

World  
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University of St.Gallen

# The WDA – HSG Letters

*on Demographic Issues*

## The Role of Lifelong Learning in Successful Ageing

*by Marie F. Smith*

*No. 2008/2*



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# The Role of Lifelong Learning in Successful Ageing<sup>1</sup>

**Marie F. Smith<sup>2</sup>**

In his play "As You Like It," Shakespeare delineated seven ages of man: the infant, the schoolboy, the lover, the soldier, the justice, the withered and declining old man and, lastly, the man so decrepit he is once again a child – "sans teeth, sans eyes, sans taste, sans everything." This speech – with its famous opening line, "All the world's a stage" – has been memorized by countless generations of high school students in the 400 years since it was written. For all of those centuries, it has struck a chord not only with the beauty of its language but because these seven life stages seem so true – we recognize them in our own lives and in the lives of others.

Ladies and gentlemen, today I am here to tell you that Shakespeare's seven ages of man no longer adequately describe the life of the typical individual in the educated, industrialized world. Setting aside their explicit gender bias, Shakespeare's seven ages simply no longer ring true, especially for the latter part of life.

In Shakespeare's formulation, the "justice" stage, "full of wise saws and modern instances," was the pinnacle of life's arc, followed by decline and dementia. Now, and for the past 40 years or so, an increasing number of Americans – and I suspect others in the industrialized world – are

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experiencing and enjoying an entirely new stage of life, commencing around retirement from full-time employment and ending, because of declining health, when they can no longer reliably take care of themselves. For the fortunate, this life stage can last for 20 or more years.

Yet why did this new stage of life emerge? Who are the people experiencing this stage, and what role does learning play in it? Why is the emergence of this new life stage important? What can we learn from those who are getting the most out of this stage, and how can we harness their experience and wisdom for the good of our communities and the world?

A retirement of leisure and cultivation has long been possible for an elite few with both the means and good health. In much of the developed world, however, the coming of the industrial age degraded the aging experience for the masses. Indeed, in 1906, one economist wrote that “the old man today, slow, hesitating, frequently half-blind and deaf, is sadly misplaced amidst the death dealing machinery of a modern factory.” One hundred years ago, retired workers typically faced a few years of sickly dependence on family, followed by death.

Slowly, over the twentieth century, the phenomenon of retirement as we know it today took shape. Advances in wealth and health and changes in the nature of work all played their part. First, the Great Depression hit older people especially hard in the United States and led to the Social Security Act of 1935. After World War Two, pensions expanded rapidly in America when unions wielding a stick demanded them, and the government held out the carrot of tax benefits to corporations willing to offer them. Older people became a political interest group whose highest point of political influence in

the United States was probably after the 1972 presidential election when social security benefits rose by 20 percent and future benefits became tied automatically to increases in the cost of living.

Health in old age also improved dramatically throughout the twentieth century as better sanitation and breakthroughs in medical technology – such as the discovery and wide distribution of antibiotics – led to increased life expectancy. Whereas records for life expectancy at 65 do not go back to 1900, we do know that in 1950 the average 65-year-old American could expect to live another 13.9 years. By 2004, that measure had increased to 18.7 additional years. It is no wonder that the U.S. government's interest in tracking this statistic coincided with the growth of social security and the private pension system: both government and business, for the first time, had a financial interest in knowing how long people would live after "normal" retirement age.

Together with the advances in wealth and health came a fundamental change in the nature of work. In the last 100 years, America has evolved from an industrial economy to one in which an increasing amount of work is knowledge based. Such a knowledge-based economy requires an educated workforce. Yet, in 1940, only 4.6 percent of Americans 25 years or older had graduated from college. Following World War Two, however, the GI Bill of Rights provided the financial support that boosted 1.2 million veterans into the ranks of the college educated, and by 2006, 28.0 percent of Americans 25 years or older had graduated from college.

One other deeply important change occurred in the work *experience*: whereas industrial labor can be physically degrading and alienating,

knowledge-based work is often stimulating and, being frequently a group effort, can also be socially rewarding.

By the mid-1970s, this new breed of retirees – “healthy, middle-class, if not wealthy, and wise” to paraphrase Ben Franklin’s Poor Richard – was wading onto the beach of retirement in record numbers. Perceptions of older people, however, were mired in stale images that owed more to Shakespeare than to present reality. In 1970, American social activist Maggie Kuhn founded the Gray Panthers, in part to confront the image that older people were frail and useless. Songs like the Beatles’ “When I’m Sixty-Four” or Simon and Garfunkel’s “Old Friends/Bookends,” with its “How terribly strange to be seventy,” reflected then prevailing attitudes that older people were either quaint and slightly comical or grouchy and opinionated.

In 1975, Elderhostel was founded and – given the economic and social context described above – it is not surprising that participation grew rapidly, from a modest 200 that first year to nearly a quarter of a million 20 years later. However, even though the new breed of retirees were healthy, well-off, and wise, attitudes about old age had not changed and, as a result, only a few pioneers – like Elderhostel founders Marty Knowlton and David Bianco – imagined that “learning in retirement” might be something that anyone wanted.

