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Lifelong learning activities for older adults: a scoping review

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ABSTRACT

The lifelong learning paradigm has become a global phenomenon, having an influence on the political organization of various countries. The aim of this study was to map lifelong learning activities for the older people so to understand how this paradigm has been incorporated into practical actions. The scoping review method was chosen and the literature search was conducted across five databases (Web of Science, Scopus, AgeLine, ERIC and MedLine) in English and between the years of 1972 and 2020. All peer-reviewed papers which presented the conceptual notion of lifelong learning as a central topic to the study, the target audience of older men and women (50+ years old) and which described formal, non-formal and informal educational activities, were included in the present research. A total of 2,083 records were found, of which 309 were selected for the full reading screening; this, in turn, resulted in 38 records included. Most of these studies were published in the last decade (66%), originating in North America (36%) and adopting a qualitative methodological approach (81%). The lifelong learning activities for older people were noticeably more frequent in the non-formal modality (60%), within a university context (46%) and from the perspective of the third generation of the concept (60%). It was concluded that there is an imbalance between lifelong learning activities for the older adults in the formal, non-formal and informal modalities and that the lifelong learning paradigm has been incorporated into practical actions by different conceptual generations.

Introduction

Educational opportunities for older people and the lifelong learning (LL) paradigm are subject matters which have been generating many academic and political debates for decades (Hachem, 2020; Lengrand, 1975; Lindeman, 1926). Educational proposals for the older person are not incipient and can be observed as far as the 16th century in initiatives undertaken by the educator Iohannes Amos Comenius (in Latin), in Czechoslovakia (Doll, 2016). However, within the academic field, the discussion on education for the older adult was propelled by American and European researchers with the publication of pioneering works between the 1950s and 1960s (Kern, 2018).

Within the field of educational gerontology, educational practices for the older person provide knowledge and abilities for this cohort of individuals to overcome challenges of contemporary life (Peterson, 1980). The political and social concerns about the educational movement for the older person are also important points of analysis in these practices (Formosa, 2011; Glendenning, 1989,

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1993). What is more, the recognition of education for older people on political agendas and the efforts to integrate it into international trends of LL have an influence on research and practical actions in educational gerontology, which, in turn, is considered an emergent field (Hachem, 2020) in a pre-paradigmatic stage of development (Kern, 2018).

Internationally, LL is aligned to sustainability as well as to the political, economic, and social development of communities, making this a reference principle on the political-educational agendas of several countries (Elfert, 2019; United Nations, 2015). The LL paradigm integrates and complements the three different types – or modalities – of learning: formal, non-formal and informal (Delors et al., 1996). Formal learning is defined by the organized education system, the activities are chronologically and hierarchically oriented; non-formal learning is considered to be any systematic educational activity that does not take place in the formal educational system and that offers different types of learning to specific subgroups of the population; and, finally, informal learning is understood as learning processes that occur in people's daily lives, who acquire knowledge, skills, attitudes or aptitudes (Findsen, 2002; Jarvis, 2004).

The integration between the different learnings contemplates the double functionality of education: the world view and, concomitantly, the ways to understand it critically. Access to knowledge – which is present from the beginning to the end of life – must allow adaptation and renewal in the face of a constantly changing world and, therefore, different learning must not be tied to a certain stage of life, or a single place (Delors et al., 1996). In this regard, LL presents itself as a wide concept and has been incorporated in a flexible and adaptable manner into diverse contexts and professional areas (Dehmel, 2006). Aspin and Chapman (2000) draw attention to the fact that there are many LL variants, which encompass not only educational, moral and political commitments, but also a philosophical perspective of practical action and theoretical discussion – including values and beliefs.

