Ageing and learning as conceptualized by senior adults in two cultures : Hong Kong and Australia

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Ageing and learning as conceptualized by senior adults in two cultures: Hong Kong and Australia

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Abstract:

This paper is about a study aimed to understand what successful ageing and later life learning mean to older adults in two cultures: Hong Kong and Australia. Findings from the study were reported in this paper to shed light on (1) the meaning of ageing and learning as conceptualized by elders in Hong Kong and Australia, (2) the reasons for participation in later life learning, as well as, barriers for non-participation, (3) their learning interests and instructional preferences, and finally (4) the correlation between learning and successful ageing, and between learning and other well-being variables, including health, happiness and satisfaction of elders in Hong Kong and Australia. Two large samples of elders from Hong Kong (n=519) and Queensland, Australia (n=421) participated in the study. Within group analysis of the data from the two locations indicated that there are more similarities, rather than differences, between elders in Hong Kong and Australia with respect to background characteristics, meanings of ageing and learning, reasons for participation, barriers for non-participation, learning interests and instructional preferences.

1. INTRODUCTION

1.1. The study

Previous research has shown that learning is essential to successful ageing and affects enjoyment of life, confidence, self-concept, satisfaction, health, and the ability to meet challenges presented by ageing. [1-4]. There has been, however, limited international research into the impact of cultural influences on elder learning; and very little has examined learning from the perspective of the elderly, and across different cultural contexts. The cross-cultural research reported in this paper aimed to examine and develop understanding about learning and ageing as conceived by older adults from two different cultures: Hong Kong and Australia. The two locations were picked because this project involved a team comprising the Principal Investigator from a Hong Kong higher education institution working in collaboration with researchers from a university in Australia. Also, the fact that Hong Kong is a Chinese-oriented society and Australia is very much dominated by Western culture has made it possible to undertake an East-West comparison with regard to elder learning in the two cultures. This cross-cultural research has examined the differences, as well as commonalities, of elders' involvement in continued learning, and important learning issues including interests, and instructional preferences. This cross-cultural research has examined the differences, as well as commonalities, of elders' involvement in continued learning, and important learning issues including interests, and instructional preferences. It has also examined the reasons and barriers to participation in learning. It was the aim of this research to make a significant contribution to the yielding of new knowledge and insights into the similarities and differences in reasons, barriers, and preferences for learning by elders in different cultural contexts as they understand and experience continued learning.

1.2. The ageing populations

Around the world, populations are ageing, which has a strong impact on many facets of human life including social, economic, cultural and political. If the world population remains on an ageing trend, there will be significant costs associated with accommodating an expanded aged population. Understanding and providing for ageing is, therefore, an important issue for all governments in the future.

In Hong Kong, the total population was 7.22 million in 2013 [5]. In recent decades, the population has shown an increasing trend of ageing. According to the Census Report published in 2012, the proportion of the population aged 65 and over is projected to rise markedly from 13% in 2011 to

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30% in 2041 [6]. The projected growth of the older population in Hong Kong is shown in Fig. 1.

(INSERT Fig. 1 here)

Hong Kong also has one of the lowest birth rates in the world. In 2013 the fertility rate was 1.20 babies per woman; and Hong Kong residents are now living longer, with life expectancy averaging 80.5 years for males and 86.7 years for females [5]. The combination of a low fertility rate and longer life span for many residents means that Hong Kong is facing the challenge of having a fast ageing population, requiring the government to put in place policies and strategies to foster successful ageing. One such strategy is promoting lifelong learning, which is believed to play a vital role in enhancing the quality of later life.

In Australia, individuals aged 65 years and older constituted 14.4% of a total population of 23.1 million in June 2013 [7]. In Queensland, from which the Australian sample of the study was drawn, the resident population in June 2013 was 4.66 million, with the proportion of Queenslanders aged 65 years and over being slightly less (13.6%) than the national average [8]. In 2013, Australia had a fertility rate of 1.88 babies per woman [9] and a life expectancy of 80.1 years for males and 84.3 years for females [10]. Although the Australian fertility rate is not as low as that of Hong Kong, Australia is also facing the challenge of an ageing population. The proportion of Australians aged 65 and over is predicted to rise rapidly over the coming decades. While this age group accounted for around 14.4% of the total population in June 2013, this figure has been projected to increase to between 27% and 30% of the national population by 2051, and to between 29% and 32% by 2101 [11]. Refer to Fig. 2 for the projected growth of the older population in Australia.

(INSERT Fig. 2 here)

2. LITERATURE REVIEW

2.1 Successful ageing and culture

In the literature on successful ageing, two perspectives generally prevail: the bio-medical and the multidimensional [12]. The biomedical model, which characterized earlier successful ageing research, emphasized the health aspect of getting older. In a similar vein, Rowe and Kahn [13] defined successful ageing as the lack of age-related decline, both physical and mental. Following this, they added three essential components for successful ageing: avoidance of illnesses, maintaining cognitive capacity, and actively engaging in life [1]. Though seemingly broader, the expanded definition is still restrictive in the sense that it focuses mainly on the physical dimension of ageing and compares diseases in old age against normal ageing, rather than successful ageing [14]. Adding a subjective or psychological dimension to the definition of successful ageing is Baltes' and Baltes' [15] model of selective optimization with compensation. This model focuses on

coping and continual adaptation by older persons as a means to increase their chances of achieving successful ageing through engaging in activities that are suitable for them in a bid to compensate for their limitations presented by ageing. Here, successful ageing is not focusing on the biomedical condition, but rather the individual efforts of elders adjusting to and coping with ageing in a subjective sense. [16].

