A Review and Critique of the Portrayal of Older Adult Learners in Adult Education Journals, 1980-2006

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The aging population is a worldwide challenge. Understanding how older adults have been portrayed would provide a foundation on which future scholarship can build. This study assesses and critiques the assumptions underlying the portrayal of older adults and their learning in adult education journals from 1980 to 2006. On reviewing 93 articles in five adult education journals, three themes emerge. First, older adults have been portrayed as a homogeneous group in terms of age, gender, race, class, ethnicity, and able-bodiedness. Second, older adults have been viewed as capable and motivated learners with few cognitive or physical limitations. Third, programmatic responses have been driven by the life context of older adulthood. Of the 93 articles reviewed, 26 are empirical studies. The findings are discussed and suggestions presented for future research and scholarship on older adult learners.

Keywords: older adult; adult learner; aging; adult education

The “demographic ‘revolution’” (Fisher & Wolf, 2000, p. 481) regarding the aging and graying of America grows by the day. In the conclusive statement of a major longitudinal study headed by the National Institute of Aging, it is proclaimed that “the aging of the population and the retirement of the baby-boom generation are considered by many to be among the most transformative demographic changes ever experienced in this country” (Health and Retirement Study, 2007, Conclusion section, para 1). Significant statistics are frequently alluded to in support of this aging crisis. For instance, in year 2000, people 65 years and older comprised 12.4% of the whole population, where this percentage is projected to increase to 19.6 by year 2030. This is to say that in 2000, there were 35 million adults more than 65
years of age, which will rise to 71 million by 2030 (U.S. Bureau of the Census, 2004). In 2030, almost one of five persons will be more than 65 years old.

A further undeniable aspect of this aging in America is that not only are a substantial number of people living longer but they are living longer in good and functional health. Moreover, according to the Health and Retirement Study (2007), there is also an increase in the level of educational attainment in successive generational cohorts of older adults in America. And as most adult educators are aware, the best predictor of continuing participation in learning is the educational level of the adult learner (the higher the learner’s educational level, the higher the likelihood of engaging in additional educational and learning activities) (Merriam, Caffarella, & Baumgartner, 2007).

Propelled by these factors, the older adult population has become an important focus of adult education programming and research. But how well are older adult learners understood by adult educators and researchers in adult education? It stands to reason that the quality of research and educational program planning will hinge on researchers’ and practitioners’ views toward older adult learners. In other words, assumptions about older adult learners can either enhance or limit the research agenda and practical engagement with older adult learners. Uncovering how older adults have been portrayed in the adult education literature, past and present, would provide a foundation on which future scholarship can build. Consequently, the purpose of this article is to critically review the portrayal of older adult learners in research and practice journals of adult education toward revealing prevailing assumptions about older adulthood and older adult learners. Themes and trends that have characterized scholarship concerning older adult learning will be identified, followed by suggestions for further research.

Older Learners and Adult Education

Life-stage characteristics and age-related changes in adulthood have historically been attended to by educators involved in designing programs for adults. Dating back to the first empirical study of adult learning published in 1928 by Thorndike et al., there has been an awareness of the effects of aging on learning. However, attention to older adults as a segment of the life span for which we might develop programs was somewhat sporadic until the early 1970s when Howard McClusky established the first graduate program in educational gerontology at the University of Michigan and also authored an important background paper for the 1971 White House Conference on Aging. In this paper he pointed out that education was one of the more optimistic areas of gerontology "because of its faith in the learning ability of older persons, and because of its confidence in the improvement that results from learning" (McClusky, 1973, p. 10). Identifying older adult learners as a separate area
of research and practice was further advanced with Peterson’s (1978) conceptualization of educational gerontology to include “(1) educational endeavors for middle-aged and older people; (2) public education about aging . . .; and (3) preservice and inservice education of professionals and practitioners for work in the field” (p. 61). Another marker in the development of educational gerontology was the launching of a journal in 1976 devoted to this topic, *Educational Gerontology*.

