



賽馬會齡活城市  
Jockey Club Age-friendly City

# AgeWatch Index for Hong Kong Topical Report on Capability



香港中文大學  
The Chinese University of Hong Kong



香港中文大學  
賽馬會老年學研究所  
CUHK Jockey Club Institute of Ageing

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The Hong Kong Jockey Club Charities Trust  
同心同步同進 RIDING HIGH TOGETHER

# AgeWatch Index for Hong Kong: Topical Report on Capability

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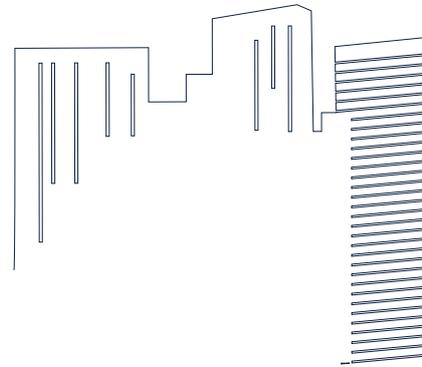


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## Preface by The Hong Kong Jockey Club

Ageing populations present challenges to governments and societies around the world. It is important to identify and address these challenges and collectively work towards building an age-friendly city.

Since 2015, The Hong Kong Jockey Club Charities Trust has been working in partnership with Hong Kong's four gerontology research institutes to implement the Jockey Club Age-friendly City Project. To provide a more comprehensive assessment of the social and economic well-being of the city's elderly, the Trust has commissioned the CUHK Jockey Club Institute of Ageing to compile reports on the local AgeWatch Index for Hong Kong and the newly developed Hong Kong Elder Quality of Life Index.

In addition, to provide more in-depth analysis, a series of topical reports focusing on the four domains of the AgeWatch Index, namely income security, health status, capability and enabling environment, are being published periodically.

This report on capability examines the capabilities of older people, using measures such as employment, education and life-long learning, use of information and communications technology, and social and civic participation. The report also discusses policy initiatives for the elderly in Hong Kong and presents practices adopted in other cities.

We believe that multi-sectoral collaboration is important to increase the elderly's capabilities. With active participation, positive and healthy ageing can be achieved.

Last but not least, we are delighted to share that the Jockey Club Age-friendly City Project has been selected as one of the eight best projects to be presented in the Global Solutions Forum 2020 under United Nations' Sustainable Development Solutions Network. The Forum brings together sustainable development experts from around the world to showcase how they are implementing local initiatives that are advancing the Sustainable Development Goal.

On behalf of the Trust, I would like to express my sincere thanks to the CUHK Jockey Club Institute of Ageing for compiling the Index and publishing this series of topical reports. We hope these publications will inspire and encourage us all to take proactive steps towards improving our city's age-friendliness.

### **Mr Leong Cheung**

*Executive Director, Charities and Community  
The Hong Kong Jockey Club*

## Executive Summary

This is the third report of the topical report series of the AgeWatch Index for Hong Kong. Each report in this series investigates significant worldwide trends and initiatives of one domain of the Global AgeWatch Index (i.e., income security, health status, capability and enabling environment), in particular to the local context of Hong Kong. This series provides a broader context of the four domains included in the annual report on Hong Kong Elder Quality of Life Index incorporating AgeWatch Index for Hong Kong.

This report provides a detailed discussion of the domain of capability in Hong Kong. It illustrates the concept of capability in the context of ageing, and presents examples of policy initiatives for improving elders' capability in Hong Kong. The report aims to improve readers' awareness of strategies to create an age-friendly environment in Hong Kong.

## 行政摘要

本報告為「香港長者生活質素指數」專題報告系列的第三本報告。每本專題報告以香港為例，探討有關「全球長者生活關注指數」四個領域（收入保障、健康狀況、能力和有利環境）之一，講解重要的國際趨勢及行動。此系列增補「香港長者生活質素指數」，有助讀者了解香港長者不同領域上的福祉。

本報告詳盡討論香港在「能力」領域上的表現，闡述了老齡化及能力的概念及強調長者能力的重要性，並介紹在香港實施以提高長者能力的政策。本報告旨在提高大眾對建立長者及年齡友善香港的關注。



# Chapter 1

## Age and capability



# Chapter 1

# Age and capability

## 1.1. Importance of capability for older people

Due to population aging, we see a growing number of retired older people who may be frail and dependent, resulting in an increase in healthcare costs and considerable economic societal burden (Robertson, 1997). Yet, according to the proponents of successful ageing this projection does not represent an inevitable scenario, and it is likely that older people may contribute to an important source of social capital. Rowe and Kahn provided a “successful ageing model” which focuses on health promotion and prevention of disease and disability, while maintaining high mental and physical functioning as well as remaining socially engaged amongst older people (Rowe & Kahn, 1997). A “Capability Approach” has the potential to facilitate this model and empower older people to achieve successful ageing. The capability approach provides an environmental, social and ethical framework for policy research on healthy ageing by considering the impact of social and physical environments and the diverse values of older people (Stephens, 2016).