From a different perspective, Phelan et al. [17] conceived successful ageing as a multidimensional concept, which includes the physical, functional, psychological, and social dimensions. This view is against any possible attempt to objectively measure successful ageing as a 'state of being'. Instead, it advocates that successful ageing be assessed as a subjective experience, which is unique to the individual. In summary, there are two major perspectives of defining and assessing successful ageing in the literature. There is one that views successful ageing as a stage of being, which can be objectively evaluated. There is another that sees ageing as a subjective experience where elders should be given the opportunities to define successful ageing by themselves and to identify those factors that are important to help them age successfully [12]. There is never a shortage of both quantitative and qualitative research on the topic of successful ageing in the literature. However, most of them have not defined the meaning of 'success' from the perspective of elders themselves. Success is a subjective concept relative to different people in different cultural contexts, each with its own relevant norms and values for people of that culture [18]. This explains why there could be many different indicators of successful ageing by people in different cultural contexts. Despite the differences, there could also be similarities across cultures about what successful ageing means. To many people, successful ageing would mean living a long life, being in good physical and mental health, psychological well-being, effective functioning, social support, life satisfaction, independence, participation and learning, personal development, contribution to society, and even re-employment, among others. But of course, we know that people in different societies and cultures will value certain factors more than the others due to their different cultural backgrounds, values and norms.

There is a need, therefore, not only to understand the meaning of successful ageing, but more importantly, to understand the meaning of it from people across different cultures, as well as within the same culture. A very large-scale cross-cultural study on ageing conducted by Lockenhoff et al. [19] has involved 3,000 university students from 26 countries across six continents. The aim of the study was to find out their perceptions of age-related changes in physical, cognitive, and psychological functioning. Also, their views about ageing from their respective cultures and societies were collected for comparison. Influenced by the social representations theory [20, 21], which views ageing in a particular cultural context, Lockenhoff et al. [19] have identified differences, as well as similarities, in views of ageing across cultures. For example, what is less amenable to cultural variation are perceptions related to the physical

aspect of ageing, such as appearance. But perceptions pertaining to motivations and roles in society are more susceptible to cross-cultural variation.

A similar study undertaken by Keith et al. [22], called the Project AGE, is another large-scale research project on successful ageing. Project findings have found both similarities and differences in what is meant by 'a good old age' among individuals from different cultures. For example, what is considered desirable across all cultures is good health and material security. To this end, poor health (including poor functionality) is the main factor for not ageing well, affecting quality of life as one ages. However, there is also research showing that poor health and declining functional abilities do not necessarily adversely affect life satisfaction and thus successful ageing. For example, Collins [23] found that poor health is not the major factor that prevents elders from ageing successfully. Instead, ideological values were found to be more important than other material factors amongst Canadian Inuit elders with regards to successful ageing. There is also comparative research on ageing that shows many adjustment measures, including active participation in activities, such as learning, volunteering or simply socializing with people, can compensate for poor health. In a similar vein, Wilcox et al. [18] have found that Japanese women feel they are obliged to take part in social activities and actively participate within society by taking good care of themselves so as to stay physically and mentally healthy. In summary, previous research has shown that adjustment measures and their deployment can help elders adjust better to changes in the ageing process across cultures.

Despite previous cross-cultural and multi-cultural research on the issue of ageing successfully, little has been found about the influence of cultural differences on how elders define and understand the ageing process. As successful ageing is culturally relative, there should be both inter- and intra-cultural variations in how successful ageing is to be conceived of [23]. By conducting the current study in two places – Hong Kong and Australia – has enabled the researchers to examine both differences and similarities as elders conceptualized and experienced ageing across and within these two cultural contexts.

2.2 Learning and culture

Within the educational literature, there is an abundance of research exploring the association between the meaning of learning and culture. However much of it is limited to contrasts between the East and West. Frequently, learning in the East and West are seen as polarized and observed differences are explained as being indicative of the Confucian-Western dichotomy [24] or the Confucian-Socratic tradition [25]. With regards to lifelong learning, Confucian beliefs suggest that learning is a continuous effort throughout life in order to instill a moral life and to become a virtuous individual [26]. Confucius viewed learning as primarily for oneself rather than learning for others. Whilst Confucius believed that learning can deepen one's life and

character, the view of learning for others corresponds with views of lifelong learning in the West as instrumental and driven by competition, for the purpose of competing and surviving in a knowledge-based society [26]. This perception of learning in Western cultures as instrumental focuses on the economic role of an individual rather than focusing on personal growth and development. Meanwhile, the Confucian view sees learning as transformational and occurring throughout the lifespan. According to Confucius, learning is life; it is to understand how to live as a human being [27].

The distinctions made between learning in the East and West has been criticized for being overly simplistic because the influence of culture upon learning is seen to be static. For instance, Hofstede's depiction of East-West differences according to individualism and collectivism has resulted in the concept of national culture differences [28], leading to the development of nation-based constructs, for example 'the Chinese learner'. Researchers such as Gu and Maley [29] and Kennedy [30] argue that these national constructs assume group homogeneity and ignore intra-cultural differences associated with personal characteristics, such as gender and socioeconomic status. Furthermore, in most comparisons between learning in the East and West, cultural differences are focused upon and similarities often overlooked. Yet there are frequently times when East and West cultures can overlap and correspond. The similarities between the East and West explain the possibility of individuals from either the East or West being bi-cultural [31]. Indeed, individual differences exist within cultures as evidenced by the extent that members of a given group vary in how far they adhere to the values and principles of the culture [32]. One important feature of culture is fluidity, rather than being static [33]. As Jarvis [34] has aptly pointed out, the East and West are not simply two cultures that have developed differently, and individuals reflect more than being parts of various cultural groups. Accepting cultural differences does not exclude the possibility of similarities between different cultures.

Acknowledging both differences and commonalities within and across cultures should be emphasized to gain a greater understanding of the value systems within specific cultural contexts. A wider view of culture, rather than the simplistic comparisons drawn between the East and West, therefore underlines the approach of this research as a comparison of Hong Kong and Australia for investigating both the differences and commonalities across cultures, along with capturing the unique nuances in each person's view and interpretation of cultural constructs, including successful ageing and continued learning.

3. RESEARCH OBJECTIVES

The present study aimed to examine and compare how older adults in Hong Kong and Australia experience and view age and learning in their later years. More precisely, the research goals are:

(1) to describe the meanings that elders from two different cultures (Hong Kong and Australia) ascribe to ageing and learning,
(2) to investigate how and why elders in Hong Kong and Australia participated or did not participate in learning, by examining their reasons for engaging in learning and barriers to their involvement (3) to identify issues that affect learning for elders in the two study locations, including what and how they prefer to learn, and their other learning needs, and lastly (4) to explore how learning and ageing successfully are related, and the association between learning, ageing successfully, happiness and well-being of Hong Kong and Australian seniors.