Within the field of adult education itself, handbooks published approximately every 10 years since 1934 offer us a window on attention devoted to older adult learners. Beginning with the 1948 handbook, which has a chapter titled “Adult Education and Later Maturity,” all subsequent handbooks except for 1970 have chapters on older adult learners (1960, 1980, 1989, 2000). In addition to these handbooks, there are a number of books on older adulthood written by adult educators (Beatty & Wolf, 1996; Findsen, 2005; Fisher & Wolf, 1998; Glendenning, 2000; Jarvis, 2001). Much of the writing in adult education sources is descriptive, attending to the growing numbers of older adults, their learning capacities, needs and interests, and program responses. As Findsen (2005, p. 21) observed, “The predominant preoccupation has been describing what is rather than what could or ought to be.” Recent scholarship calls for a more critical approach. Fisher and Wolf (2000), for example, write that educational providers are challenged:

To provide opportunities for older adults to become conscious of the cultural dimension of messages about aging, to assess their validity on the basis of individual experience and broader research, and to develop their own perspective. Put simply, it is the process of engaging older adults in dialogue to enable them to discover their own meaning, identity, and purpose in the face of cultural messages about aging. (p. 489)

Our purpose in reviewing articles on older adults in adult education journals is to critically assess the portrayal of older adult learners toward ascertaining prevailing assumptions, to identify themes and trends that characterize the literature, and to suggest areas for future scholarship.

**Method**

**Database**

We made several decisions with regard to the database to be used for our analysis. First, we decided that we would focus on articles spanning the 26-year period from 1980 through 2006, reasoning that this 26-year period would be a long enough time period to identify trends and issues. Second, just as adult educators might be interested in how women (Hayes & Smith, 1994) or African Americans have been portrayed in adult education journals rather than journals dedicated to these groups,
we decided that we wanted to review articles in mainstream journals in adult education so that we could see how older adults were portrayed within the context of the broad field of adult education; this criterion eliminated gerontology-specific journals such as *Educational Gerontology* or *The Gerontologist*. The major adult education journals that were selected for this analysis were *Adult Education Quarterly*, *Adult Learning* (*Lifelong Learning* until mid-1989), *Adults Learning* (United Kingdom; *Adult Education* until mid-1989), *Canadian Journal for the Study of Adult Education* (except issues from 1989 to 1994, which we were unable to access), and the *International Journal of Lifelong Education*.

It was felt that this mix of research and practice-oriented journals would contain articles representative of perspectives of older adults in relation to adult education. Articles were selected for review if older adults were the sole focus, or if older adults were an identifiable segment of a larger research population. Our final data set consisted of 93 articles. Of the 93 articles, 44 were from 1980 to 1989, 32 were from 1990 to 1999, and 17 articles were from 2000 to 2006. Twenty-six articles we classified as empirical research; that is, these articles reported on data collected in studies with older adults. The remainder, 67 articles, we classified as “descriptive.” It should also be noted that the majority of articles represented a North American rather than European or Australian perspective.

**Data Analysis**

Qualitative content analysis was used to analyze this database. Qualitative content analysis as described by Altheide (1987) and Patton (2002) was used to generate themes or categories responsive to our research questions. This is basically an inductive process involving constant comparison within, between, and among the articles that were our data source. Our analysis of each article was guided by the following questions: What assumptions underlie the portrayal of older adults and learning in older adulthood? What topics relevant to older adulthood and adult education were addressed? What characterized the empirical research? What issues and trends did we see unfolding over this 26-year period?

Copies of the 93 articles were made for each member of the research team. We worked with the articles by decade; that is, we first analyzed the 44 articles published in the 1980s. Each of us read the articles individually, taking notes in response to the questions that guided our analysis. We then met as a group and worked through each of the articles in that decade. From the 1980s decade, we developed tentative themes, findings, and categories that we felt captured the content of the articles and also responded to our research questions. Differences among the researchers were discussed and resolved by returning to the particular articles in question. We worked through this process until consensus was achieved. We followed this same process for the 32 articles published in the 1990s and the 17 articles published
between 2000 and 2006. Categories were refined as we worked through the decades. After our decade-by-decade analysis, we met several times, further discussing and reflecting on the data set as a whole.

Findings

We have organized our findings into two sections. First, we present an overview by decade of the literature; that is, we describe generally what the literature regarding older adults and learning and education consisted of in the 1980s, 1990s, and 2000-2006. We then present our findings regarding the portrayal of older adults and learning and adult education across the five journals reviewed for this article.

Decade Overview

To provide a clearer picture concerning what has been done in aging-related studies in the field of adult education for the past 26 years, we provide a brief summary in terms of topics and methods by decade.

In the 1980s, we found topics could be categorized into three main categories: educational experiences and participation of older adults, instructional designs and strategies, and descriptions of educational programs for older adults. There were a few articles that discussed related policies and called attention to this group's needs. Authors explored and described learning needs or wants, participants' characteristics, and the obstacles and benefits of educational participation for older adults. Fisher's (1986) survey on identifying predictors of learning of active old adults and Murray's (1981) comparison of reading needs and preferences between institutionalized and noninstitutionalized older adults were two typical examples of this category.

