In this article I examine a range of explanations for the patterns of educational participation by older people in New Zealand. These include explanations that focus on the impact of historical changes, the physiological processes of aging, the labor market, institutionalized ageism, and the structures of capital. A number of practical implications for policy and program development are identified, and I conclude with a discussion of three theoretical perspectives and their implication for the development of policies for the education of older people.

In the previous article (Tobias, 1991), I presented a wide range of findings on the participation of older people in educational activities in New Zealand, which derived from survey research undertaken in the 1970s. In the conclusion of that article, I raised a number of questions and suggested that explanations and interpretations of the findings were problematic. How, for example, does one explain the lower rates of educational participation among older people? How does one explain the finding that, whereas 1 in 3 respondents 65 years and older expressed an interest in participation, only 1 in 18 had in fact participated during the previous year? I noted that there are no easy answers to these questions, and argued that different theoretical perspectives suggest different kinds of explanations and stress different sets of factors. One purpose of this article is to identify the variety of factors and to examine a range of theoretical perspectives. A second purpose is to examine some of the implications for policy and program development.

THE SEARCH FOR EXPLANATIONS

The Impact of Historical Changes

One set of factors that may partially account for the differences in the patterns of participation and interest of younger and older adults arises out of the historical changes in the field of education in New Zealand over the past 50 to 60 years. These have resulted, among other things, in a significantly larger percentage of younger adults receiving a longer period of initial education and obtaining higher levels of educational qualifications than their elders. Thus, in the New Zealand survey, whereas 85.3% of respondents under 65 years had proceeded beyond a primary or Form 2 level of education, only 36.5% of those 65 and older had proceeded beyond this level. A large number of studies have demonstrated a high positive correlation between levels of initial education and educational participation during adulthood. In view of this, it may be argued that differences in rates of participation and interest between younger and older adults may be partially explained by the differences in the early educational opportunities available to successive population cohorts, as well as differences in the level of provision of secondary and continuing education.

The Impact of the Labor Market

A second set of factors that may partially account for the differences are those associated with the labor market. It may be argued that the pressures and incentives to obtain credentials and marketable skills, which derive directly from the labor market, have a major, direct impact on the educational participation of those involved in or who wish to enter the labor market, whereas the labor market has no direct impact on those who are not part of the paid labor...
force, including retired people. This would explain, at least in part, the differences in educational participation rates between younger and older adults. In the New Zealand survey, nearly half (47.3%) of all participants were involved in vocational education. Because older people, most of whom were retired, were not involved in vocational education, it could be argued that the overall participation rate of 5.5% for older people should be compared with the rate of 15.5% participation in "nonvocational" and general education for the sample as a whole rather than with the rate of 29.5%.

The Impact of Aging Processes

A third set of factors that may partially account for the differences are those associated with the physiological processes of aging: higher levels of ill health and a lowering of energy levels. Support is given to this hypothesis by the finding that a significantly greater percentage of older than younger respondents gave these types of reasons for their nonparticipation. Two other kinds of reasons, namely those associated with transport difficulties and with the perception that they were too old to study, both of which were also given significantly more frequently by older than by younger respondents, may also be interpreted as lending support to this hypothesis.