4. RESEARCH METHODOLOGY

4.1 The samples

As the current research is a cross-cultural study, two samples were taken, using participants from Hong Kong and from Queensland, Australia. In Hong Kong, a purposive sampling method was used, to recruit 519 individuals, ranging in age from 55 to 75 or above. There is, in fact, not an official definition of 'elders' or 'seniors' in Hong Kong. But the generally accepted view is that anyone above 60 is considered 'old'. This is partly because the official retirement age for civil servants in Hong Kong in the past was 60, while some may retire as early as 55 if they are eligible for the full pension upon early retirement. The Hong Kong sample was drawn from 17 community centres for the elderly on the List of District Elderly Community Centres [35]. The researchers ensured that the community centres chosen were from areas of Hong Kong that had different socioeconomic profiles. Researchers first contacted each community centre, after which fifty copies of the questionnaire were sent. Alongside the questionnaire, a sampling frame was sent to assist participant selection, with the goal to select a representative and dispersed sample. Elder persons involved in the study are required to be cognitively intact to be able to understand the questions. However, a research assistant was present on site to offer assistance where needed. The 17 centres received a total of 1,040 questionnaires and sample guides. The researchers received 822 completed questionnaires, yielding a response rate of 79%. Eventually, 519 valid, cleaned copies were utilized for the study, giving a final response proportion of around 50%.

In Australia, sample recruitment took place with the assistance of two organizations operating in the state of Queensland. Each of these organizations seeks to improve the lives and well-being of older citizens through their respective activities. The first is a state arm of a national organization, while the other is a senior citizens organization based in a suburb located south-east of Brisbane, the capital city of Queensland. Alphabetical membership lists held by each of the two organizations were used to systematically select the sample. The procedure involved selection of every third name on the list of the state organization (n=878) and every second name on the list of the senior citizens

organization (n=970). A survey questionnaire was then mailed to each of the selected participants, who independently completed and returned it to the project site via reply paid envelopes. From a total of 1,848 surveys distributed to members of these organizations, 421 were returned, yielding a response rate of 22.42%, which is acceptable for a postal survey.

4.2 Learners versus non-learners

One of the research goals of the present study was to examine the differences and similarities between learners and non-learners according to their individual characteristics, reasons, and barriers to engaging in learning. As such, it was crucial to differentiate the learners from the non-learners. There are three types of learning (not limited to learning in later life); formal, non-formal and informal. Formal learning includes learning arranged by education institutions (i.e. schools, colleges and universities) and typically includes regular courses, lectures and workshops [36]. Non-formal learning refers to shorter, voluntary lessons or activities that take place at non-educational centres, such as social clubs or community centres. Non-formal learning is typically non-vocational and is non-credentialed [42]. Informal learning, according to Jarvis [43], refers to learning that occurs when knowledge, understanding and skills are acquired through the everyday experience of living. In order to distinguish learners from non-learners for the present study, learners were individuals who had engaged in organized learning (both formal and non-formal) during the last six months. Organized learning was viewed as occurring when individuals engaged in courses, seminars and workshops at educational and non-education centres. In the questionnaire, participants were required to identify themselves as having either participated or not in organized learning in the previous six months. For the purpose of this study, those who agreed that they had participated in formal or non-formal learning (at educational or non-educational centres) in the previous six months were categorised as 'learners' whilst individuals were classified as 'non-learners' if they reported informal or no learning in the previous six months. As a result, there were 282 (54.5%) learners and 237 non-learners (45.5%) in the Hong Kong sample; and 199 (47.3%) learners and 222 (52.7%) non-learners in the Australian sample.

4.3 The questionnaire

A self-developed questionnaire, called the "Learning and Ageing Survey 2013", was used. It included a total of 108 structured questions in three sections. Part 1 focused upon the individual characteristics of respondents. Part 2 investigated learning engagement or not, reasons for learning, obstacles to learning, learning interests and preferences, and meanings ascribed to elder learning. Part 3 explored what successful ageing meant to respondents and gathered self-report information about respondents' well-being and life satisfaction. The questionnaire was originally constructed in English, after which it was translated to Chinese for the Hong Kong participants, and later back translated. A pilot study of the survey was undertaken with

50 elders, drawn from the Elder Academy of the Hong Kong Institute of Education. Validity tests of items within each of the major constructs, including needs/reasons for learning, barriers to participation, meanings ascribed to learning in later life and successful ageing were conducted, resulting in alpha coefficients of .81, .85, .70 and .72 respectively. Refer to the Appendix for more information about the structure and contents of the questionnaire.

4.4 Data analysis

Data analysis was carried out to fulfill the research goals. First, descriptive statistics focusing on the meanings ascribed to ageing and learning as perceived by elders in Australia and Hong Kong were given. Second, chi-square and ANOVA analyses were carried out to assess the differences between individual characteristics of the learners and non-learners for both the Hong Kong and Australian samples. Thirdly, descriptive statistics were given to pinpoint crucial learning issues for older adults, such as their interests, instructional preferences, reasons and barriers to their participation in continued learning. Lastly, correlation analysis was conducted to examine the association between learning and successful ageing, and that of learning and the overall well-being and life satisfaction of elders in the two study locations.

5. RESULTS

5.1 Background information
Table 1 gives the background details of the Hong Kong and Australian participants in the study.

Table 1. Background Information

Item	Group	Hong Kong Sample (N=519)		Australian Sample (N=421)	
		N	Percentage	N	Percentage
Gender	Male	235	45.3%	164	39.5%
	Female	284	54.7%	251	60.5%
Age	55-59	62	11.9%	30	7.3%
	60-64	89	17.1%	42	10.1%
	65-69	99	19.1%	87	20.9%
	70-74	121	23.3%	96	23.2%
	75 or above	148	28.5%	160	38.5%
Marital Status	Married	348	66.7%	218	52.4%
	Widowed	106	20.6%	104	24.2%
	Never married	28	5.4%	32	8.2%
	Separated or Divorced	38	7.4%	63	15.1%
Children	Yes	457	88.6%	329	84.8%
	No	48	11.4%	52	13.4%
Education Level	No formal education	54	10.5%	2	0.5%
	Primary	184	35.7%	26	6.3%
	Secondary	217	42.1%	167	40.1%
	Technical institute	39	7.6%	95	22.8%
	University	22	4.3%	126	30.3%
Residence	At home alone	123	24.1%	155	37.2%
	At home with family	385	75.3%	222	53.3%
	In a retirement/nursing home	1	0.2%	39	9.4%
Employment	Full-time/part-time	27	5.3%	78	18.8%
	Retired/not employed	488	94.8%	337	81.0%
Volunteer	Yes	315	61.3%	231	56.5%
	No	199	38.7%	178	43.5%
Financial position	Not well off	70	13.6%	161	39%
	Well off	442	86.4%	247	61%
Feeling valued by community	Not valued	35	7.5%	53	13.6%
	Valued	432	92.5%	292	75.1%
Engaged in organized learning	Yes	283	54.5%	199	47.3%
	No	236	45.5%	222	52.7%

Remarks: some percentages do not add up to 100% due to missing data.