A discussion of instructional designs and strategies was another main research category in the 1980s. Under this category, researchers described possible philosophies, strategies, evaluation, and models for teaching older learners. Jarvis's (1980) descriptions of designing and analyzing preretirement education and Yeo's (1982) mentioning "eldergogy" were two examples of this topic focus.

Introducing educational programs for older adults was also a main focus in this decade. Examples include a Luncheon Club for older adults with mobility difficulties (Street, 1982), a drawing class for institutionalized old residents (Davies, 1984), writing and discussing poetry for undereducated older adults who lived in a rural community (Kazemek & Rigg, 1985), and Elderhostel programs (Brady, 1983; Burrow, 1985; Wacks, 1989).

Four articles proposed some suggestions and reviews to advocate for the significance of older adult education. Five articles could not be categorized as a group so
we put them as “others,” such as Thorson’s (1989) argument about the significance of a parent-care class. In terms of research methods, it appeared that description was the dominant mode in the 1980s. Among the 44 articles we reviewed in this decade, only 12 were data-based studies.

The focus of article topics in the 1990s was different. Compared with the 1980s, only three articles discussed older adults’ educational participation. Bornat and her colleagues (1993), Fenimore (1997), and Walker (1998) respectively portrayed the learning experience and barriers of older women, centenarians, and learners at U3A. Wolf’s (1992) depiction of a life review workshop for older adults was the only article in the 1990s to mention instructional strategies for older learners. This change in focus might be explained by several events of the 1990s. The European Year of Older People and Solidarity Between Generations was launched in 1993, the Carnegie Third Age Inquiry Reports were conducted from 1991 to 1993, and 1999 was the United Nations International Year of Older Persons; these events resulted in a shift to articles in the 1990s that were more reflective on contexts and projects for older adults’ learning. Many authors focused on the whole societal context and proposed reviews, commentaries, and suggestions on implementations of educational opportunities for older adults. Adults Learning’s special issue in 1993 (vol. 5, no. 4) is representative of this trend. In this issue, for example, Harrison (1993) pointed out that the political climate made education for older adults to have only “slogan status” because of no exclusive funding and legislation (p. 95).

As with the articles in the 1980s, the descriptions of educational projects and programs for older adults were still a main topic in the 1990s (Bass, 1992; Carter, 1993; Swindell, 1997). Lastly, eight articles could not be classified as a group, so we put them as “others,” such as discussing learning for older ethnic minorities (Dadzie, 1993), building a development framework of older adulthood (Fisher, 1993), and the functions of museums for older adults (Reynolds, 1997). In terms of methods, among the 32 articles we reviewed in this decade, only 6 were empirical studies.

Moving into the 21st century, we saw similar topics in terms of older adult learning except for one new cluster. In terms of educational participation, compared with the 1980s and 1990s, articles in this category from 2000 to 2006 displayed a more varied picture. Schuller (2003) used a market viewpoint to depict the possible needs, contents, and providers for older adults’ educational participation. Swindell (2002) and Perigo (2006) provided respectively issues associated with educational participation with isolated older online learners and aging leadership groups at the workplace.

In terms of articles about projects or programs that were specifically designed for older adults, Narushima’s (2004) introduction of the Raging Grannies, groups of female social activists who are 50-plus, and Hentschel and Eisen’s (2002) description of The Third Age Initiative, a program designed to give older adults opportunities to connect with and contribute to communities, provide impressive examples. Compared with the 1980s and 1990s, no articles discussed instructional strategies for older learners. Also, no articles were classified under the “others” category. Instead, a new
Table 1
Summarized Characteristics of the Aging-Related Articles Reviewed From January 1980 to December 2006

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<tbody>
<tr>
<td>Number of articles reviewed</td>
<td>44</td>
<td>32</td>
</tr>
<tr>
<td>Main topic or focus of articles (with the number of articles)</td>
<td>Educational participation (15)</td>
<td>Commentaries, reviews, and suggestions on implementation of older adults’ education (11)</td>
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<td></td>
<td>Descriptions of educational programs (13)</td>
<td>Descriptions of educational projects or programs (9)</td>
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<td></td>
<td>Instructional designs and strategies (7)</td>
<td>Educational participation (3)</td>
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<td></td>
<td>Commentaries, reviews, and suggestions on implementation of older adults’ education (4)</td>
<td>Nature of Learning (4)</td>
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<td></td>
<td>Others (5)</td>
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<tr>
<td>Type of articles</td>
<td>Description (32)</td>
<td>Description (26)</td>
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<td></td>
<td>Empirical studies (12)</td>
<td>Empirical studies (6)</td>
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Cluster—exploring the nature of learning—emerged. Merriam and Mohamad (2000) investigated the nature of learning based on eastern cultural contexts, Withnall (2001) explored female older workers’ learning styles, Fuller and Unwin (2005) tried to understand how people learn at the workplace, and Roberson and Merriam (2005) dealt with the nature of self-directed learning of rural older adults. In terms of research methods, among the 17 articles we reviewed in this decade, the amount of descriptive articles (9) and empirical studies (8) were about equal.