It is possible to identify three main generations of the LL concept (UNESCO-UIL, 2016; Wang et al., 2017). The first generation is recognised for its humanistic view in the 1970s, which links LL to the ideals of democracy and freedom (Elfert, 2019; Field, 2001) delving into discussions on the purpose of education – as presented in the Faure Report '*Learning to be. The world of education today and tomorrow*', published by UNESCO in 1972 (Faure et al., 1972). The second generation emerges in the 1990s with economicist approaches (Elfert, 2019). From this perspective, LL is considered a strategy to accelerate economic growth, as well as to generate jobs and competitiveness in society with an economy based on knowledge (Regmi, 2015). However, it is not always the case that institutions and organisational discourses interpret LL as a proposal of political and social emancipation (UNESCO, 2009), as reinforced in the Delors Report '*Learning: the treasure within*' – published by UNESCO in 1996 and which broadened the humanistic view of education by suggesting new educational routes throughout life (Delors et al., 1996).

At the turn of the 21st century, the third generation of LL enters the picture associated with the assurance of social inclusion and cohesion, especially within the European Union region (UNESCO-UIL, 2016) as several documents were written for the adoption of LL on political agendas (European Commission, 2000, 2001, 2018). The change from *lifelong education* to *lifelong learning* marks a new understanding of the educational process (Field, 2001; UNESCO, 2009), incorporating all life stages (*lifelong*) and domains (*life-wide*), and also requiring deepening (*life-deep*) and personal connection with what is learnt (Bélanger, 2016). The connective vision of LL is defended, which corresponds at the same time to economic progress, social inclusion, educational and personal growth needs of the older adults (Withnall, 2010).

Therefore, the research on the LL paradigm becomes important, as it has been referred to as a key decision-making tool in the adoption of healthy attitudes and behaviors, engagement and meaningful living in society (ILC-Brasil, 2015). In this respect, the offer of LL activities has direct implications for the promotion of active aging in different communities (Narushima et al., 2018), contributing to the adjustment of the older adults in the face of rapid social changes and helping them to reach higher levels of personal and social empowerment (Formosa, 2014). In addition, the LL suggests that it is the most sensitive proposal in view of the complex issue of learning for the older adults (Withnall, 2010).

However, few studies have dedicated their investigation to the different modalities of LL (*life-wide*) which are intended for older people (Talmage et al., 2019; Yamashita et al., 2017). Other review studies exploring similar purposes as to the present research have not been found in the literature. Furthering the knowledge of this theme can inform future investigations regarding theoretical-practical models within the field of educational gerontology, as well as offer a better understanding of the connection between the LL paradigm and older adult education. Accordingly, this study aims to map the LL activities for the older person so to understand how this paradigm has been applied to practical actions, especially focusing on the major challenges and the recommendations suggested by the studies reviewed.

Method

Outline

The present study represents a scoping review and was developed on the basis of recommendations presented by the Joanna Briggs Institute (Peters et al., 2020) as well as of the parameters established in the *Preferred Reporting Items for Systematic reviews and Meta-Analyses extension for Scoping Reviews* - PRISMA-ScR Checklist. The scoping review method was adopted because aims to identify the expansion of the theme in the literature, highlighting its key elements, main approaches and structures. Accordingly, the main point is not to synthesize, but to map the scope of the evidence found (Arksey & O'Malley, 2005). The scoping review protocol has been registered on the Open Science Framework platform under the following identification: DOI 10.17605/OSF.IO/YG426.

Inclusion and exclusion criteria

The inclusion criteria were elaborated based on original papers published in peer-reviewed journals, as well as on the PCC acronym – Population, Concept and Context. Regarding the first, Population, the reference for organising the pieces of information retrieved from papers was that of older people aged 60 or over. The definition of elderly people may be different based on a culturally and socially determined construct. Therefore, studies with elderly people aged between 50 and 60 years were also included in order to obtain a greater range of results in this scoping review. Addressing the second aspect of PCC, Concept, the conceptual notion of LL presented by UNESCO was considered, that is: ‘Lifelong learning is rooted in the integration of learning and living, covering lifelong (cradle to grave) and life-wide learning for people of all ages, delivered and undertaken through a variety of modalities and meeting a wide range of learning needs and demands’ (UNESCO, 2014, p. 01)); and this, in turn, refers to ‘All learning activity undertaken throughout life, which results in improving knowledge, know-how, skills, competences and/or qualifications for personal, social and/or professional reasons’. Finally, the Context criterium refers to the development of educational activities, based on LL, with no restrictions toward their format (e.g. lectures, courses, programs, workshops, meetings, classes, among others) and application (e.g. formal, non-formal or informal).

