European Journal for Research on the Education and Learning of Adults, Vol.10, No.3, 2019, pp.207-213

Editorial: Active ageing, social inclusion and wellbeing: Benefits of learning in later life

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The education of older adults has been considered the fastest growing branch of adult education in post-industrial countries and one of the most crucial challenges facing current adult European education (Formosa, 2000). Early research on the learning preferences, motivations and trends of older persons – as well as the impact of learning on the quality of life of older learners – can be traced to the 1950s (Havighurst, 1953), even before the field of educational gerontology was formally established in the 1975 by David Peterson (1976). In recent years, an unprecedented level of influence of the concept of lifelong learning on policies on active ageing have led to a 'renaissance' moment in the practice and research of older adult learning (Glendenning 1992; Findsen & Formosa, 2016). Whilst at the turn of the millennium, one found only a handful of book publications in the field of older adult learning, and the few published articles were often in specialised and off the radar journals, in a space of less than two decades the situation is markedly different. Nowadays, as societies are experiencing, or anticipating, unprecedented number of older persons, the field of late-life learning is firmly established in both adult education and gerontology graduate programmes, as well as mainstream adult education and gerontology journals. Indeed, the field of older adult learning boasts an exciting and innovative field of practice, led by experts who group themselves under the mantles of adult educators, educational gerontologists, geragogists or gerontagogists (Kern, 2014). Learning in later life has entrenched itself as an integral part of adult education research, focusing on the diverse provision of late-life learning, the motivations and interests of older learners; wide-participation and emancipatory policies for older adult learning; and the benefits of learning for learners, providers, and society in general.

Whilst this is certainly a cause for celebration, the present scenario is not without its fair share of challenges. Indeed, very few educational theories include considerations on learning in later life by taking in older learners' interests and needs, despite the fact that the past three decades witnessed a burgeoning number of older adults enrolling in formal and non-formal adult learning programmes. Whilst one can never overstate that further longitudinal studies are required to measure the real impact of learning on the

ISSN 2000-7426

DOI 10.3384/rela.2000-7426.relae19
www.rela.ep.liu.se

wellbeing and quality of life of older persons, the emergent evidence of positive effects of late-life learning on participants' physical, psychological, and social wellbeing is surely compelling and encouraging (Formosa, 2019). Indeed, participation in learning has been found to enable residents in care homes to learn new skills (e.g. painting), keep the body active (e.g. knitting), learn about current affairs (e.g. discussion of news), keep an active mind (e.g. reading clubs), stimulating the process of affective learning (e.g. arts-based learning), and engage in transformative reminiscence (e.g. films, biography, stories) (Sabeti, 2017).

This interface between older adult learning on one hand, and impact on wellbeing and active ageing on the other, is precisely the focus of the specific theme chosen for this thematic issue of RELA. Such a focus constitutes a continuation of the international research on the wider benefits of learning trusted by Bynner, Schuller, and Feinstein (2003), and colleagues at the Center for Research on Wider Benefits of Learning as the work of John Field (2009). A more recent European research project also picked up this research focus (Manninen, 2012), asking for the outcomes of adult learning and adult education. This focus is urgently warranted because emergent large-scale data has been limited solely to middle-aged adults. Thus, little is known about effects of learning in later life on benefits ranging from human capital, social capital to identity capital grouped different forms of benefits (Bynner et al., 2003). It also remains unclear if such dimensions are the most relevant for older adults and if there are other kinds of outcomes that have to be taken into account when investigating benefits of learning in retirement. As this focus on forms of capital, distinctively promoted by the OECD (2007), has been criticised for its neo-liberal standpoints, there is no doubt that other dimensions of social and personal benefits, especially their impacts on existing social inequalities, require urgent attention and deliberation.

The studies mentioned above share a common ground whereby they focus on benefits that are measurable by standardised instruments, with the result that other forms of, non-quantifiable, educational outcomes are running the risk of being left out in the cold. Educational theories underline among other benefits of education on individual development (Mezirow, 2000), the changing relation of the individual to the world and itself (Koller, 2011), as well as the possibilities to transform the social milieu by bringing advances not only in a materialistic sense but also in psycho-social (habitus) spheres (Bourdieu, 2004; Eribon, 2009). These latter studies - which tend to hold a qualitative, narrative, and autobiographical approach - are highly equipped to inform us as how educational benefits occur as well as how they are interrelated with the social environment since, after all, educational outcomes are not only dependent on the *ethos* of particular learning programmes but are also hinged on the surrounding institutional contexts. Nevertheless, despite the fact that these studies all point to a broad spectrum of benefits for learners and societies as an outcome of adult education, they neglect to differentiate between different phases of adulthood. Whilst one may assume that the outcomes of learning found in these research projects are similar to those experienced in later life, so far there is no clear evidence that this is the case. Indeed, the question of interdependencies between educational activities, the social environment, and learning benefits in later life remains relatively unexplored to-date.