Thirty-two years on – and, for Elderhostel, 4 million students later

– terms like “learning in retirement” and “lifelong learning” have all but replaced centuries of dubious folk wisdom along the lines of “You can’t

teach an old dog new tricks.” It is a great time to be a healthy, financially secure, and wise older American. The “evergreening” of old age is in full flower.

Yet, who exactly are these people? How big is this group? What role does learning play in this new stage of life?

Last year, Elderhostel embarked on a program of research – including focus groups, quantitative surveys, and in-depth interviews – to begin answering these questions. The principal survey yielded more than 1,200 responses from a representative cross-section of the American population aged 55 years and older. This survey asked nearly 300 questions about lifelong learning and other leisure activities, demographics, and self-reported measures of psychological well-being and physical health. Using clustering techniques, the respondents were split into five segments. Two of these segments – labeled Focused Mental Achievers and Contented Recreational Learners – together appear to comprise the population that is experiencing and enjoying this new evergreen stage of life.

Specifically, these two segments make up 47 percent of the 55+ population, which in America numbers 66 million, meaning that 31 million belong to this group. That is an enormous number – one American in ten, or approximately the population of Canada. Therefore, a life stage once available only to a narrow economic and social elite is now a mass phenomenon.

This population is also educated – 36 percent have graduated from college or

have higher degrees – and financially, they are very comfortable, with mean household incomes of 55,000 dollars. More than half reported their health to be either “very good” or “excellent.”

Understanding *who* these individuals are is important, but knowing what they do with their lives is where the real insights lie. Most particularly, the lives they lead are vital, active, and *involved*. For example, 14 percent of the group labeled Focused Mental Achievers, who comprise 13 percent of the 55+ population, are studying a foreign language – that is 1.2 million older adult foreign language learners. Thirty percent attend a class or lecture once or more a month, while 10 percent belong to book clubs. The population as a whole loves to travel.

These individuals are also involved in their communities. More than 30 percent volunteer, and many are in leadership positions in community organizations. Twenty percent choose to volunteer in a teaching role as coaches, mentors, or literacy instructors.

The second group, the Contented Recreational Learners, has a similar profile, although with somewhat lower levels of involvement across all activities. However, based on standard psychological measures of optimism and perceptions of control over one’s life, both groups are remarkably content. By anyone’s definition, both Focused Mental Achievers and Contented Recreational Learners epitomize “successful aging.”

Following the national survey, Elderhostel used the same questions in a survey of its program participants. Whereas 47 percent of the national panel



fell into the two evergreen segments, *85 percent of Elderhostel participants qualified as either Focused Mental Achievers or Contented Recreational Learners.*

While this figure did not surprise us – we have observed Elderhostel participants as pioneers of this new life stage over several decades – knowing it gave us an opportunity to dig even deeper into the psyche of the evergreen nation. We invited long-time Elderhostel participants to describe their daily patterns and pursuits in greater detail, and received almost 700 thoughtful essays in return. A few of these voices are excerpted below:

Now that I have more time and energy as a retired person, I am returning to my former love of research work and combining music with the history of other arts. I have chosen the work of the composer and musician Thomas Morley and am now researching the arts, architecture, and ambiance of his time and place in history. Putting his music together with the luster of the late Elizabethan court enriches me and keeps me mentally busy and delighted. In another direction, I have time now to return to the study of Chinese language and literature, focusing on poetry. These were my college passions, and there is nothing more rewarding than to return to those things we loved in our earlier years. [Project photo with female voice over]

Since I retired as a church pastor, I have been involved in two special activities in addition to Elderhostel trips. For over ten years, I have been a volunteer interpreter at the Oregon Coast Aquarium. In addition to an eight week initial training, we have periodic enrichments on topics related to the ocean. I find the ocean is a vast area of knowledge, and I learn something new almost every week. My second area of interest and involvement is

singing in a barbershop chorus and quartet, which I have also been doing for over ten years. I am secretary of our chorus. [Male voice]

About 1998 there appeared a service project listed at the Eisenhower Farm in Gettysburg, Pennsylvania, in the Elderhostel directory. Feeling that I needed to return something in the way of labor to the memory of an American President I admired, I signed up to drive to Gettysburg. During that week, a very congenial group restored and painted cattle fences in the pastures surrounding the Eisenhower Farm. After the program, I wrote to the National Park Service and asked to join a volunteer force under their supervision. They have energetically welcomed me when I choose to make the 800-mile drive from Atlanta to Gettysburg. I weed Mamie's 400 rose bushes and care for the walks surrounding the house. In the heat of August afternoons, tour groups dismount from buses and stop to question why an old grey-haired man is working, in solitude, on the farm shrubbery and feeling humbled in the labor he considers important. I feel that my volunteer labor gives me complete fulfillment. Most consider me a fool. But a few understand my deep feelings when I see on the Eisenhower Farm the same flag I served under in Korea. [Male voice]