## 1.2. Capability and well-being

### 1.2.1. Sen’s capability approach

Amartya Sen first suggested a capability approach in 1993 (Sen, 1993). The approach is a way to understand the well-being of older people based on social and ethical orientation. It captures well-being with capability, leading to physical and mental functions in the ways that they value the most (Sen, 1993). Sen’s description of the capability approach stems from economic analysis and the concept shifts the focus of well-being, quality of life or living standards derived from concerns on the access of material goods to the values of actual lives, such as being healthy, well-fed and socially respected (Sen, 1987). Sen’s theoretical framework emphasizes on the capability to function in valuable ways, that is, what individuals are able to do and be and the level of their freedom to pursue their own life (Sen, 1992, 1993). The opportunity available to older people to lead the life they value the most depends on their well-being or quality of life, and this essentially forms the central principle of the capability approach (Sen, 1987, 1992, 1993).

From the perspectives of Sen’s capability approach, our understanding of the nature of well-being shifts from “the production and demonstration of ‘health’” to “the capability of older people to pursue the life they want and value the most”. We need to recognize differences in health, education, resourcefulness and social connections, which may affect the process of turning resources into well-being and accounts for the diversity of social and cultural values (Stephens, 2017). The capability approach, as described by Stephen and Breheny, provides a “*basis for distancing the construction of the well-being of older people from oppressive ideals of personal responsibility and the denial of physical ageing*” (Stephens & Breheny, 2019), and promotes our understanding of well-being among older people in a wider social and environmental context by considering their capability and freedom of making informed, valuable choices. The aspect of “Freedom” is based on environmental aspects that either support or prevent valuable functionality (Sen, 1992, 1993). In summary, the capability approach transforms the constructions of successful ageing from “*a focus on individual responsibility for well-being with its moral implications*” to “*one which can include the social and environmental context of ageing and well-being*” (Stephens, 2017).

### 1.2.2. The WHO Active Ageing and Healthy Ageing Framework

The capability approach is manifested in the World Health Organization (WHO) Active Ageing and Healthy Ageing Framework. The WHO launched a global strategy and action plan on active and healthy ageing in 2015, and the capability approach was adopted as a part of the theoretical underpinning of the strategy (World Health Organization, 2016). The overall understanding and recognition of ageing and well-being are continuously evolving from “dependence” to “successful ageing” and the WHO introduced a timely, global strategic framework to strengthen the importance of “functional ability” of older people worldwide. This effort complements the recognized need to synthesize best available evidence and establish global partnership in order to support the WHO initiative of “Healthy Ageing” from 2020 to 2030 (World Health Organization, 2016). The WHO defines “Healthy Ageing” as *“the process of developing and maintaining ‘functional ability’ that enables older people to be well-being”*, which refers to the “capabilities” to be and to do what they want and value the most. Functional ability within this context consists of the intrinsic capacity of older people, the surrounding environmental characteristics and the interactions between them. The overall ability of older people to meet their basic needs, to learn, grow and make decisions, to build and maintain relationships with others, and to contribute to society forms the underlying principle of “Healthy Ageing” (World Health Organization, 2017).

### 1.3. Capability of older people at a national level: the Hong Kong Elder Quality of Life Index

There is a lack of consensus on the assessment criteria on capability of older people at the national level. Consequently, the Chinese University of Hong Kong (CUHK) Jockey Club Institute of Ageing developed the Hong Kong Elder Quality of Life (HKEQOL) Index, with “Capability” as one of the 4 domains (Figure 1.1). This aligns with the concept of capability in the Global AgeWatch Index with core indicators relevant to “Age-friendly City” from the WHO in order to better reflect the well-being of older people in Hong Kong. The domain of ‘Capability’ in the HKEQOL Index includes 6 indicators: (i) employment of older people; (ii) educational status of older people; (iii) use of information and communication technology (ICT); (iv) social participation; (v) civic participation; and (vi) lifelong learning (The CUHK Jockey Club Institute of Ageing, 2018c).

#### Employment of older people

Fair and stable access to the labour market is directly related to the ability of older people to supplement their pension income with additional wages as well as to reach out to employment-related support networks. Therefore, national employment rates of older people are used as a proxy indicator of economic empowerment amongst older people.