The time period chosen for the search for evidence was from 1972 to 2020, in the English language. The choice of starting point refers to the publication by UNESCO of the Report prepared by the International Commission for the Development of Education: ‘Learning to Be: The World of Education Today and Tomorrow’ (Faure et al., 1972), which is aligned to the central concept of this research. There were also no restrictions regarding the approaches adopted in the studies for data collection and analyses of data (e.g. qualitative, quantitative or mixed), study location, gender (e.g. studies including only men, women or mixed) or socioeconomic profile of the population under investigation.

The non-peer-reviewed papers, research protocols, expert opinion articles, letters to the editor, book chapters, master’s dissertations, doctoral theses, congress and conference proceedings were not included in this *scoping review*.

Operational process

This review was conducted through seven stages: (1) elaboration of research question and eligibility criteria; (2) performing of systematic searches; (3) identification and exclusion of duplicates across databases; (4) reading of titles and abstracts; (5) full reading of texts; (6) extraction of original data, and (7) composition of a descriptive synthesis. Two researchers worked independently in the phases of identification, selection and extraction of data, which used the same search strategy previously defined in the research protocol. Doubts and discordances were solved between them during consensus meetings.

Literature search

The gathering of available evidence was conducted by (1) performing, with the aid of a librarian, systematic searches on five electronic databases: Web of Science, Scopus, AgeLine, Education Resources Information Center (ERIC) and MedLine, covering available literature up to August 28th 2020, and based on the construct applied on AgeLine – e.g. ('older adult*' OR elderly OR 'older people' OR aged) AND ('lifelong learning' OR 'life-long learning' OR 'life long learning' OR 'lifelong education' OR 'learning throughout life') AND ('later life learning' OR 'later-life learning' OR 'later life education' OR 'later-life education' OR 'aging education' OR 'aging education' OR 'gerogogy' OR 'geragogy' OR 'andragogy' OR 'adult education' OR 'adult learning' OR 'permanent education' OR 'continuing education'); and (2) by readings from the list of references from the studies included. The complete electronic search of all databases can be viewed in Appendix 1.

Data charting

For the data charting process, an specific form created in a electronic spreadsheet was employed and organised into three parts: (1) bibliographic data; (2) characteristics of the studies and (3) specific information to answer the research question and the objectives of this review. The form was improved after the data charting of the first fifteen studies. It is important to mention that some papers were clear regarding the LL generation adopted in their studies, while some others were more diffused. Therefore, in the absence of an explicit identification of the LL generation by the authors, the contextualisation of the study was analyzed so to fit it into a corresponding viewpoint. Thus, the parts of the articles in which the authors described the concept of LL were observed and the contextualization was guided by the main characteristics of the conceptual generations LL previously identified in the literature. This approach of pre-defined organisation was chosen with the purpose of offering better data visualisation and understanding of the results (Lockwood et al., 2019).

It is also important to note that in some studies two or more descriptions of educational activities were found, which were also identified under different learning modalities. For instance, Boström (2017) describes two LL activities designed for older people in Sweden, one of which is considered formal (Study Circle) and the other informal (Knitting café); for this reason, the study fell into the categories of formal and informal. Likewise, the same criterion was adopted for studies which identified the same educational activity as hybrid, encompassing two or three LL modalities.

Educational activities were classified according to their scope and thematic area, such as: art and culture, citizenship, digital inclusion, empowerment, volunteering, higher education and multidisciplinary activities. Difficulties and recommendations/political strategies regarding the educational practices mentioned in the studies under investigation were extracted from the publications, and these were also organised into topics on the data charting table (available as supplementary material) in order to conduct the descriptive analysis. It is important to note, however, that information on the difficulties and recommendations were not identified in all papers included.

Data synthesis

The descriptive synthesis was elaborated based on the normalisation and summarisation of the spreadsheet, starting from the analysis of data from a general perspective, which was then followed by a focus on the objectives of this study. The objective of the descriptive synthesis is to present the evidence in an organized way, in a narrative, tabular and visual representation format in order to answer the scoping review research question (Tricco et al., 2018). In this respect, the studies were grouped according to categories and peculiar characteristics (e.g. methodological, modalities of LL activities, generation of LL, etc.).