5.2 Meaning of successful ageing
With regards to the meanings ascribed to successful ageing,
participants in the two cultural contexts reflected the level of
their agreement to all of the 20 qualities as shown in Table
2.

Table 2. What do you mean by successful ageing?

		Hong Kong Sample	Australian Sample
		Mean (1-6)	Mean (1-6)
1	*Living a very long time*	*3.66*	*4.06*
2	*Remaining in good health until death*	*5.24*	*5.53*
3	Feeling satisfied with your life most of the time	4.86	5.35
4	Having the kind of genes (or heredity) that help you to age well	4.46	4.95
5	Having family who are there for you	4.87	5.11
6	Having friends who are there for you	4.82	5.17
7	Staying involved with the world and the people around you	4.87	5.34
8	*Being able to make choices about things that affect how you age, like your diet, exercise, and smoking*	4.72	*5.52*
9	Being able to meet all of your needs and some of your wants	4.68	5.29
10	Not feeling lonely or isolated	4.72	5.32
11	*Adjusting to changes that are related to ageing*	*4.91*	5.27
12	Being able to take care of yourself until close to the time of death	4.89	5.46
13	*Having a sense of peace when thinking about the fact that you will not live forever*	*5.08*	5.24
14	Feeling that you have been able to influence others' lives in positive ways	4.72	5.02
15	Not dwelling on regrets you may have about how you have lived your life	4.75	5.15
16	Being able to do paid or volunteer work after usual retirement age	4.54	4.75
17	Remaining free of chronic disease	4.87	5.39
18	Continuing to learn new things	4.75	5.18
19	*Being able to act according to your own inner standards and values*	4.71	*5.47*
20	Being financially well off	4.64	4.73

Remarks: The highest and lowest items are highlighted in
italics. Responses were scored on a 6-point Likert scale
from Strongly disagree (SD) =1 to Strongly agree (SA)=6.

Hong Kong respondents' agreement about the attributes of successful aging were highest for the following statements:

Mean (1-6)

- Remaining in good health until close to death
5.24
- Having a sense of peace about not living forever
5.08
- Adjusting to changes that are related to ageing
4.91

The attribute with the lowest agreement score was:

- Living a very long time
3.66

For Australian respondents, agreement was highest for the following three statements:

Mean (1-6)

- Remaining in good health until close to death
5.53
- Able to make choices about things that affect how you age
5.52
- Able to act according to own inner standards and values
5.47

Similar to their Hong Kong counterparts, Australian elders strongly disagreed that 'living a very long time' (Mean=4.06) was as essential to successful ageing as the other 19 meanings included in the questionnaire.

The results suggest that elders in both countries value good health and the ability to deal with challenges associated with ageing over longevity, particularly with regards to the meaning of ageing successfully.

5.3 How learners and non-learners differ in their background characteristics

A series of chi-square analysis was carried out for both samples to ascertain the relationships between their background characteristics and status as being learners or non-learners. In summary, learners and non-learners in Hong Kong differed by a number of background characteristics including age, gender, education level, whether they volunteered, and self-assessed financial state. Individuals who were more likely to engage in organized learning in the previous six months were women, below the age of 70 and those financially well-off. The findings are in line with previous research, showing that women (below the age of 70), with better financial circumstances, who volunteer and are financially well off are more likely to engage in learning [40]. However, the results were different for the Australian sample. Only three significant differences appeared between the learning and non-learning group, including education, employment, and volunteering. Gender, age, and financial differences were not significant

among this group of Australian elders as far as their engagement in organized learning during the previous six months was concerned. From the chi-square results, it emerged that learners in the Australian sample were more likely to be better educated, currently engaged in volunteering, and in part- or full-time employment. As a result, the two background characteristics that were found common to both the Australian and Hong Kong learner groups were education level and volunteering.

5.4 Meanings ascribed to later life learning

Among Hong Kong participants, highest levels of agreement emerged for the below three meanings of elder learning:

Mean (1-6)

- Learning is the broadening of my horizons
5.06
- Learning keeps me healthy physically and mentally
5.02
- Learning is the acquisition of new knowledge or skills
4.97

Similar results were observed for the Australian respondents with respect to two items, but they differed from their Hong Kong counterparts in being more prone to conceive learning in later life as part of a process that continues throughout all stages of the life span:

Mean (1-6)

- Learning is a lifelong process at any stage of life
5.41
- Learning is the acquisition of new knowledge and skills
5.31
- Learning is the broadening of my horizons
5.28

Lowest agreement scores were found for the same two items in both samples:

	Hong Kong	Australia
- Learning allows me to continue employment after retirement	3.36	3.03
- Learning is obtaining a qualification for re-employment/re-skilling	3.22	3.07

The instrumental view of learning to gain employment or qualifications was conceived by elders from both samples as being less important compared to other meanings of learning at their current stage of life. Table 3 summarizes the results for the different meanings of learning as conceived by both Hong Kong and Australian participants.

Table 3. What does learning mean to you at this stage of your life?