In Table 1, we summarize the characteristics of the articles, by decade, in terms of number of articles, main topics, and type of article (descriptive or empirical).

Themes Across the Literature

An analysis of the 93 articles published between 1980 and 2006 revealed the following general themes: First, older adults are portrayed as a homogeneous group; second, older adults are seen as capable and motivated learners; and third, programmatic responses are driven by the life context of older adulthood.

Older adults portrayed as a homogeneous group. With few exceptions, older adults in the adult education literature are treated as a homogeneous group, alike in
age, gender, able-bodiedness, socioeconomic status, race, and ethnicity. The diversity among older adults on any of these dimensions is only occasionally referred to, even in the most recent literature.

Beginning with age, interestingly, the majority of articles do not indicate any age or age range at all; rather, the discussion is about “the elderly” or “elders” (Jarvis, 1983; Ostwald & Williams, 1985; Yeo, 1982), “older adults” (Fuller & Unwin, 2005; Murray, 1981), “the aging” (Peterson, 1981), “retired” (Metropoulos, 1980), “old people” (Kazemek & Rigg, 1985), “seniors” (Cusack & Thompson, 1996), “the other side of sixty” (Walker, 1980), or some combination of these used interchangeably. Most empirical studies (but not all) where older adults have participated in surveys or interviews do specify the age range and mean age of study participants. It is interesting to note that the minimum age for inclusion in some of these studies is fairly young, often 50 or 55. One author acknowledged age differences among older adults, pointing out that “the fastest growing segment of our population is the group aged 86+” (Thorson, 1989, p. 19). Another study (Fenimore, 1997) was on a special age segment—centenarians between 100 and 106 years old.

A couple of writers point out the difficulty in assigning a chronological age to this group, preferring instead to refer to this stage in life as “retired” or “post-work” (Withnall, 2006). Fisher’s (1993) study of developmental changes among older adults identified five periods of older adulthood, but these five periods were age independent. He concludes that “it is impossible . . . to predict the age at which a person may experience any period,” which suggests that using chronological age is less helpful in “describing an older adult” than developmental period (p. 88). In discussing policy from a lifelong learning perspective, Glendenning (2001) raises the issue of assigning age at all, “whether older adults should be considered separately from adults in general. Some adult educators regard the practice as ageist and ghettoizing older people” (p. 65).

Although there may be persuasive reasons for not specifying chronological age, it is curious why gender is rarely mentioned. We know that there are more older adult women than men, and that this ratio increases with age. For example, in the United States for all adults 65 years and older, 42.7% are males and 57.3% are females (U.S. Bureau of the Census, 2005a). The disparity in prior education, work experiences, and possibly health between men and women would suggest different learning needs and interests and consequently different educational program planning. Only one empirical study was found with women as the focus. Wolf (1986) studied older women in religious life and the use of reminiscence and life review for growth and development. Three descriptive articles focused on women (Bornat et al., 1993; Narushima, 2004; Walker, 1991).

Another aspect of this homogeneous picture of older adults is the assumption that all are able-bodied and physically mobile. A special issue of Adult Learning (Vol. 1, No. 3, 1989) on older adults paints a picture of healthy, active retirees engaged in formal learning at universities and in Elderhostel, second careers, international travel,
and so on. In yet another article presenting a “statement” from a seminar on aging in the United Kingdom, the diversity of older adults is recognized—“the elderly may be young and active or dependent and weak” (Groombridge, 1982, p. 316). Yet:

Men and women are able to overcome the obstacles and hardships of their physical and social environment through their capacity to compensate for weaknesses and deficiencies. This capacity continues into old age: they are able to make up for a diminution of physical functions through a continuous growth in learning and by a deepening understanding of the meaning of life. (p. 316)

As with all these generalizations about the homogeneity of older adults in the literature we reviewed, there are some exceptions with regard to this dimension of able-bodiedness. Murray’s (1981) study of older adults and reading compared the reading preferences and needs of older adults living in the community with those in a nursing home. Street (1982) described a program of luncheons and education for those who “suffered from degrees of immobility” (p. 358) and were semiisolated in the community. Castle and Selby (1987) conducted an oral history project with residents of a sheltered accommodation whose physical infirmity prevented independent living. In another study, the authors report the experiences of older adults learning to use computers, some of whom were “physically frail” (James, Gibson, McAuley, & McAuley, 1996, p. 52).

