodate the different needs of elder learners. Infrastructure and campus facilities may also need to be improved to help elders overcome

the transportation and long commute issues. Specifically, elders want providers and the government to support whole or part of tuition fee, to provide a rich variety of courses for selection, IT support, easy access to and use of campus and classroom facilities, and an increased quota for elderly enrolment.

CONCLUSION

This paper, which is based on a small-scale research project conducted with a group of 50 elder learners currently studying with an elder academy within a local higher education institution in Hong Kong, has explored the perceptions of successful ageing and the centrality of learning in the process of getting old. The research findings transpired that most respondents in this research study are ageing well and they consider attributes, including independence, autonomy, continuation to learn, remaining in good health and a general sentiment of feeling good and satisfied, important to successful ageing.

In this research project, learning was considered by the respondents to have an important impact on ageing and can support successful ageing. The desire to keep learning for life enrichment and self-fulfillment was cited as an important attribute to successful ageing. They generally agreed that they needed to, and wanted to, learn new things to maintain better mental health, broaden horizons, become more knowledgeable, feel happy and confident, have a positive attitude towards life and, generally, make them feel energetic, alive and connected. Most said that some personal and situational factors did pose as barriers to their participation in late-life learning, while there are a few institutional barriers that instructional providers and educational organizers, as well as policy makers, can help to alleviate by way of increased support in the form of scholarship, expansion of enrolment quota and choice of subjects, and infrastructure improvements that make it conducive for elder learners to commute to school and to gain easy access to and use of campus and classroom facilities.

In summary, if we are to help elders to face the challenges of ageing and to benefit from the learning opportunities that are available, we need to do three things: (a) find ways to increase the chances of successful ageing by promoting independence, autonomy, environmental mastery, self-acceptance and the desire to keep learning; (b) find ways to support those who need learning to make their later years more fulfilling, enriched and happier; and (c) find ways to eliminate or alleviate as far as possible those barriers to late-life learning, in particular those barriers that are under the control of institutional providers and organizers. Such actions, in totality, can increase the likelihood of successful ageing through active learning by improving the quality of life as people age.

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