#### Educational status of older people

Education, knowledge, skills and attitudes are key competencies for well-being in later life and this indicator reflects potential inherent in social and human capital potential in older people.

#### Use of information and communication technology

The knowledge and use of various innovative information and communication technologies such as the World Wide Web, telecare and smartphones by older people is a useful indicator to evaluate whether the aged population is aware of the latest technological trends and is capable to use ICTs in their daily routine.

### Social participation

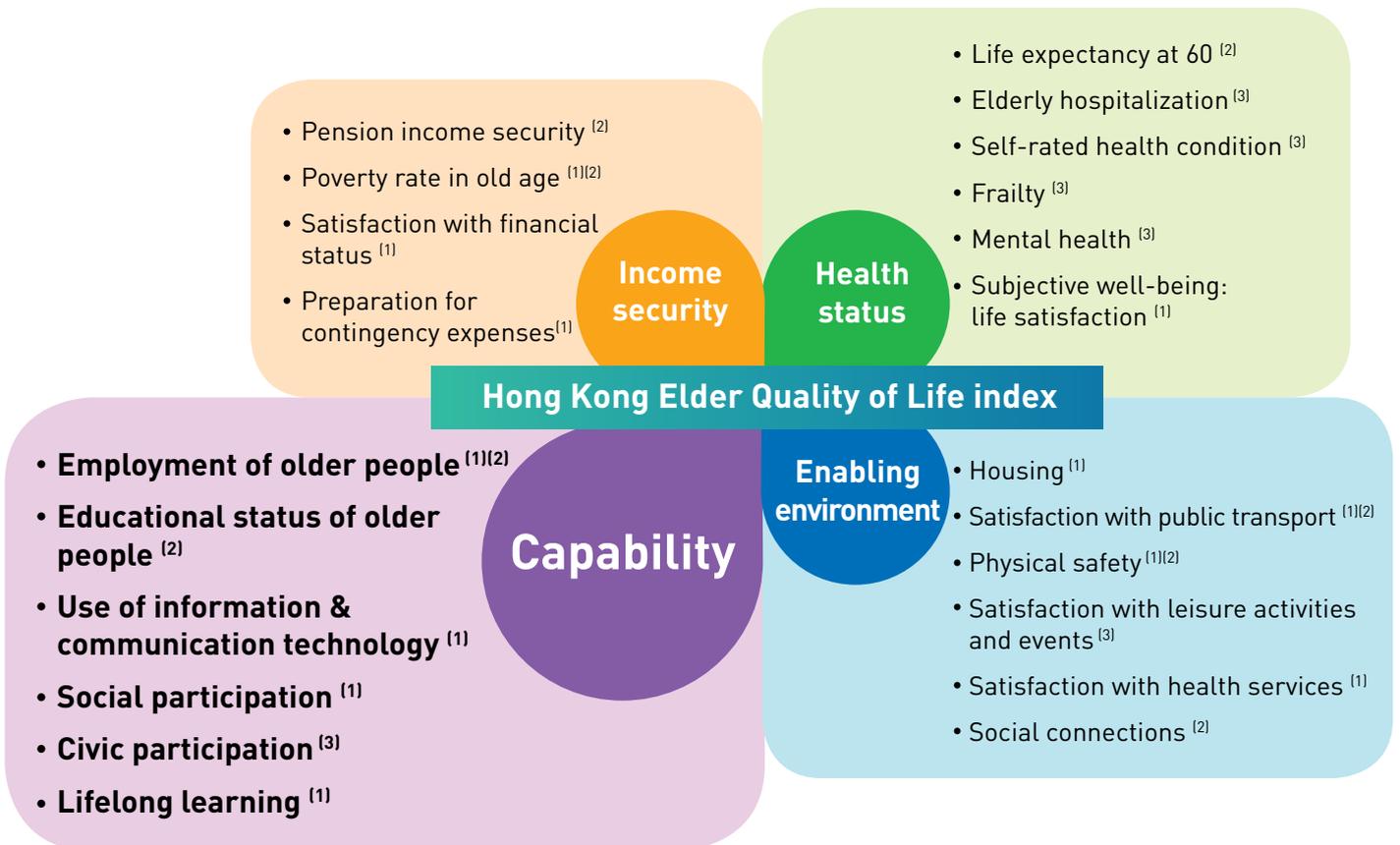
This indicator measures the proportion of older people who participate in volunteer activities for at least once a month. Volunteering is recognized as an important factor to positive, healthy ageing and the ability to provide volunteer-based informal community services is a crucial aspect of capability empowerment for active social engagement.