		Hong Kong Sample	Australian Sample
		Mean (1-6)	Mean (1-6)
1	*Learning is the acquisition of new knowledge or skills.*	*4.97*	*5.31*
2	Learning is making adjustments to overcome the challenges of later life.	4.65	4.78
3	Learning is the right to education even at old age.	4.80	5.15
4	*Learning is the broadening of my horizons.*	*5.03*	*5.28*
5	*Learning is obtaining a qualification for re-employment or re-skilling.*	*3.22*	*3.07*
6	Learning is the search of meaning in life.	4.47	3.75
7	Learning is the intellectual pursuit of an area/subject of interest.	4.70	4.92
8	Learning keeps me busy and active.	4.57	5.05
9	*Learning is a lifelong process which should happen at any stage of life.*	4.89	*5.41*
10	Learning makes me feel I am in control of my life.	4.69	4.90
11	Learning makes me feel useful and productive even in old age.	4.84	4.90
12	Learning is a reflective process that makes me think about the purpose in life.	4.49	4.31
13	Learning equips me with the critical thinking skills for problem-solving.	4.48	4.89
14	*Learning keeps me healthy physically and mentally.*	*5.02*	5.19
15	Learning makes me become a virtuous person.	4.38	3.31
16	Learning gives me self-fulfillment and confidence.	4.78	4.75
17	*Learning allows me to continue employment or to re-join the workforce after retirement.*	*3.36*	*3.03*
18	Learning is living.	4.72	4.98

Remarks: The highest and lowest items are highlighted in italics. Participants rated their agreement on a 6-point Likert scale ranging from Strongly disagree (SD) =1 until Strongly agree (SA)=6.

5.5 Barriers to participation

Respondents were given 22 barriers that could possibly prevent their engagement in learning. Table 4 reports the results for both samples of elders.

		Hong Kong Sample	Australia Sample
		Mean (1-6)	Mean (1-6)
1	*Personal health reasons*	*4.36*	*3.77*
2	Health of a family member	3.90	*3.16*
3	Fear of change	3.30	2.12
4	Poor memory	3.93	2.77
5	Transportation difficulties	3.54	2.88
6	*Money (programmes are too expensive)*	*4.01*	*3.55*
7	Long travelling time	3.68	3.19
8	Care for family members	*3.77*	2.85
9	Lack of family support	3.14	2.17
10	Lack of confidence in my learning ability	3.46	2.48
11	Low educational background	3.49	2.15
12	No time because of other commitments	3.63	3.30
13	Could not get into the courses I wanted	3.76	2.40
14	Could not meet the admission requirements of the courses	3.63	2.22
15	*Did not feel welcome on campus*	*2.76*	*1.91*
16	Too much reading and homework	3.32	2.48
17	Difficulty with studying or retaining information	3.84	2.80
18	Lack of motivation	3.52	2.92
19	Administrative bureaucracy	*3.53*	*2.53*
20	*Bad experience at school before*	*2.98*	*1.93*
21	Lack of information about what is available	3.52	2.60
22	Insufficient offerings of interest to me	3.70	2.81

Table 4. Barriers to participation in learning

Remarks: The highest and lowest items are highlighted in italics. Participants rated their agreement on a 6-point Likert scale ranging from Strongly disagree (SD) =1 until Strongly agree (SA)=6.

Both samples of elders rated the same two barriers most highly:

	Hong Kong	Australia
- Personal health reasons	4.36	3.77
- Money (programmes are too expensive)	4.01	3.55

As to the barriers that were least likely to be endorsed, responses from the two groups were also the same.

	Hong Kong	Australia
- Did not feel welcome on campus	2.76	1.91
- Bad experience at school before	2.96	1.93

With reference to the typology of barriers by Cross [39] and Darkenwald & Merriam [40], who classified learning barriers into dispositional, situational, and institutional ones, it seems that situational barriers posed more of a problem to older learners in both study locations, and barriers related to bad experiences within educational institutions caused the least concern.

5.6 Learning interests

Participants were presented with 12 subject areas to reflect their learning interests. The subject areas that were rated the highest were the same for both samples: Health, Leisure and Art. The least preferred subject areas for the Hong Kong group were: Humanities (e.g. politics and history), Sciences (e.g. chemistry, astronomy, geography) and Finance (e.g. accounting, investing). The Australian group was least interested in Basic Education (e.g. primary/secondary), and Literacy and Grammar (e.g. native and foreign languages). The results indicate that older people in both locations wanted to learn about matters that were relevant and meaningful to their health and were related to leisure and personal development. However, differences regarding subject areas that were of less interest to elders were perhaps due to the fact that the Australian sample was generally more educated than the Hong Kong sample, so that they did not need to learn about grammar and literacy, nor gain a basic education (see Table 5 for the learning interests of the two samples).

Table 5. What do you prefer to learn?

		Hong Kong Sample	Australian Sample
a	Art (e.g. music, dance, photography, painting, crafts)	51.4%	46.3%
b	Literature (e.g. appreciation, drama, writing)	26.6%	26.2%
c	Sciences (e.g. biological, astronomy, geology, environment related)	14.3%	22.4%
d	Humanities (e.g. politics, history, sociology)	13.9%	38.4%
e	Technologies (e.g. computers, communications technology)	41%	41.3%
f	Leisure (e.g. home repairs, cooking, travel, gardening)	52.8%	48.1%
g	Health (e.g. nutrition, sports, fitness)	69.6%	44.4%
h	Personal development (e.g. self-discovery/improvement)	29.7%	24.7%
i	Finance (e.g. financial planning, investing)	15.8%	23.7%
j	Philosophy and religion (e.g. life and death, meaning in life)	21.2%	23.7%
k	Basic education (e.g. primary/secondary)	19.5%	4.3%
l	Literacy and grammar (e.g. native and foreign languages)	29.9%	17.7%

Remarks: The highest and lowest items are highlighted in italics.

5.7 Instructional preferences
Table 6 summarizes the most preferred ways to learn by the two samples.

Table 6. How do you prefer to learn?

		Hong Kong Sample	Australian Sample
a	*In a group*	*71.7%*	*57.4%*
b	With a mentor or tutor	37.6%	27.7%
c	*In a formal teacher-classroom situation*	*48.7%*	*20.9%*
d	*Do something hands on*	38.5%	*53.1%*
e	Watch informational television/videos or listen to radio/audio programmes	38.3%	36.3%
f	*Gather information then teach myself*	*15.2%*	24.2%
g	*Find self-study courses*	*13.9%*	*16.1%*
h	Take classes, seminars or workshops (at/not at a school, college or university)	22.4%	40.3%
i	*Read newspapers, magazines, books or journals*	*43.2%*	*54.9%*
j	Get involved in a community group or volunteer organization	41.4%	42.8%
k	*Educational travel*	*17.9%*	24.9%
l	*Online Learning*	*15.2%*	*20.7%*

Remarks: The highest and lowest items are highlighted in italics.