The Impact of Institutionalized Ageism

Although all the reasons referred to previously here may be interpreted in part as reflecting the effects of aging processes, they may also be seen as reflecting a fourth set of factors: those arising out of the structures and practices of institutionalized ageism. These factors are pervasive and have been widely documented in recent years (Aging and Education Working Party, 1987; Irwin, 1988; Kendrick, 1988; Koopman-Boyden, 1988; Phillipson, 1982; Schofield, 1986; and Social Advisory Council, 1984). There is evidence that a large number of policies, mechanisms, and practices serve to create increasing dependency among older people rather than maintaining and fostering independence. Events, actions, and problems that have their origins in the social structure (e.g., poverty, loneliness, and lack of social recognition and status) are redefined as medical problems. There are many overt and covert age-graded barriers to employment, training, and promotion. An arbitrary age of 60 or 65 years is still used by the state and by most other employers as the age for compulsory retirement, and chronological age may still be used legally as a criterion in the appointment of people to jobs and in their selection for training programs. There are also the no less important effects of selective socialization. From an early age, people learn to accept the dominant myths and definitions of what constitute the legitimate expectations, roles, and activities of older people and also to devalue many of the contributions and potential contributions of older people. Young people learn to perceive old age as a "problem," and older people learn to accept this definition of themselves. The role of learner in certain private or personal spheres of human life is increasingly acceptable. Attendance at craft and hobby courses may find its justification and legitimation in terms of occupational therapy or as an activity that will keep older people occupied or happy. The role of teacher-of adults or of children-is less acceptable. For example, it is not seen as legitimate for a person over the age of 45, however experienced and skilled she or he may be in working with children, to receive formal training as a primary teacher, and older people are seldom employed as tutors of adults. The myths affect many aspects of life and relate to the creativity and sexuality of older people, as well as their capacity to learn and undertake meaningful work. For all these reasons, it may be argued, the educational curriculum becomes increasingly narrowed as one gets older; the options for learning are effectively reduced by formal and informal mechanisms.

The Impact of Capitalism

This, then, is one set of arguments that suggests structural explanations for the patterns of
participation and interest in participation by older people. There is, however, another set of arguments that needs to be taken into account. Much of the research on participation by adults in education has assumed that such participation is necessarily functional both for the individuals concerned and for society as a whole. An exception to this is the work of Chris Phillipson and Patricia Strang (1983) on pre-retirement education. In point of fact, the curriculum of adult education-no less than that of initial schooling may be seen as problematic (see Battersby, 1985) as a product of class struggle. Thus, although the extension of educational and training opportunities to more working-class people including older people may improve the quality of life of many of those who participate, this same process may serve to produce and reproduce the exploitative relations necessary to the survival of capitalism under conditions of rapid change.

The processes of recruitment and selection for continuing education and training programs and the processes of certification incorporate mechanisms that divide the working class. They operate as instruments for the lifelong selection, manipulation, and control of the labor force. In addition, it may be argued, the curricula themselves are generally focused on the acquisition of narrowly proscribed skills or the development of a deeper level of knowledge and skills within a highly specialized area of application or the development of a set of attitudes that in no way threatens the structures of capitalism. This is the case not only in job-related education and training, but also in other fields such as education for personal development and leisure. Most educational programs reinforce a wide range of "commonsense" yet frequently contradictory beliefs; few seek to question or challenge these beliefs and the bourgeois hegemony that they represent; and many, it may be argued, serve to channel the energies of people into "safe" areas of learning.

If it is accepted that there is validity in these arguments, it follows that the relatively low level of interest and participation among older people and other groups within the working class may reflect the effects of policies and practices that exclude substantial sections of the working class from important forms of education, suppress the creative, critical, and reflective capacities of these people, and result in the rejection by many of those educational opportunities that are available. It may be argued that under conditions of advanced capitalism, the majority of New Zealanders are not encouraged to develop interests that may be pursued during adulthood and more especially during their later years. For many retirement and old age are burdens rather than a period of freedom to pursue lifelong interests or develop new ones on the basis of a lifetime of exploration, learning, and inquiry. The fact that nearly 70% of those 65 and older expressed no desire to engage in any formal learning and only 5.5% of those over 65 had participated in any form of education in the previous year may be seen as indicative of a political economy that distorts human growth in the interests of capital accumulation.

Implications for Policy

Recommendations for policy development do not for the most part arise directly from the data presented in my previous article (Tobias, 1991). As suggested in the previous discussion, the data are subject to a variety of interpretations, and policy recommendations hinge on the theoretical framework adopted. Nevertheless, it is possible to draw from the study some general implications for policy and program development.