### Civic participation

The level of civic participation and engagement by older people is regarded as a capability indicator as civic participation helps to improve self-rated health and functional impairment of older people, leading to better quality of life.

### Lifelong learning

Lifelong learning helps older people to develop/enhance the skills and knowledge necessary to make informed choices, especially during crisis and transition in later life. This indicator measures the proportion of older people who have enrolled in education or training activities over the course of one year.



**Figure 1.1 The components of the Hong Kong Elder Quality of Life Index (HKEQOL)**

Source: The CUHK Jockey Club Institute of Ageing (2018)

(1) Indicators covered in *Measuring the age-friendliness of cities: A guide to using core indicators* (WHO, 2015)

(2) Indicators covered in *Global AgeWatch Index, HelpAge International*

(3) Indicators proposed by the CUHK Jockey Club Institute of Ageing & CUHK Centre for Quality of Life

## Chapter 2

# Employment



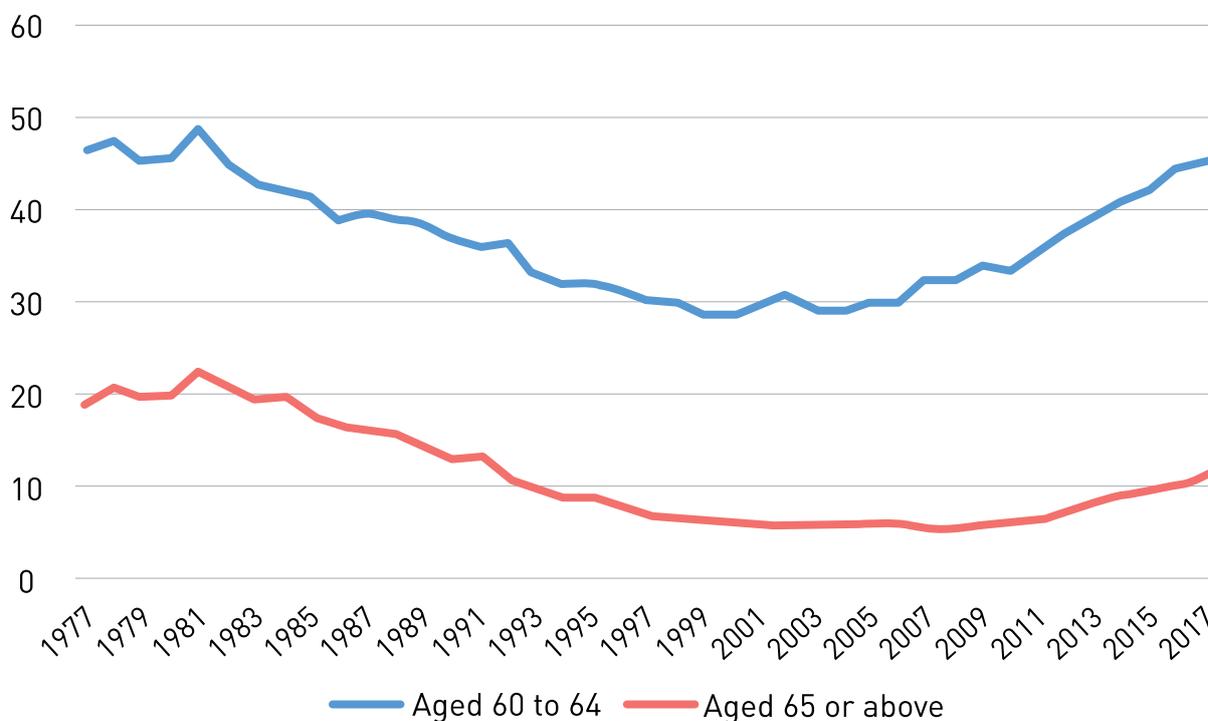
## Chapter 2 Employment

Employment agencies and labour organizations from around the world have long been working tirelessly to address the effects of population ageing on the global labour market. For instance, the Organisation for Economic Co-operation and Development (OECD) presented a policy agenda titled “Live Longer, Work Longer” to tackle the challenges of population ageing in 2006 (The Organisation for Economic Co-operation and Development, 2006). A follow-up review on ageing and employment with country-level case studies and cross-country reports was subsequently released in 2018 (The Organisation for Economic Co-operation and Development, 2018a). The review evaluated the influence of newly established social and employment policies and identified potential policy measures for good practice. Case studies on ageing and employment from various OECD countries including Japan, Korea, United States, Netherlands and France collectively demonstrated the impact of population ageing on the global labour market, and with policy examples, the review provided country-specific recommendations on tackling employment issues amongst older people. This recent review, along with other reports reviewing the ageing labour market of OECD countries (The Organisation for Economic Co-operation and Development, 2018a), highlights employment as a global challenge in population ageing.