The last dimension of the homogeneity of older adults in this literature base to be discussed is the socioeconomic status, race, and ethnicity of older adults. An unexamined assumption through nearly all of the literature is that these older adults are white and socioeconomically middle, if not upper middle, class. They can afford to retire and have had life experiences and education that allow them to feel comfortable participating in continuing education, travel, and second careers. One article on retirement begins:

We often say there is a mystical freedom about the entry into retirement if one can just take advantage of it. It is as if you suddenly became independently wealthy. You have a basic financial support system in place, so you can do what you want with your life. The secret is probably to be as venturesome as in youth and to take advantage of this freedom. (Kreitlow & Kreitlow, 1989, p. 10).

As another example, Cusack and Thompson’s (1996) leadership training program for older adults sets the context as follows: “With the growing population of healthier and better-educated retired people, seniors centers are becoming ‘big business’—the business of helping older adults to create more satisfying and meaningful lives during their retirement years” (p. 21).

A few writers do acknowledge the diversity of the older adult population in passing; however, only four articles were uncovered that actually focused on other than
white middle-class adults. In the 1980s, two research articles were published, one on literacy skills (Heisel & Larson, 1984) and another on learning efforts (Heisel, 1985) of urban Black older adults. The sample for both studies was 132 urban Black men and women having a mean educational attainment of six grades. Heisel (1985) notes that “the characteristics of the sample indicated that from either a socio-economic or an educational perspective ... respondents were among the most severely disadvantaged” (p. 4). Another article in the 1980s reported on the training of Hispanic older adults to work in child care settings (Landerholm & Nelson, 1985). The fourth article to feature older adult diversity is a study of older adults in Malaysia and how culture shaped their learning (Merriam & Mohamad, 2000). Finally, there were a couple of articles that addressed older adults in rural settings (Roberson & Merriam, 2005; Swindell, 2002).

In summary, the literature on older adults since 1980 portrays a rather homogenous group in terms of age, gender, able-bodiedness, socioeconomic status, and race or ethnicity. With few exceptions, all older adults are just “older,” active, healthy, able to retire comfortably, and are white and middle to upper middle class.

**Older adults as capable and motivated learners.** Older adults in the adult education literature are treated, for the most part, as capable learners whose learning abilities are unimpaired and who readily participate in learning activities. In most cases, the literature emphasizes older adults’ capabilities to join a variety of educational activities and does not consider age-related changes in cognitive and physical abilities that some older adults may have. In addition, older adults are portrayed as learners who voluntarily and proactively take part in diverse learning activities.

Because the literature emphasizes a rather homogeneous picture of older adults who are able-bodied and physically mobile, age-related changes in learning abilities that some older adults may have are not considered in most cases. Most older adults have experienced some age-related changes such as cognitive and sensory problems, difficulties that can be lightened by learning strategies or environments. However, with few exceptions the literature overemphasizes older adults’ unimpaired learning abilities and does not take into account age-related changes that might inhibit some older adults’ learning processes. Bass (1986), for example, overstressed older adults’ able-bodiedness and suggested that older adults’ age-related declines in body can be overcome easily: “The most prevalent conditions are: arthritis, hypertension, hearing impairment. . . . Nevertheless, these conditions, although troublesome, are for the most part not debilitating and can be managed during routine daily activities” (p. 6). Walker (1980) also argued that “great involvement in educational and socio-cultural activities in later life reduces the effects of various difficulties often faced in the declining years” (p. 154).

However, some articles did articulate older adults’ age-related changes and the need for adult educators’ attention to addressing such changes. Ostwald and Williams (1985) assessed factors affecting older adults’ abilities to learn, such as cautiousness, common chronic disease, and hearing and visual acuity loss and suggested a model that modified learning conditions for older adults. Jarvis (1980) suggested that adult
educators should consider the psychological concerns that older adults bring to the classroom, such as doubting learning abilities or feeling themselves to be too old. Yeo (1982) introduced a systematic approach to teach older adults effectively that considers older adults' needs and their physical, psychological, and cognitive functions. According to James et al. (1996), age is not a barrier to learn how to use computers, but older adults do need to receive special assistance to overcome their slower learning speed and uncertainty toward computers.