Results

The search for evidence across the five electronic databases resulted in 2,083 records (Figure 1): *AgeLine* (933); *ERIC* (433); *MedLine Complete* (364); *Scopus* (172) e *Web Of Science* (181). In turn, the manual search through the reference lists from the studies included corresponded to one record only.

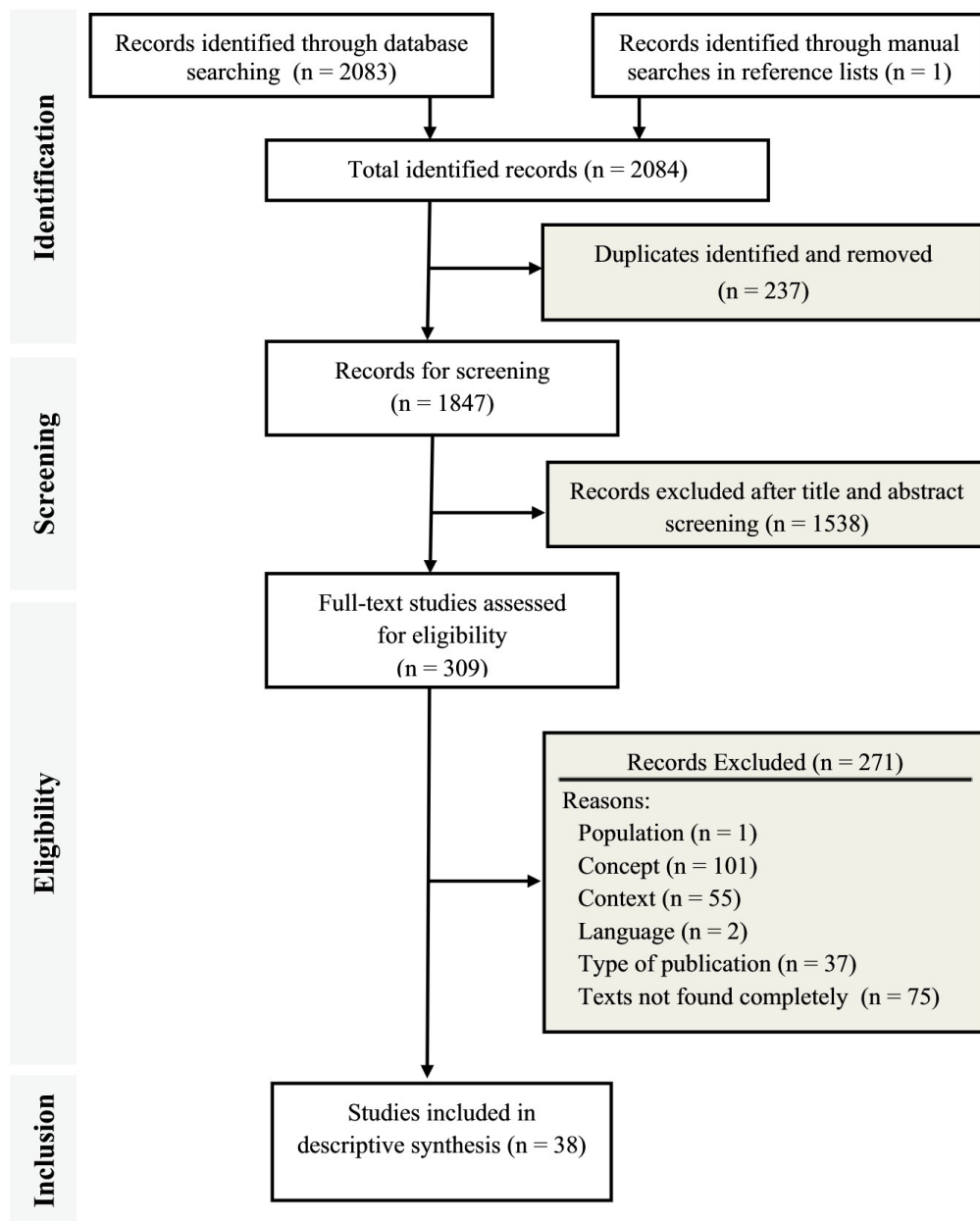


Figure 1. PRISMA flow diagram of the scoping review on lifelong learning activities for older adults. Source: Authors, 2021.