Of the three most preferred ways of learning, two learning methods were common to both samples - 'learning in a group' and 'read newspapers, magazines, books or journals.' The other most highly preferred way of learning for Hong Kong elders was 'in a formal teacher-classroom situation'; while the Australian counterparts liked to 'do something hands on.' Interestingly, the Australian group had selected the formal teacher-classroom as one of their least preferred ways of learning. However, the two groups had both selected 'find self-study courses', and 'online learning' as their two least preferred ways of learning. In addition, the Hong Kong group had indicated 'gather information then teach myself' as one of their least preferred choices.

5.8 Reasons for learning

Only participants who indicated that they had engaged in organized forms of learning in the past six months were then required to answer items regarding why they engaged in learning (see Table 7 for the various reasons of learning).

Table 7. Reasons for learning

		Hong Kong Sample (N=283)	Australian Sample (N=199)
		Mean (1-6)	Mean (1-6)
1	*Always wanted to go to school*	*5.00*	4.01
2	*For self-fulfillment*	*5.00*	*5.12*
3	For life enrichment	4.96	5.08
4	For leisure	4.92	4.36
5	To accompany family members or friends	4.07	3.08
6	*Interest in specific courses or subjects*	*5.00*	*5.28*
7	To keep myself busy and active	4.81	4.71
8	To keep up-to-date with society	4.87	4.73
9	To make new friends	4.74	3.99
10	*To acquire qualifications*	*3.78*	3.20
11	*To enhance my employability*	*3.04*	*2.44*
12	To enhance the ability to communicate with and integrate into other generations	4.74	4.14
13	To search for the meaning in life	4.61	3.14
14	To take advantage of free or cheap tuition	4.44	3.18
15	To contribute what I have learned to society	4.58	4.17
16	To adjust better to getting older	4.97	4.01
17	*To acquire new skills for re-employment*	*3.05*	*2.20*
18	To reflect on the purpose of life	4.04	3.08
19	To be an asset rather than a burden to society	4.51	4.06
20	*To learn new knowledge and skills*	4.75	*5.25*
21	To pursue a better quality of life	4.58	4.51
22	*To deal with a life event (e.g. death in family)*	4.08	*2.80*
23	To be a valued member of society	4.04	4.29

Remarks: The highest and lowest items are highlighted in italics. Participants rated their agreement on a 6-point Likert scale ranging from Strongly disagree (SD) =1 until Strongly agree (SA)=6.

Of the 22 reasons provided as options in the questionnaire, the three reasons that were rated highest by both groups of elder learners were as follows:

	Hong Kong	Australia
- Always wanted to go to school	5.00	
- For self-fulfillment	5.00	5.12
- Interest in specific courses or subjects	5.00	5.28
- To learn new knowledge and skills		5.25

However, the two reasons that were rated the least for both groups were:

	Hong Kong	Australia
- To enhance my employability	3.04	2.44
- To acquire new skills for re-employment	3.05	2.20

From their responses, it seems that elders from both samples who had recently engaged in organized learning were motivated to seek self-fulfillment or enrichment because they were interested in particular areas, and the desire to seek new knowledge and skills. However, respondents were not motivated as much by enhancing skills for better employability or re-employment.

5.9 Associations between learning and successful ageing, life satisfaction, health and happiness

Results from the correlation analyses show that for both samples, respondents' self-rating of successful ageing was significantly related to participation in learning, life satisfaction, happiness, and participants' overall health status (see Table 8 for the correlation results). ANOVA comparisons between the learner and non-learner group from Hong Kong regarding successful ageing and happiness suggested that seniors, who had recently participated in later life learning, were also more likely to rate themselves as ageing successfully (F=7.474, sig.=<.000) and to be experiencing higher levels of happiness (F=11.734, sig.=.001) than non-learners, but this was not the case for life satisfaction (F=2.275, sig.=.132) or health status (F=.538, sig.=.464). Thus, even though the learner and non-learner group were similar according to life satisfaction and health status, learners had an advantage over non-learners in terms of happiness and self-perceptions of ageing "well" or "successfully". For the Australian group, the ANOVA results showed significant differences between the learner and non-learn groups according to all well-being measures, including their self-reported success in ageing (F=4.384, sig.=.037), life satisfaction (F=7.146, sig.=.008), happiness (F=5.778, sig.=.017), and health (F=7.689, sig.=.006).

Table 8. Correlations between learning and successful ageing and well-being

		Hong Kong Sample	Australian Sample
		I am ageing successfully or ageing well	I am ageing successfully or ageing well
I am ageing successfully or ageing well	Pearson Correlation	1	1
	Sig. (2-tailed)		
	N	515	415
Overall, how satisfied are you with your life nowadays?	Pearson Correlation	.513**	.607**
	Sig. (2-tailed)	.000	.000
	N	514	415
Overall, how happy do you feel most of the time?	Pearson Correlation	.418**	.530**
	Sig. (2-tailed)	.000	.000
	N	513	415
For your age, in general how would you rate your health?	Pearson Correlation	.285**	.477**
	Sig. (2-tailed)	.000	.000
	N	511	415
In your opinion, how important is participation in continued learning to successful ageing?	Pearson Correlation	.314**	.245**
	Sig. (2-tailed)	.000	.000
	N	514	415

Remarks: ** Correlation is significant at the 0.01 level (2-tailed).

6. DISCUSSION

The focus of this research was comparing Hong Kong and Australian elders in terms of their background characteristics, engagement in learning, conceptualizations of ageing successfully and learning in later life, and other important learning issues, including reasons for learning, barriers, areas of interest, and instructional preferences. With respect to background characteristics, the two groups of elders were from two different cultural contexts, from which samples were drawn for the purpose of comparison. Surprisingly, there were in fact more similarities than differences between the two groups. There were more women in both samples (54.7% for Hong Kong, 60.5% for Australia), more older participants aged 70-75 and above took part in both studies (51.8% for Hong Kong, 61.7% for Australia), most of the participants were married (66.7% for

Hong Kong, 52.4% for Australia)[Note1], most of them reported having children (88.6% for Hong Kong, 84.8% for Australia), and more than half of them reported engagement in volunteering (61.3% for Hong Kong, 56.5% for Australia).