Second, the majority of articles assume that older adults are motivated learners who actively participate in a variety of learning activities. Merriam and Mohamad (2000) described older Malaysians as active learners who seek learning opportunities in their everyday lives. For example, a 70-year-old participant learned English informally from her children and grandchildren and learned songs and poetry from radio programs. By introducing an educational program to improve older adults' community leadership, Hentschel and Eisen (2002) described older adults as active learners who seek opportunities to refine their skills for community leadership and who wish to be involved in society in a meaningful way. Roberson and Merriam (2005) described rural older adults' processes of self-directed learning and emphasized older adults' active roles in pursuing learning activities. Shea and Tidmarsh (1981) also described older adults as proactive learners who control their decision to participate in learning activities:

The elderly have lived long enough to know themselves and self-selection ensured that those who came could cope. Nearly all had great enthusiasm and energy to mach it. It was sensible as well as appropriate to make the entire program quite voluntary. (p. 368)

Chene and Sigouin (1995) described older adults as follows: "The older adults participating in the educational activities are highly motivated by a quest for learning. At the core of their involvement lies a desire to acquire knowledge, to cultivate and develop themselves" (p. 435). It is interesting to recognize how much even centenarians are eager to learn regardless of their physical limitations. Fenimore (1997) maintained that centenarians are actively involved in learning through hearing people's talking, going out, watching TV, or reading newspapers.

Only a few articles portrayed older adults as some group of people who need to be motivated to participate in learning activities. Fisher (1986) compared participants with nonparticipants and found that participants are more aware of learning needs and sites where educational activities are available. This study concluded that to encourage more older adults to participate in educational activities, educational practitioners need to be more aware of these variables. Chamberlain and Fetterman (1999) talked about using interactive television as a teaching tool to improve older adults' participation in learning activities, especially those who reside in rural areas.

In summary, the literature on older adults describes them as capable learners who do not suffer from age-related changes in cognitive and physical functions. With few
exceptions, all older adults are highly motivated and proactively participate in diverse educational activities.

**Programmatic responses driven by the life context of older adulthood.** What may be culled from the collection of articles on older adults and their learning is a sense of programs being driven by the life context of older adulthood. An older adult who is no longer tied to a rigid work schedule or possessing a more flexible life position may have easier access to disposable time for particular ventures and pursuits. Moreover, older adults, in general, are at a stage in their development where their attention is naturally drawn to specific learning topics over others. As such, learning programs for older adults appear to be driven by and founded on the elements descriptive of their life stage or developmental position (Roberson & Merriam, 2005). Building on Maslow’s hierarchy of needs, Feldman and Sweeney (1989) point to how education programs for older adults can address basic survival in old age, coping with life transitions, generative giving, and growing for continued personal development.

A number of articles refer to Elderhostel, a program originating in the United States whereby older adults engage in liberal arts education often on college campuses. Elderhostel is now a worldwide program that can be characterized as a learning vacation for older adults with the proper wherewithal. In respect to peer or social interactions, which are considered to be important in late life, Elderhostel is described as providing a conducive social component that enriches the total experience (Brady, 1983). The similarities of life stage and developmental factors promote a unity not readily found in other types and venues of learning programs for older adults. Curiously, Brady (1983) commented that Elderhostel attracts a certain “kind” of older person and Wacks (1989) explained that Elderhostel participants “as a rule ... are well educated, middle income, age 60 and older, highly mobile, and life-long learners” (p. 23).

With European beginnings, the University of the Third Age (U3A), which aims “to enhance the dignity of the whole generation by showing how vigorous individuals can ward off the physical and mental decline of the Fourth Age” (Morris, 1984, p. 135), operates to address issues of aging and late life well-being. This programming can be found in Great Britain, France, Australia, and New Zealand. These educational programs are based on the premises that healthfulness and lively cognition are interrelated (Swindell, 2002), and age-restricted (Shea & Tidmarsh, 1981) learning venues would be of value precisely for the commonality of developmental issues faced by persons in a particular life stage. Furthermore, U3As cost less than Elderhostel programs (Swindell, 2002), with course instruction and administration being rendered by volunteers (stemming from the British model vs. the French model, where universities and their officials are more involved). Another life stage impetus that U3As seem to meet is the benefit for older adults to reestablish their diminishing social network.

Bass (1986) charted a typology of educational options for older adults. Program types include transitioning to retirement, personal enrichment, life planning, specialized offerings related to physical or neurocognitive therapy, coping with terminal
health conditions, and career training to reenter the labor market. It is obvious which
among the list may be ventures of desire versus need, although some may be driven
by both motivations. In the literature, several programs are described as preretire-
ment education (Buchanan, 1988; Jarvis, 1980, 1983) that regards assisting aging
adults to “determine the life style they can have by maximizing the use of their
resources” (Buchanan, 1988, p. 4). Such programming overlaps the topic of life
planning. Of particular interest, Cusack and Thompson (1996) described a training
program for retired older adults rendered by peer older adults toward personal
growth in their postcareer era of life. The undercurrent of these programs adheres to
both the desire and need expressed by many older adults for ongoing educational
programming in their retirement (Hentschel & Eisen, 2002).