After the exclusion of 237 duplicate records from the databases, 1,847 were selected for the analysis of titles and abstracts. Finally, 309 records were classified as eligible for the present study, of which 271 were excluded after full reading by considering the following reasons: population $n = 1$; concept $n = 101$; context $n = 55$; language $n = 2$; type of publication $n = 37$ and texts not found in full $n = 75$. By the end of this process, 38 papers were included in the review for the descriptive synthesis, and these are detailed in Appendix 2.

Table 1 shows that, in the peer-reviewed literature analyzed, the interest in the theme of LL educational activities for older people has considerably increased over the last years, as seen from 2011 to 2020 ($n = 25$; 66%). Regarding location, the studies come from two main continental regions: Europe ($n = 15$; 39%) and North America ($n = 14$; 36%). The methodological approach adopted in the studies were predominantly qualitative ($n = 31$; 81%), with the application of different instruments for data collection and the combination of two or more of them ($n = 11$; 28,9%): documental analysis ($n = 22$; 52%) and interview ($n = 14$; 36%) being the most employed instruments. With reference to the identification of the sample population in the studies, the authors utilised different social, cultural and chronological parameters comprising a variety of terms to designate the older person (Figure 2).

Turning to learning modalities, Table 2 highlights a preference for non-formal learning for older adults ($n = 23$; 60,5%). Studies considered as hybrid ($n = 10$, 26,3%) presented or described the same – or more than one – educational activity as formal and non-formal ($n = 5$; 13,1%), formal and informal ($n = 1$; 2,6%), non-formal and informal ($n = 3$; 7,8%) and comprehending the triad of learning modalities ($n = 1$; 2,6%). These activities took place within different contexts, such as: nonprofit organisations, community groups for the older adult; public or private educational centers, libraries, art galleries, museums and, most frequently, linked to universities ($n = 21$; 46,6%). The learning themes considered as multidisciplinary for older people ($n = 22$; 50%) comprised of a variety of topics, such as language, painting, music, arts and crafts, history, health, computer skills and other technologies, environment, and social sciences.

Table 1. Descriptive characteristics of the studies included in the research ($n = 38$).

Variables	n	%
Year of publication		
1981–1990	2	5,2
1991–2000	5	13,1
2001–2010	6	15,7
2011–2020	25	65,7
Geographic location		
North America	14	36,8
Asia	2	5,2
Europe	15	39,4
Oceania	7	18,4
Methodological Approach		
Qualitative	31	81,5
Quantitative	5	13,1
Mixed	2	5,2
Data Collection Instrument ^a		
Document Analysis	22	39,2
Autoethnography	1	1,7
Interview	14	25
Photography	1	1,7
Focus group	3	5,3
Observation	8	14,2
Questionnaire	7	12,5

^aIt includes studies that presented two, three or more combinations of instruments for data collection.

Source: Authors, 2021.



Figure 2. Word cloud with the terminologies used to designate the elderly in the included studies¹.

¹ word cloud developed through the graphic resource available on the wordclouds.com website. Source: Authors, 2021.

Table 2. Descriptive characteristics of the studies included in the review, according to LL conceptual modalities and generations (n = 38).

Variables	n	%
Lifelong Learning modalities		
Formal	2	5,2
Non-Formal	23	60,5
Informal	3	7,8
2 or 3 modalities	10	26,3
Location of activities ^a		
Associations/Groups/Community Centers	15	33,3
Library	1	2,2
Educational centers	6	13,3
Art Galleries/Museums	2	4,4
University	21	46,6
Learning Themes ¹		
Multidisciplinary	22	50
Art and culture	7	15,9
Citizenship	5	11,3
Empowerment	1	2,2
Digital inclusion	2	4,5
Volunteering	2	4,5
Academic	5	6,8

^aIncludes studies with more than one educational activity and that reported more than one location dedicated to learning activities and themes.