However, there are a few background characteristics that differed considerably. The Hong Kong sample was less well-educated with 77.8% at primary and secondary school level as opposed to 93.2% of the Australian sample who had completed their education at either secondary school, a technical institute or at university. With respect to dwelling or residence, most Hong Kong elders were found to be living with their family (75.3%) as opposed to 53.3% for the Australian sample. Though the majority of both samples were retired, the Australian sample reported a higher percentage of participation in full/part-time employment (18.8% for Australia, 5.3% for Hong Kong). With regards to financial position, more Hong Kong elders reported having

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[1] The two background characteristics were recoded as two dichotomous groups with Age: Group 1= 55-69 (48.1%), Group 2= 70-75 and above (51.8%); Marital Status: Group 1= Married (66.7%), Group 2= Non-married (33.4%).

a better financial status, with 86.4% of them assessing themselves to be "fairly well off" and "very well off", as compared to 61% of the Australian sample who said likewise about their financial position. Also, more Hong Kong elders perceived that they were valued by the community (92.5%) compared to Australian elders (75.1%). Finally, a slightly higher percentage of Hong Kong elders (54.5%) reported that they had engaged in organized learning during the previous six months than Australian elders (47.3%). Fig. 3 summarizes the differences in background characteristics between the two samples.

(INSERT Fig. 3 here)

Both groups rated learning as being very important during retirement or in later life, which was also found to be significantly related to their self-ratings of successful ageing, happiness, life satisfaction, and general health status. This finding is consistent with those from previous studies where participation in learning was connected to a greater chance of ageing successfully [1, 2, 4, 41-43].

With regards to their conceptualizations of ageing successfully, both groups saw the importance of 'remaining in good health until close to death' in the ageing process. The Hong Kong group also rated 'having a sense of peace' and 'adjusting to ageing' important. Within the Australian group, 'being able to make choices', and 'acting according to inner standards and values' were perceived to be important to successful ageing. Both groups considered 'living a long time' not important in the ageing process. The commonality between the two groups was that they both valued quality of life rather than quantity when it comes to successful ageing. However, it seems that the Australian group valued more the independent dimension of ageing, such that they were able to make choices and act according to their inner standards and values even in old age. The Hong Kong elders saw greater importance in adjusting to ageing and having peace of mind, which in their view, may help them cope better with ageing.

Regarding the meaning of later life learning, again, elders in both places shared similar, rather than different, views. Both samples valued 'the acquisition of new knowledge' and the 'broadening of horizons' most highly. But they differed in that Australian elders tended to conceive learning as a lifelong process, while Hong Kong elders were more likely to conceptualize learning in later life as having practical value in keeping them physically and mentally healthy. However, both groups saw little value in later life learning for the purpose of acquiring skills for employment or re-employment. These findings are consistent with previous research, where older adults favor learning in later life for expressive reasons, including gaining new knowledge and expanding of personal horizons [44, 45] rather than for instrumental or pragmatic purposes. With respect to instructional preferences, it seems that the Hong Kong group preferred more traditional ways of learning within a classroom environment and group learning; while the Australian group preferred to do things hands-on and least

preferred to learn in a formal teacher-classroom situation. However, both groups were similar in their dislike of the idea of solo learning, reflected by online learning and self-study courses being the least preferred ways of learning.

With regards to the barriers to their engagement in learning in later life, both groups of elders indicated that they were concerned more with situational barriers than institutional barriers. Although situational barriers such as personal health and financial condition are beyond the control of institutions, providers can still help to alleviate barriers concerning the level of fees to be charged for programmes or activities that are designed for older learners.

The fact that there are more commonalities, rather than differences, between the two samples of elders from two different cultures supports the claim that cultures very often overlap and coincide, and need not be seen as polarized, where becoming bi-cultural is possible [31]. It is therefore important for cross-cultural comparative research to identify cultural differences, while at the same time, to recognize the existence of similarities between cultures.

7. CONCLUSION

This present research adds to the existing knowledge regarding successful learning and elder learning in at least two separate ways. The first such way is through illuminating how elders themselves conceptualize learning and ageing, an area of enquiry that has received little research attention to date. This study provides insight into areas that can inform the efforts of education providers, policy makers and governments to encourage greater elder participation in learning as they proceed through old age. More learning opportunities and educational programmes need to be provided for older adults if their chances of ageing successfully are to be maximized. The ultimate success of efforts aimed at this objective will necessarily rest on due attention being given to what older people themselves have to say about what motivates or inhibits their participation in learning, as well as their needs, interests, and instructional preferences. The findings from this study suggest that older learners differ from learners of other age groups in significant ways, particularly in terms of their reasons for learning. They predominantly wish to learn for expressive and not instrumental purposes such as re-skilling as a means to gain employment or qualifications, and this needs to be given due attention by those who seek to provide learning opportunities to older people.

The second unique aspect of this study is its focus on learning in later life across two different cultural locations: Hong Kong and Australia. To date, there has been a lack of international research examining the influence of cultural differences upon elder learning, and very little research has explored learning for and by elders from their perspectives, and across different cultural contexts. This cross-cultural, comparative study has been able to examine and research the differences, as well as commonalities, of elders' conceptualizations of learning, their involvement in elder

learning, and important learning issues including interests, instructional preferences, as well as the barriers to their participation. The findings provide evidence of more similarities than differences between elders in Hong Kong and Australia, but those differences that were found have the potential to inform the development of programmes and other learning opportunities in ways that are likely to attract older people in both Hong Kong and Australia, and thus increase the likelihood of their participation in them.

The research has limitations though. Survey data gathered from the two groups of elders, one from Hong Kong and another from Australia, were used primarily for within-group analysis relying on descriptive statistics to report the differences between the two groups. There is however a lack of comparative analysis between the two cultural groups based on a single dataset. Hence, there is a need for further analysis to provide an essential cross-cultural appreciation of learning by senior elders across two cultures to contribute to the international understanding and knowledge base for learning in later life. More specifically, the outcomes of the comparative study would provide policy makers and researchers in Hong Kong and Australia with sound empirically supported theory and comparative data for the growth of policy and practice aimed to the preparation and delivery of programmes for learning in later life.