This RELA thematic issue directs attention to the possible learning outcomes which become more or less relevant in later life, and may range from an active lifestyle (Brustio et al., 2018; Ross et al., 2018), wellbeing (Langlois et al., 2013) and social inclusion (González-Palau et al., 2014). Therefore, this thematic issue demands academic attention on effects of education and learning in later life on social, psychological and health-related dimensions. However, a central focus is commanded on the notion of active ageing

as a vehicle to foster healthy ageing (Paúl, Ribeiro & Teixeira, 2012) and to strengthen the impact of older adults in ageing societies (Chen & Gao, 2013). Following a range of empirical research, it can be assumed that being active keeps older people healthy, autonomous, and socially included (Mestheneos & Withnall, 2016; Lido et al., 2016), whilst also strengthening the productivity and living standard in a society in times of demographic change (Henkens & Schippers, 2012). However, active ageing is not immune to criticism, as it puts pressure on the older adults to engage in different fields, whilst ignoring the obstacles that some elders may experience in participating in a broad range of activities due to social disadvantages (Ranzijn, 2015).

Social inclusion is, of course, necessary for wellbeing throughout all stages of life (Deci & Ryan, 2008), and a prerequisite for democratic societies (Martin, 2000). Older adults can be perceived as a vulnerable group and at high risk of social exclusion as they are exit the labour market. Gainful work remains a key driver for social inclusion in post-industrial societies, especially in the face of an empty nest, as elders' children leave the nuclear family, and as a growing number of friends, relatives and acquaintances pass away as they reach the latter parts of the life course. In the same way, the digitalisation of many areas of daily living increases the risk of social exclusion of older adults, who are - on average - not as digitally literate and competent as younger peers (Schmidt-Hertha & Strobel-Duemer, 2014). In this respect, more attention could be given to contributions of older adult learning towards active ageing, social inclusion, and wellbeing in later life.

The World Health Organization (2012, p. 9) proposed a definition of well-being that considers a subjective and an objective dimension, in that well-being "comprises the individual's life experience as well as a comparison of life circumstances with social norms and values". In recent years, there was a growing concern on that interface between quality of life and wellbeing on one hand (e.g. DeNeve et al., 2013), and the ageing transition on the other. A significant research emphasis was spent in determining which factors are most influential in propelling older persons to higher levels of physical, psychological, and social wellbeing. This led to the development of measurement scales that measure subjective and objective well-being in the hope of uncovering the key determinants of active, successful and positive ageing such as the Satisfaction with Life Scale (SWLS) (Diener et al., 1985) and the Positive and Negative Affect Schedule (PANAS) (Watson, Clark, & Tellegen, 1988), and the World Health Organization Quality of Life (WHOQOL) (Power et al., 2005) to mention a few. Whilst there is no doubt that measuring subjective and objective well-being can assist us in taking a comparative snapshot of ageing, nevertheless the reliable and valid combination of qualitative and quantitative data is not without its challenges. It is tricky to measure and gauge the extent that social exclusion and inequalities, relations and social life, as well as events and transitions, impact on different older persons with diverse levels of personal resilience and social capital, and living in dissimilar geographical regions which may include positive or negative community environments. Yet, the emerging evidence that older people may be becoming decreasingly satisfied, lonelier and more depressed, and living with low levels of wellbeing (Steptoe, Deatus & Stone, 2015), can no longer be swept under the carpet, and rather, should be researched as best one could.

One trustworthy way to protect against a deterioration in wellbeing in later life is through engagement in social events, but especially, learning activities. As per RELA's interest focus, the study of well-being and quality of life should definitely be linked with education and learning processes. Indeed, despite the fact that both wellbeing and quality of life has both been awarded increasing attention in recent years (e.g. Merriam & Kee, 2014; Jenkins & Mostafa, 2015; Mestheneos & Withnall, 2016; Narushima, Liu, & Diestelkamp, 2018), the questions surrounding the real benefits of older adult learning

for older learners are far from settled, and no consensus has yet been achieved on this area as far as policy, research and action are concerned. As Field (2009) stated, the implications are immense:

> A focus on well-being presents significant challenges to public policy, to providers, and to learners themselves. It suggests the following: The evidence that learning promotes well-being is overwhelming. This has huge implications in a society that is experiencing unprecedented levels of stress, mental illness and anxiety about the future – combined with the adoption of public policies that require individuals to take responsibility for planning against future risk. Learning providers must make much more of their contribution to well-being, as well as promoting the well-being of their own staff. (Field, 2009, p. 5).