The study suggests that there is a considerable potential demand for education among older people, especially in such areas as sewing, crocheting, knitting, cooking, pottery, bookbinding, candle making, cane work, carving, ceramics, floral art, jewelry making, leather work, linocuts, woodcuts, model and miniature making, picture framing, shell work, wood turning, basketry, furniture restoring, boat building, electronics, ham and amateur radio, metalwork, woodwork, cabinet making, optics, telescopes, restoring and maintaining engines and cars, embroidery, macramé, rug making, soft-toy making, spinning, tapestry, weaving, painting, sketching and printmaking, singing and music making, and creative writing, but also in general educational studies especially in the humanities and social sciences. Even assuming that only 50% of those who expressed an interest were in fact to enroll, this would
more than double the number of adults engaged in educational activities.
The study suggests that a number of measures could be taken to meet this demand. In addition to providing courses and other educational facilities in the fields of interest to older people, attention should be given to providing these courses and facilities in appropriate formats and environments and at appropriate times and places. More daytime programs and social-cum-educational programs based in local halls, community centers, libraries, homes for the elderly, and private homes, as well as individualized programs based on the new information technology, could be organized. Attention should also be given to the development of more effective forms of publicity to attract older people, to the provision of more effective transport facilities, and to recruiting and training tutors including older people themselves who will use appropriate methods to take advantage of the strengths and assist in overcoming the weaknesses many older people bring to their learning.

To achieve all this will require the development of formal and informal mechanisms of consultation and cooperation between educators and older people and the organizations that represent their interests. A likely consequence of this would be the development of some programs planned and directed by older people themselves or intended primarily or exclusively for older people. A variety of models of different kinds of programs are available. They include, in New Zealand, the Canterbury Workers' Education Association's (WEA) Wider Horizon program, established in the 1970s (see Roth, 1974); SPAN, a program designed to span the generations, established in Dunedin in 1986 (see Somerville, 1987); and the New Zealand College for Seniors, established in 1988. Overseas they include the International Elderhostel Movement and the Universities of the Third Age. In addition to this, however, it is likely that a wide range of other programs and learning opportunities would be developed, and modifications made to existing programs to the benefit not only of older people but also of a large number of others who would be interested in the same program areas or who are confronted by similar disabilities and difficulties to those which many older people confront. It is interesting to note, for example, that the WEA Wider Horizon program was initially intended primarily for and planned and directed by older people. However, over the years, it has drawn increasingly on a very much wider age group, so that today, although considerable numbers of older people are still involved in planning and directing the program and as participants, it no longer caters primarily to or is exclusively for older people.

In addition to these educational initiatives, there are other kinds of initiatives that link education more directly with political action and mobilization. They require widespread discussion and debate as well as action by older and younger people. First, there are a wide range of social, economic, health, and welfare measures that may be taken to maintain the quality of life of the current generation of older people and to enable them to retain control over their lives without being subjected to unnecessary struggles for mere survival. This article cannot take up all these issues. However, unless such measures are taken, educational initiatives on their own will at best continue to affect only a small minority of older people.

Second, for the sake of future generations of older people if not for this one, measures should be taken to encourage everyone from an early age to develop worthwhile interests that may be pursued throughout their lives, and to foster on the widest possible scale a change of attitude that would encourage people of all ages to recognize that it is never too late to learn or to take up new interests. Those who develop a special interest or maintain and develop a wide range of interests during their early adult years are more likely to maintain these and other interests in their later years. However, oppressive or restrictive work and home environments, which negate the individual's capacity for creative work and action and full participation in decision making, are likely to inhibit and prevent people from developing and pursuing worthwhile interests, and too great a preoccupation with narrow job-related interests may well be counterproductive to the individual's later development.

Third, measures should be taken to overthrow those structures and policies, both covert and overt, which maintain institutionalized ageism in New Zealand society and hence inhibit or restrict the participation of older adults in many fields of education. Legislation, policies, and practices that are based on age-graded criteria in the recruitment, selection, training, and retirement of adults in the workplace or in leisure and recreation should be amended, and
changes should be brought about in socialization practices to ensure the removal of age-based stereotypes and the legitimation of a wide range of life-styles and interests among older people.