CONFLICT OF INTEREST

Declared None.

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Appendix
Learning and Ageing Survey 2013

Part 1 – Background statistics

Gender, age (55-59, 60-64, 65-69, 70-74, 75 and above),
marital status, having children or not, education attainment,
living circumstances, employed (part-time or full-time) or
retired, whether respondents volunteer, financial status, and
perceived worth by community ('As an older person how
valued by people in the community do you personally
feel?').

Part 2 – Learning in older adults

Learning engagement
- The "learners" – participated in organized learning
  (formal/non-formal) in the previous 6 months
- The "non-learners" – not participated in organized
  learning in previous 6 months

Reasons for learning
- Only those who responded to engaging in organized
  learning were required to complete the list of 23 reasons
  which were adapted from Scala [50] and Sloane-Seale
  & Kops [40]. Participants rated their agreement on a 6-
  point Likert scale ranging from Strongly disagree (SD)
  =1 until Strongly agree (SA)=6.
- Reasons included: 'always wanted to go to school', 'for
  self-fulfillment', 'to make friends', 'to acquire
  qualifications', 'to search for meaning in life', 'to learn
  new knowledge and skills'.

Barriers to participation

- A total of 22 barriers, theoretically classified into 3
  types of barriers, Dispositional, Situational, and
  Institutional, were modified from Scala [46] and
  Sloane-Seale & Kops [36]. Participants rated their
  agreement on a 6-point Likert scale ranging from
  Strongly disagree (SD) =1 until Strongly agree (SA)=6.
- Examples of barriers:
  Dispositional: 'lack of confidence in my learning
  ability', 'poor memory'
  Situational: 'personal health reasons', 'care for family
  members'
  Institutional: 'could not get into courses', 'could not
  meet admission requirements'.

Learning interests and preferences
- 12 subject areas were presented to participants to
  specify their learning interests. Examples include Art
  (e.g. music, dance, photography, painting, crafts),
  Technologies (e.g. computers, communications
  technology), Health (e.g. nutrition, sports, fitness),
  Basic education (e.g. primary/secondary), etc.
- 12 different ways of learning were provided to
  participants to reflect their learning preferences.
  Examples include 'in a group', 'in a formal teacher-
  classroom situation', 'watch informational
  tv/videos/audio programmes', 'self-study', 'educational
  travel', etc. Both lists were adapted from Sloane-Seale
  & Kops [36].

Importance of learning
- 'How important learning is in your retirement or in your
  later life?' (Very important/Fairly important/Average
  importance/Fairly unimportant/Very unimportant/Don't
  know)

Meaning of elder or later life learning
- A total of 18 items, conceptually constructed and self-
  developed for the present study, was given to
  participants to convey what learning in later life means
  to them. Participants rated their agreement on a 6-point
  Likert scale ranging from Strongly disagree (SD) =1
  until Strongly agree (SA)=6. Examples of meaning:
  'learning is acquisition of new knowledge or skills',
  'learning is making adjustments to overcome the
  challenges of later life', 'learning is the right to
  education even at old age', 'learning is the broadening
  of my horizons', 'learning is obtaining a qualification',
  'learning is the search of meaning in life'.

Part 3 – Successful ageing and well-being

Perceptions of ageing and successful ageing
- Do you perceive ageing as positive or negative in life,
  or in between? (Very positive/Fairly positive/In
  between/Fairly negative/Very negative/Don't know).
  This measure was derived from Phelan et al. [17].

Meaning of successful ageing
- A list of 20 items was modified from Phelan et al. [17]

for participants to reflect their agreement with each of the attributes for ageing successfully. The list was adapted by deleting the item, 'Being able to cope with the challenges of your later years', and replaced with an item about the present financial state of the respondent, which was viewed important to successful ageing in previous research, e.g. Strawbridge [51]; Sloane-Seale & Kops [36]. The item that was replaced was viewed to be similar to another item, 'Adjusting to changes that are related to ageing.' (See Table 2 for the full list of meanings.)
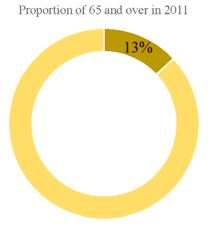
Self-evaluation of successful ageing
- 'I am ageing successfully or ageing well' (Strongly agree/Agree/Slightly agree/Slightly disagree/Disagree/Strongly Disagree). This measure was derived from Phelan et al. [17].

Self-reported well-being and health
- 'Overall, how satisfied are you with your life nowadays?' (Extremely satisfied/Very satisfied/Satisfied/Unsatisfied/Very unsatisfied)
- 'Overall, how happy do you feel most of the time?' (Happy and interested in life/Somewhat happy/Somewhat unhappy/Unhappy with little interest in life/So unhappy that life is not worthwhile)
- 'For your age, in general how would you rate your health?' (Excellent/Good/Fair/Poor/Bad)
- 'In your opinion, how important is participation in continued learning to successful ageing?' (Very important/Important/Somewhat important/Little importance/No importance)

These questions were derived from Sloane-Seale & Kops [36].

Hong Kong Population
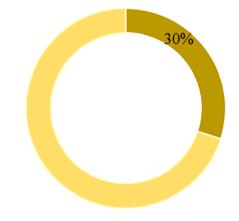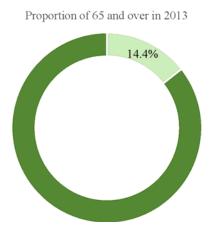# (7.22 million in 2013)

Proportion of 65 and over in 2011

13%

Proportion of 65 and over predicted in 2041

30%

Fig. 1 Hong Kong Population and Proportion of 65 and over

Australian Population
(23.1 million in 2013)

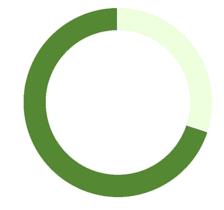Proportion of 65 and over in 2013

14.4%

Proportion of 65 and over predicted in 2041

Fig. 2 Australian Population and Proportion of 65 and over