Source: Authors, 2021.

Figure 3 presents the LL activities for older people in the formal, non-formal and informal modalities, while taking into consideration the conceptual LL generation adopted in the studies included in this investigation. Studies falling into the first LL generation (n = 11; 28,9%) were centered on the humanistic view of the concept and presented learning activities aligned to the notion of personal development and education being a right for older people. On the other hand, studies adopting the second LL generation (n = 1; 2,6%) focused on the necessary abilities and competencies for the acquisition of basic qualifications for the adaptation in contemporary society. In turn, studies subscribing to the third LL generation (n = 23; 60,5%) were more interested in matters related to social capital, citizenship, as well as social inclusion and participation. Lastly, a fourth LL generation has been identified among the studies under investigation (n = 3; 7,8%), in which the conceptual notion of the paradigm appears connected to personal and community wellbeing.

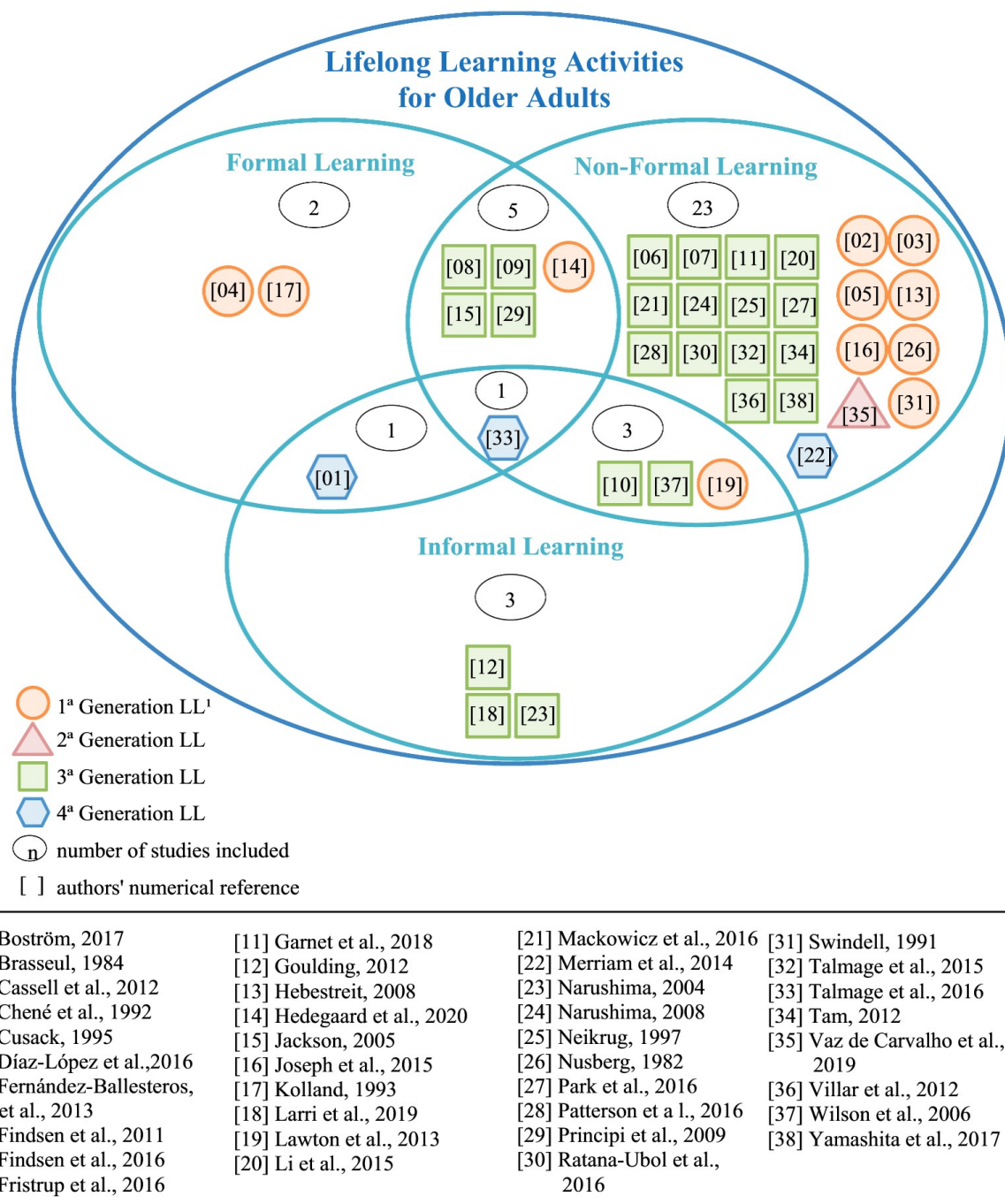


Figure 3. Lifelong learning activities for older adults in the included studies.

¹LL: Lifelong Learning Source: Authors, 2021.

Discussion

The present research has mapped educational practices for the older person based on the LL paradigm and from the perspective of different conceptual generations and learning modalities. The growing number of publications in the last decade demonstrates a greater interest in investigations on the theme, which has assumed a notable place on political agendas of many countries and organisations – such those of OECD, UNESCO and European Union (Withnall, 2010).

The results reported in this study confirm the North American and European influences on the LL activities for older adults. Both geographic regions are considered to be pioneering in debates on older adult education (Kern, 2018) and, as noted by Fejes and Nylander (2019), publications on adult education are predominantly authored by anglophones, of whom are more likely to publish in English language journals.

Despite this geographic concentration of studies, a diversity of terms to identify the older learner in the educational process has been found, which, in turn, demonstrates the need to consider cultural and regional aspects in LL proposals. Findsen and Formosa (2011) note that there is a variety of terms which are indiscriminately employed to designate older people within many ideological contexts, and thus the most appropriate approach is the recognition of the diversity of their meanings, as the terms originate in overlapping areas and local, sociocultural contexts.