**Theoretical Perspectives on Policy**

These then are some of the measures that need to be taken if older people are to be encouraged, stimulated, and supported in their efforts to pursue their interests and continue their learning. The ways in which we set about implementing these measures and the importance we attach to the various kinds of measures will depend to a large extent on the theoretical perspective we bring to bear on the issues.

First, there are those who adopt a functionalist sociological perspective. This assumes the desirability and possibility of increasing educational participation by older people without changing significantly the political and economic structures that affect participation. Many functionalists, placing their faith in a free-market, economistic, individualistic model of society, would be reluctant to advocate greater state intervention to achieve these goals. They might well advocate the abolition of legislative and administrative barriers to the employment of older (and younger) people and the provision of a more flexible free-market system of education for younger and older people who, by means of their own earnings and with the help of insurance schemes and policies, would finance and control their own educational programs. In the view of such people, many of the educational initiatives suggested in this article should be undertaken by private educational entrepreneurs (for whom the data presented here and in my previous article would provide some useful if somewhat dated market guidelines). Because they treat all men and women equally, market mechanisms are seen as those most appropriately used to attain the greatest measure of equality among individuals. Policies that limit the amount of state subsidy and hence interference by the state and its bureaucracies, and which require the user to pay most if not all of the costs of educational and other services, ensure that the providers of these services remain directly accountable to their individual consumers.

Many functionalists, however, argue that this ideal-type model is not wholly appropriate in its application to all forms of education and social policy in modern industrial societies. The necessity to invest in the formation of human capital is used as a justification for public investment in basic general education and in certain forms of vocational education. In addition, it is argued that in such societies and especially those in which there is a commitment to political democracy, it is necessary that each and every citizen have the opportunity to gain basic literacy and numeracy skills and maintain a basic minimum standard of living. These arguments provide a further justification within the functionalist framework for public investment in basic education for young people and for adults and for some of the social, economic, health, and welfare measures referred to earlier.

A second theoretical perspective is that adopted by those who place considerably less faith in the free market and considerably more emphasis on the divisions and conflicts that arise in all human societies over the creation and distribution of wealth, status, and power. This perspective puts its faith in political action, and although its adherents would not abrogate the free-market economy, they would be advocates of state intervention to achieve the goals outlined here. They might well advocate political education and action programs, including attempts to mobilize older people and other subordinate groups to claim their rights and overthrow those structures and amend those policies that maintain institutionalized ageism in society. This would include the abolition of legislative and administrative barriers to the employment of older people.

However, those adopting this perspective would go much further in seeking political, cultural, and economic intervention by both the state and other agencies and institutions to remove all obstacles faced by older people and to ensure that the myths and stereotypes about older people are effectively challenged, and that all older people are enabled to enjoy a rewarding and active old age, which would include the right to continue their education and pursue their interests in whatever direction they wish. Within this perspective, then, the
necessity to engage in educational and political action to gain more power for older people and especially those drawn from the most powerless and poorest section of society is widely accepted, as is the necessity to redirect the power of the state and its institutions to remove all forms of discrimination based on age and all forms of institutionalized ageism.

Finally, a third theoretical perspective is taken by those who reject the free market and who see it as a key mechanism by means of which the capitalist class maintains its exploitation of the working class. Those who adopt this perspective put their faith in various forms of action-political, industrial, and educational-which seek the overthrow of capitalism. They advocate state intervention to achieve the goals outlined here, and might well advocate programs very similar to those advocated within the previous framework. However, they seek to widen the dimensions of the struggle and to develop strategies that would raise the consciousness of the working class, including older people, to the fact that institutionalized ageism is but one dimension of the very much wider class struggle occurring not only in New Zealand but in all capitalist societies.

The role of the state and its institutions in this view is ambiguous. The capitalist state is necessarily a creature of the ruling class, and educational institutions necessarily serve the interests of capitalism. However, they also reflect the contradictions inherent within capitalism, and hence, to some extent at least, it is possible to engage in the struggle against capitalism within the state's own structures and institutions. Moreover, under conditions of advanced capitalism, it is necessary for the working class to engage in political action within the framework of the state and its institutions. This includes in particular the necessity to claim educational resources to extend the provision of educational facilities to all sections of the working class at all ages and to challenge the bourgeois hegemony that is maintained in part through educational curricula and their hidden agendas.