This thematic issue on active ageing, social inclusion and wellbeing includes six articles from scholars across Europe. The first paper is titled 'Inclusion in education later in life: Why older adults engage in education activities?'. In it, Cecilia Bjursell questions the motives why older adults choose to engage in education activities. The article combines the results from two previous empirical studies among Swedish pensioners. Although the dominant arguments can be found in both studies (staying active and socialising), it seems to be a fusion of extrinsic and intrinsic motivation. A closer reading of the narratives reveals that many participants enrolled in Senior University because other family members, friends, and former work-colleagues had enrolled. This suggests that what on the surface may appear as an individual's choice could, in fact, be explained by social factors.

In 'The role of empowerment and agency in the lives of older men living alone', Miranda Leontowitsch, Insa Fooken and Frank Oswald report on a study aiming to understand closely this group – men living alone at later life. The study used interviews with stakeholders and biographical interviews with older men living alone in Frankfurt/Main. On the one hand, the article shows that service providers used an approach inspired by empowerment and active ageing strategies. On the other hand, the biographical data shows that living alone was a learning process and involved the ability for men to care for themselves as well as others. Learning to live alone enabled them to maintain an identity as an independent individual.

Rute Ricardo and Andrea Porcarelli authored 'Education and socialisation in later life: The case of a University of Third Age in Portugal', and used documentary analysis, naturalistic observation, and semi-structured interviews to make an exploratory case studies, which revealed the University of Third Age to be a non-formal learning space in which older adults engage in educative practices and socialisation. In some cases, older adults had the opportunity to participate in new activities. Socialising spaces are key to build new social networks and maintained the pre-existing ones. Such networks help to counteract older adults' isolation and loneliness. The study revealed important clues regarding the relationships between the individuals' education, socialisation and wellbeing.

The fourth paper of this thematic issue, titled 'Should age-specific knowledge about older learners be shared with teenaged tutors as part of their preparation for intergenerational learning?', by Tiina Tambaum focused on teenagers acting as non-professional tutors, which are able to build digital skills with older adults in intergenerational programmes. Tambaum analyses the connections between geragogical principles and the nature of scaffolding assistance. It proposed a focus on tutors' scaffolding skills instead of older learners' peculiarities when preparing teenaged tutors. The theoretically grounded idea provides a point of origin for future empirical studies.

Carla Vilhena, Sandra T. Valadas and António Fragoso used the data from the European project Old Guys in 'Education matters: cumulative advantages and disadvantages amongst Portuguese older men' to analyse the influence of the educational background over various dimensions of the lives of older men aged 60-plus across the life course. Drawing on the theory of cumulative advantages and disadvantages the authors used biographical research to understand deeply the lives of men with a very low educational background and men with a medium/high educational background. The results show the influence of educational background in the life course, and how it can contribute to accumulation of advantages/disadvantages that explain their biographies and the very different situations in which they live today.

Finally, in 'The potential of statistical matching for the analysis of benefits of learning in later life' Maja Wiest, Tanja Kutscher, Janek Willeke, Julie Merkel, Madlain Hoffmann, Katrin Kaufmann-Kuchta and Sarah Widany show the potentialities of statistical matching (The potential of statistical matching for the analysis of wider benefits of learning in later life). Statistical matching opens the possibility to exploit the existing data by combining data sources with complementary features based on shared information. The article describes the matching of two data sources (German Ageing Survey and Study of Educational Attainment and Interests of Older People) with the aim to analyse the effects of educational participation on well-being in later life. Based on matched data, the effects of educational activities on life satisfaction are examined. The discussion focuses on future demands on data and methods for investigating wider benefits of adult learning in quantitative research.

All papers together point to the heterogeneity of ageing with respect to gender, economic status, culture, and education. They make visible which kinds of educational benefits can be found in later life and what their relevance is for the individual as well as the society. Looking at the impact of education on active ageing, social inclusion, and wellbeing in later life, it is incomprehensible that big international comparing studies on education and learning of adults (such as the Adult Education Survey or PIAAC) exclude adults older than 65. At the same time, we can see the potentials of qualitative or small-scale studies to shed more light on the complex interaction of education, learning, social inclusion and wellbeing in individual biographies and to understand the needs of specific groups of older adults. For future both kinds of research are needed as well as further development of theories on education and ageing, also to inform older adults, adult education providers and policy makers about the potentials and benefits of learning in later life.

The thematic issue also includes an open paper titled 'Measurement of media pedagogical competences of adult educators' authored by Matthias Rohs, Bernhard Schmidt-Hertha, Karin Julia Rott, and Ricarda Bolten. Arguing that media pedagogical competence is critical for the modern-day adult educator, the authors demonstrate that in the process of adult learning both the use of digital media in the classroom and the transfer of knowledge in dealing with media are the basis for social participation and individual development. On the basis that sparse research has been conducted that assess media pedagogical competence of adult educators, the authors designed and piloted an instrument for objectively measuring media pedagogical competence with adult educators (n=622), so that the paper provides the first results concerning objective measurement of adult educator media pedagogical competence.

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