The predominance of qualitative approaches found in this review corroborates the findings presented in Fejes and Nylander (2019). The authors evaluated a sample of 57 papers in three different English language journals – published between 2005 and 2012 – of which 88% fell under the qualitative domain. According to Jarvis (2004), older adult education and LL comprise a practical field of the social sciences which aims to generate knowledge from the gathering of meanings and is thus less prone to quantification. As a consequence, qualitative studies are more represented in this field, although there is room for quantitative research development (Jarvis, 2004).

With respect to learning modalities, non-formal learning was the LL mode with most investment for older people. Historically speaking, non-formal learning opportunities designed for older people had great visibility in the second half of the 20th century. Notably, a movement known as the University of the Third Age has been in operation for more than 45 years and it represents a global milestone regarding non-formal learning opportunities for the older person (Formosa, 2019a). One of the principal characteristics of this educational programme is its multidisciplinary nature regarding the topics covered (Formosa, 2019b), which is also evidenced in the results of the present study.

However, concerning the formal modality as reviewed in this study, LL activities for older people are scarce. This may be due to some important points, such as access to, scope and maintenance of the programmes by the institutions. Such aspects had been previously observed by Chene and Fleury (1992), who report that changes in priorities of universities in Montreal obstructed the management of formal learning programmes for people over 50 years of age. In addition, Findsen and Mark (2016) highlight the fact that policies of funding and support are two areas that are neglectful in formal learning for the older person, which reinforces the importance for the institutions to recognise this public's educational needs.

Older learners face a challenging situation as regards access to institutions which offer formal learning, as there is a “stereotype that ‘education is for the young’ and the resultant allocation of resources based on this preconception” (Findsen & Formosa, 2011, p. 84)). Therefore, the nonrecognition of older people as potential learners – both from political-governmental norms and by educational institutions, may lead to a reduction of funding investments for learning proposals focused on this target audience.