CONCLUSION

The outcome of the debates between the proponents of these three perspectives are of critical importance in the development of policies and strategies affecting the education of all adults including older people in New Zealand. Survey research of the kind on which these articles are based provides a starting point for debate, and I urge that a further national survey similar to that undertaken in 1978 be undertaken in the near future. In addition, much more theoretically grounded research that goes beyond identifying patterns of participation and interest is essential if the real issues that confront strategists and policymakers concerned with the education of older people are to be clarified. For example, research should be undertaken that seeks to explain these patterns of participation through the examination of curriculum issues raised within individual programs and on a wider basis.

It may well be that several advances in the education of older people have been made since the late 1970s when the survey reported in this article and my previous one was undertaken. Brief references were made earlier to two contrasting recent initiatives: the establishment of SPAN and the New Zealand College for Seniors. The former is a locality-based program, the aim of which is to bridge the generations by making the skills and knowledge of older people easily accessible to others; the latter is a national network of institutions organized to provide courses for those 55 and older to provide intellectual challenges and new life experiences within relaxed and friendly environments. These are not the only initiatives. For example, in Christchurch in 1986, after meeting for several months, a group supported by the Community Services Division of the City Council produced a series of leaflets designed to inform older people of existing learning and recreation opportunities, and more recently the Canterbury WEA set up a group that is exploring the possibility of establishing one or more locality-based programs, and Hagley High School has piloted a telephone linkup to serve the learning interests of those older or younger people who cannot readily get to classes. In addition, current educational reforms should make it easier for those educational institutions, voluntary organizations, and groups wishing to provide a wider range of programs for older people to do so. In addition to these program developments and possibilities, it is important to note the work undertaken by the Social Advisory Council (1984), the Royal Commission on Social
Policy (1988), and the Aging and Education Working Party established by the National Council of Adult Education (1987). All three bodies attempted to stimulate debate and action on the position of older people, and the reports of each of them contain a large number of educational recommendations. As a result of these and other developments and initiatives, it is possible that there is greater scope and opportunity for older adults to pursue their interests and greater acceptance by the state and some institutions as well as by an increasing number of New Zealanders of the legitimacy of older people engaging in a variety of educational pursuits than there was 10 years ago.

Nevertheless, there have also been major setbacks. Many of these can be attributed to the continuing economic decline and the policies of successive governments. The radical restructuring of the New Zealand economy since 1984 has led to unprecedented levels of unemployment, large-scale redundancies, and enforced early retirement as well as increased bankruptcies. This has affected people of all ages, but its effects on young adults and those in their 50s may be particularly severe. The level of state funding of a wide range of services has been reduced. 'User-pays' policies have been introduced in a number of state services, whereas others have been corporatized or privatized. This may or may not increase efficiency, the evidence is at best equivocal. What it will do, however, is have a negative impact on the distribution of knowledge and the accessibility of educational, social, and recreational programs and services to those on low incomes, which of course includes a high proportion of older people (Tobias, 1988). What successive reports have called for is that more, rather than less, resources should be made available by the state to facilitate and support the education of older people and to bring about the other changes referred to here, including the education and training of those who work with older people as well as programs and activities to counter the myths surrounding old age.

It is, therefore, crucial that those who are concerned about the education of older people seek to extend and promote the provision of educational opportunities for them, and involve them in planning and contributing to these programs themselves, as well as supporting, encouraging, and obtaining resources to enable them to develop their own programs, which may be either intergenerational or focused on meeting their own needs. If, however, these efforts are to succeed, it will also be necessary to engage in consciousness-raising activities and action in the wider political arena. It will be necessary to resist an ideology that suggests that human development can best be promoted by market forces, and instead work to bring about those structural and institutional changes in society that alone make possible the development of a truly effective educational service for younger and older adults from all sections of society.

REFERENCES