Wolf (1992) promoted learning for older adults through a salient resource that
many in late life uniquely have acquired—a vast reservoir of memories. Exercises of
life review and life-line sketching (Wolf, 1992) activate cognition toward calibrating
rich stories from the older adults’ past toward a better understanding of oneself,
which may facilitate personal enrichment and a more informed planning for the
remaining future. Lastly, Wacks (1989) reports of an Elderhostel program offering
titled “Life After Death” dealing with “eschatological concerns” (p. 23) that are part
and parcel of the second half of life.

In summary, the literature reviewed presents adult education programming for
older adults that seems to be based on the impetus of the life context of older adult-
hood. Greater access to disposable time and interest in particular issues associated
with this life phase and developmental position are seen to be influential factors that
shape educational programs.

**Discussion**

With few exceptions, the literature portrayed older adults as a homogeneous
group free from age-related physical and cognitive decline, enabling them to proac-
tively participate in learning opportunities. This normative description of older
adults in adult education is not surprising, as it reflects the typical profile of partici-
pants in formal adult education activities. The typical participant is middle class,
White, male or female, and the greater one’s previous education, the more likely one
is to participate (Merriam et al., 2007).

What this review has shown us is that practitioners and researchers need to pay
more attention to the diversity found in the older adult population, including the vari-
ables of race and ethnicity, education, income, and physical and cognitive impedi-
ments. For example, in 2000 to 2001 more than 20 million Hispanics (42% of the
whole Hispanic population) were engaged in formal and informal educational activ-
ities (Kim, Collins Hagedorn, Williamson, & Chapman, 2004). Of these Hispanic
participants we acknowledge that only a small percentage would be categorized as
“older,” yet we also know that because previous education is the best predictor of continued participation, we can also assume that the younger Hispanic learners will continue to participate as they age. However, we found only one article (Landerholm & Nelson, 1985) that described a training program for older Hispanics whose unique cultural background was taken into consideration. In 2000-2001, of the more than 40 million people who had less than $20,000 household income, 28% participated in adult education activities (Kim et al., 2004). Again, we can assume that only a very small percentage of low-income older adults participate in adult education; however, how to engage this segment of the population has been an ongoing concern of adult educators. Low-income older adults and those living on reduced income in retirement are invisible in this literature. For the most part, older adults are portrayed as comfortably retired and able to afford the cost of programs such as Elderhostel.

In addition, in most of the literature we reviewed, older adults were portrayed as capable and motivated learners who proactively participate in educational activities. Little attention was given to older adults for whom age-related physical and cognitive changes may have affected their learning abilities, or whose motivation to participate in educational activities may be affected by lower socioeconomic status or isolated residential status. Creighton and Hudson (2002, cited in Merriam et al., 2007) argued that “in many cases the highly educated and high status groups that have been the traditional beneficiaries of adult education remain the main beneficiaries today” (p. 59). Our review of the literature regarding older adults in adult education does little to contradict Creighton and Hudson’s observation.

We found the primary focus regarding learning in older adulthood to be on the context of formal learning. Formal learning, which is learning occurring in educational institutions (Merriam et al., 2007), comes across as the normative mode of programmatic offerings for older adults. Numerous articles were on Elderhostel (Brady, 1983; Burrow, 1985; Kinney, 1989; Wacks, 1989), U3A (Morris, 1984; Swindell, 1997, 2002), and other educational institution-affiliated programs for older adults (Bass, 1992; Buchanan, 1988; Castle & Selby, 1987; Drews, 1981; Hart & Bissland, 1993; James et al., 1996; Ryan, 1985; Wilkinson, 2001; Wilkinson & Capener, 1997).

The depiction that formal learning programs are the mainstay of learning in older adulthood is surprising as scholars recognize and point to real-world issues of older adults’ accessibility, affordability, mobility, and other restrictions to active participation in organized programming (Stokes & Pankowski, 1988; Swindell, 2002). In fact, according to the U.S. Bureau of the Census (2005b), less than 1% of adults aged 65 and older are enrolled in organized educational programs in school settings. Fortunately, among the articles reviewed, there were a few reflecting older adults’ nonformal and informal learning pursuits as well. Nonformal learning—“organized learning opportunities outside the formal educational system,” such as those found in community organizations, churches, and voluntary associations (Merriam et al., 2007, p. 30)—in older adulthood is described by Merriam and Mohamad (2000) regarding experiential learning activities of older adults in Malaysia. Kazemek and
Rigg (1983) report on poetry and writing workshops in senior citizen centers, whereas Street (1982) writes about the benefits of luncheon clubs for older adults at various communal gathering centers. Furthermore, Castle and Selby (1987) share their account of a life history course for older adults in a group home or residential setting. Cusack and Thompson (1996) also report on a leadership program offered in senior centers in the community. Such programs are examples of nonformal learning projects existing outside of educational institutions that appear to be addressing the interests of some older adults.