Addressing the informal modality, a reduced number of educational proposals were found in this study. This learning modality, however, is considered by some authors as the most important mode in old age. Brink (2017) explains that the use of formal, non-formal and informal types of learning is not equal throughout life and, thus, self-guided informal learning tends to stand out from the other modalities in later life – despite all modalities being feasible at this life stage. Customarily, the informal modality is marginalised and disregarded in political debates (Hager, 2012), although it is mentioned and accepted in the majority of current political documents, nationally and internationally (Rubenson, 2019).

In the present review, some informal educational experiences grounded in social movements were observed (Larri & Whitehouse, 2019; Narushima, 2004). From this viewpoint, there is an emphasis on the *life-deep* dimension of LL, which integrates personal values, beliefs and ideologies as important components in the learning process (Banks et al., 2007; Karlsson et al., 2011). As noted by Bélanger

(2016), learning must be present throughout the entire life cycle (lifelong), within all formal, non-formal and informal contexts (life-wide) and, in a deeper manner, connected to the amplitude of personal characteristics and meanings (life-deep).

It is important to highlight that for the true meaning of LL, the learning modalities must not be fragmented nor separately implemented; it is, therefore, expected an integration among the formal, non-formal and informal types of learning (Delors, 2013). In this light, only one study was found in the present review, despite the fact that making connections among the three LL modalities is a key factor to making it useful the knowledge, abilities and information acquired by people throughout life (Biao, 2015).

Besides the aforementioned functional domain, the studies reviewed also presented their adopted LL generation. The conceptual notions of LL are guided by ideological, philosophical and political matters (Tuijnman & Boström, 2002) which, in turn, carry practical implications for the development of educational activities (Aspin & Chapman, 2012). The predominance of the third LL generation in this review suggests an inclination toward themes such as inclusion, social participation and citizenship in the elaboration of activities.

As pointed out in the studies reviewed, personal development and social inclusion are two key themes in LL (Garnet et al., 2018), where the first is of upmost importance for social transformation to occur (Neikrug, 1997). Accordingly, studies falling into the third LL generation can be seen as an expansion of the humanistic model from the first conceptual generation, as their educational activities for the older person took into consideration both personal growth and self-fulfillment as well as guarantee of rights. In view of the third LL generation, it was possible to observe characteristics of the critical perspective of educational gerontology, which considers the elaboration of educational proposals for older people beyond self-fulfillment: within a socio-political framework focused on emancipation, empowerment, transformation and social control (Formosa, 2011; Glendenning, 1993).

The emphasis on the third LL generation also emerged in the sense of overcoming the economicist perspective of the second conceptual generation. In the literature, several authors mention the difficulty in implementing the concept in its broad sense (Aspin & Chapman, 2000; Dehmel, 2006; Elfert, 2019; Field, 2001), as presented in the Delors Report (Delors et al., 1996; UNESCO, 2009). In many cases, LL linked to the third generation occurs solely within discursive rhetoric, while practical actions tend to be grounded on the second generation (Findsen & Mark, 2016; Jackson, 2005). Furthermore, older people are excluded and not considered in governmental initiatives which are guided by educational policies focused on high production, profitability and employment (Formosa, 2019b).

Nevertheless, this study has evidenced a fourth conceptual generation of the LL paradigm, which is related to community and personal wellbeing. This generation was not identified in the main intergovernmental documents previously investigated. Therefore, it is possible that the results of the present review, based on peer-reviewed literature, point to a new understanding of LL. The connection between learning and wellbeing was observed in an integrative learning proposal applied to an university context (Talmage et al., 2016) and, also, through the examination of the concept of social capital (Boström, 2017; Merriam & Kee, 2014). Research has been demonstrating that older learners seek depth and amplitude in their learning experiences (Talmage et al., 2015), and if these are oriented toward generativity, they can increase the older people's contributions to common good (Villar & Celdrán, 2012).

The principal challenges regarding the LL practices for older people – as found in this review – can be subsumed into two levels: micro (linked to the older learners' specificities) and macro (political, governmental and institutional structures), which mutually affect each other. The present analysis reinforces the need for a broad and integrative view toward LL; this is because the promotion of LL activities – that is, their names, objectives, content and type of organisation – are influenced by values and beliefs which are deeply ingrained and, most often, unknown and underlying (Aspin & Chapman, 2012).