I'm a snare drummer in two bands: Heavy Shtetl, an amateur Klezmer group, and New Horizons, a senior citizen concert band. The band meets for two hours twice weekly. This activity fulfills an aborted ambition. When I entered the University of Wisconsin as a freshman in 1952, the band director announced, in God-like tones, "No girls in the marching band!" [Female voice]

I would enjoy telling you about my activities, especially those that keep my

mind sharp. I am 82 years old-young; does it matter? I read voraciously: histories, biographies, humor, novels, and occasionally Japanese Manga. My favorite volunteer activity is being a tour guide for San Diego's public radio and television station, which enables me to meet diverse people, including foreigners, Boy Scouts, students, seniors, military personnel. I have been doing this for over 30 years and have learned so much about communication technology, especially the satellite connection. [Female voice]

Hopefully, you need no more convincing that this evergreen group of Americans is a huge, vital, productive, and important segment of society. So, you might ask, why should we care?

The simplest reason is that membership in this life stage, already enormous, is only going to increase. In America alone, there are now 35 million people over the age of 65, but the U.S. Census Bureau predicts that this number will grow to 54 million by 2020 and to 86 million by 2050. As the population in America and other industrialized nations becomes increasingly dominated by older people, the evergreen segment of society may become the most influential social segment of all.

Many view this as a problem, saying that this demographic bulge – driven by high birthrates 60 years ago in the United States and low birth rates now in many other developed nations – will become first an entitled and then a dependent generation destined to suck the lifeblood out of their respective economies. Such economic concerns cannot be ignored; they are real. Therefore, even though nobody, I think, would question that older people deserve to enjoy the leisure they have earned, for the long term health of

society, we must entice this group to remain productive. I think it is clear that they have plenty to offer.

Most particularly, the notion that 65 constitutes normal retirement age is an outdated legacy of the industrial age when it was believed that older people were a danger to themselves and others on the factory floor. This conventional wisdom has outlived its usefulness and must be discarded. Business needs to adapt its mindset and make older people a standard part of their employee base.

Nonprofit organizations, especially, need to draw on the talents and energy of the evergreens. Awards like the Civic Ventures' Purpose Prize are drawing useful attention to how older people are bringing creativity and an entrepreneurial spirit to volunteer efforts. As you heard in the voices of the Elderhostel participants, people in this new stage of life are eager to teach and mentor, not only for the benefit to the recipients but for what they themselves gain by remaining socially and cognitively engaged.

This last point deserves some elaboration. Our research showed a high correlation between participation in cognitively enriching activities – especially those that also provide physical activity and social engagement – and successful aging. At the same time, a recent survey by the MetLife foundation found that leading-edge baby boomers fear Alzheimer's disease – sans names, sans car keys, sans mind, sans everything – more than any other illness associated with aging. Therefore, even though large public prizes are useful, in order to mobilize tens and hundreds of thousands, we must also create incentives that promote volunteerism as an aid to building "cognitive reserves" during aging. It's a marketing "hook" that should snare

many new volunteers.

In traditional cultures, the wisdom of the oldest members of the tribe or clan was valued and revered. Older people had outlived most of their peers and were the only living link to the past. Having seen much in their long lives, they had a precious thing called wisdom – “the combination of experience and knowledge with the ability to apply them judiciously” – a devalued commodity in short supply these days.

Ladies and gentlemen, more than anything else wisdom needs to mount a strong comeback as a social value. The perception of older people as cranky geezers who are burdens on society is diminishing as the numbers of hale and hearty evergreens swell. However, in some quarters, this perception has been replaced by a view of active older people as busy but self-centered “grannies on the go.” Restoring wisdom to its rightful place will not only help change this perception, it will also spur older people to unlock their own talents, give back to society, and leave the legacy – be it only helping one child learn to read – that we all, in our hearts, desire to leave.

A new cohort of active and educated older adults, unlike any other in human history, is at large in the world. Numbering more than 30 million in the United States alone, it may be as large as 75 million by mid-century and two to three times that size if counterparts in other developed nations are included. These adults are dedicated to leisure but also to personal growth through learning and community service. Therefore, let us all work together to ensure that their skills, experience, and wisdom become a resource for solving problems in our communities, our nations, and our world.

The German philosopher Georg Hegel famously wrote of Minerva, the Roman goddess of wisdom whose constant companion and symbol was an owl, that “the owl of Minerva spreads its wings only with the falling of the dusk.” Whereas this much-discussed passage has many interpretations, my own perception is that truth is best seen in shades of grey rather than in the glare of the day or the darkness of night. But why dusk and not dawn? I believe Hegel was saying that wisdom comes by necessity toward the end of a day rich with learning, events, and experiences.

So it is with human lives, and men and women have long known it to be true; living one’s life fully – learning and growing intellectually, engaging socially within a community of loving family and friends, remaining physically active – are the keys to a healthy and productive older age. In today’s societies, wisdom is not rare, but the behaviors that keep life rich with promise are not as broadly pursued as they must be. Millions of people in developed societies will attain the evergreen stage of life; it is our responsibility to ensure that they learn how to make this stage of life as productive as possible, both for the health of the individual and for the health of our aging societies.

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