Informal learning, that learning which is embedded in our everyday activities, was mentioned in some of the reviewed articles. For instance, Roberson and Merriam (2005) describe their qualitative study of older adults in rural Georgia engaging in self-directed learning prompted by life transitions. Stokes and Pankowski (1988) published a piece on older adults’ incidental learning via television viewing. Furthermore, Fenimore (1997) spent time with centenarians to better understand learning activities in late late life. Various themes emerged from centenarians’ disclosures such as “learning through the media” (television, newspaper, mail, magazines, etc.), “physical activity and learning” (how walking around connects to experiences of alertness of mind and memory), and “window learning” (older adults becoming informed simply by looking out their window to gaze at environmental changes) (Fenimore, 1997). Indeed, everyday life, even mundane activities that fill the day, is inundated with learning according to many older adults’ experiences.

Certainly, this defining of adult learning and adult education in terms of formal, institutionally sponsored programs is common practice in the field, and it is no surprise that the literature on older adults reflects this orientation. However, the articles listed above do offer us a glimpse into the vast possibilities of older adults’ learning and thriving via nonformal and informal learning. By recognizing the potential for lifelong growth and development in nonformal and informal learning, practitioners could look to the older adult’s life context for ways to promote such learning.

In addition to uncovering the limitations in how older adults were portrayed as learners in the 93 articles reviewed for this study, we have several observations to make with regard to the 29 empirical research studies. Although we reviewed a mix of adult education publications and two of the journals are classified as research journals—Adult Education Quarterly and International Journal of Lifelong Education—of the 93 articles 29 were classified as empirical studies. Overall, approximately one third of the articles were research-based, but not evenly distributed across the decades. That is, in the 1980s 12 of the 44 articles were empirical, in the 1990s, 6 of the 32 were, and in the period 2000-2006, 8 of the 17 articles were empirical. It is possible that the period 2000-2009 may produce a higher proportion of empirical articles than the prior two decades.

Not surprisingly, in the 1980s the empirical studies were predominately quantitative, either surveys or self-report instruments. Of the 12 empirical articles, 11 were quantitative, or mixed quantitative with some interviews, with only 1 qualitative
study using observation (Wolf, 1986). Of the six in the 1990s, three were qualitative (Chene & Sigouin, 1995; Fenimore, 1997; Fisher, 1993), two had mixed designs (Cusack & Thompson, 1996; James et al., 1996), and one used a questionnaire (Walker, 1998). Finally, of the eight articles from 2000-2006, four were qualitative, two were quantitative, and two were mixed methods. This pattern clearly reflects the emergence of qualitative methods in the 1990s as a viable research design.

Perhaps because of the relative ease of access to older adults in formal educational programs, the majority of research related to learning is in formal settings, with few studies about older adult learning in nonformal and informal settings. Furthermore, there is very little diversity among the older adults in these studies. Certainly, we could learn much more about older adult learners with more attention to ethnicity and cultural issues, age, gender, sexual orientation, community-dwelling versus institutionalized older adults, and so on. Furthermore, the learning interests and needs of this population might be studied in more depth and in terms of some of the diversity variables just mentioned. We were surprised, for example, that only one article (Wacks, 1989) described a course dealing with end-of-life and afterlife beliefs and issues. As Wacks (1989) noted, “a major developmental task of the later years is going unaddressed by current educational programming” (p. 23). Eighteen years later, this still seems to be the case.

Finally, whether the articles were empirical or descriptive, we found only 1 among the 93 that applied a critical lens to the issues inherent in writing about older adult learners and adult education. Glendenning (2001) reflected on the assumptions underlying the concept of “education for older adults,” and the terms “third age,” and “educational gerontology” in order to “move towards a refinement of theory in lifelong learning which is inclusive of learning in later life” (p. 69). From a critical perspective we might also ask whose interests are being served by the current state of programming and participation in older adult learning activities.

In conclusion, we find that the literature on older adults in adult education journals over the last 26 years lags behind what we know about older adults, their diversity, their cognitive and physical capacities, and their developmental needs and interests. It is hoped that this review will stimulate more attention to these factors by both practitioners and researchers in future writing and research on older adult learners.

References


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