The United Nations (UN) also emphasized the challenges different countries will face in future. It projected that one-fifth of the world population will be aged 60 or above in 2050 (United Nations, 2017). Hong Kong was listed as one of the ten countries or areas with the largest share of older adults by that time with 40.6% people aged 60 or above in 2050. For local statistics, a recent report from the Hong Kong Census and Statistics Department showed that the proportion of adults aged 60 or above increased from 16.6% in 2007 to 23.5% in 2017 (Census and Statistics Department, 2018b). As adults who are approaching later life tend to live longer, are healthier and more highly educated, their employment status, opportunities and sustainability are the center of attention for government agencies and corporations worldwide.

### 2.1. Labour market participation

According to the Hong Kong Census and Statistics Department, participation of older people in the labour market has been declining since the early 1980s due to structural transformation of the economy and gradual phase-out of the manufacturing sector. Over the flourishing period of the Hong Kong manufacturing industry from 1977 to 1984, the employment rate of adults aged 65 or above maintained at around 20%; a rate of around 45% was observed amongst adults aged 60 to 64. As a growing number of manufacturing factories relocated to mainland China in the 1980s, the less educated, older workers were being marginalized and forced to leave the labour market to give way to the service industry which favours younger, better educated workers. This structural change in economy led to a major change in the distribution of the labour force, especially for adults aged 65 or above, for which the employment rate declined to below 10% from 1993 to 2016. Unlike the trend observed for adults aged 60 to 64 in which there was a rise in employment rate since the early 2000s, for those aged 65 or above the labour force participation rate remained low level, reaching 11.0% in 2017 (Figure 2.1) (Census and Statistics Department, 2018b).



**Figure 2.1 Labour market participation rate of older people from 1977 to 2017**

Source: Census and Statistics Department (2018b)

The labour market participation rate of people aged 65 or above in Hong Kong in 2017 was very low compared with some other developed countries such as South Korea (31.5%), Japan (23.5%), the United States (19.3%) and Canada (14.2%) (The Organisation for Economic Co-operation and Development, 2018b). Although it could be argued that the contributions of the manufacturing sector to the gross domestic product (GDP) in these countries were much higher than in Hong Kong (27.6% in South Korea, 20.7% in Japan and 11.2% in the United States (The World Bank, 2019), policies targeting employment of older people and promoting age-friendly labour market in these countries have also contributed to the higher labour force participation rate. For example, multiple workforce strategies to encourage employment of older peoples were implemented in South Korea, which included government subsidies to employers and employees for reduced working time, extension of retirement age, and initiatives to re-employ employees aged 60 or above (Ministry of Employment and Labour, 2017).

In view of the marked differences in labour market participation rates of older people between Hong Kong and other developed economies, the Government of HKSAR developed a special topical report entitled “Labour force in Hong Kong: Trends in older age groups” to address concerns over the overall ageing workforce, the labour market participation rate of the older population and its effects on labour market developments (Hong Kong Economy, 2017b):

*“The more active participation of older age groups in the local labour force is a timely development to help alleviate the tight demand-supply balance in the market, as well as an indication of the high degree of flexibility and responsiveness of the local labour market.” (p.86)*

In the Hong Kong Half-year Economic Report 2018 (Hong Kong Economy, 2018), the government recognized the need to encourage and support older people to participate in employment and stated:

*“Recognising the importance of more active participation of older people in the workforce when facing the challenges of population ageing, it will be desirable to assist older workers, if they so wish, to participate in the labour market.” (p.81)*

Recent unemployment and underemployment rates of older people were low as compared with the general population, with 2.2% of older adults perceiving themselves as being unemployed in 2017 as compared to an overall unemployment rate of 3.1% for the entire population (Census and Statistics Department, 2018b). For underemployment, 1.4% of all older people were reported as underemployed in 2017; for the overall labour force the rate was slightly lower at 1.2%. However, the figures of labour force participation, unemployment and underemployment reflect only certain perspectives of the economic status of older people as most of them were economically inactive due to different reasons. In 2017, 78.3% of older people aged 60 or above were reported to be economically inactive (66.2% were retired; 8.7% were homemakers) (Census and Statistics Department, 2018d), and they constituted over half of the economically inactive population. The precise situation remains unclear as older people who have to retire involuntarily are generally categorized as “retired” because of the usual retirement culture and practice among private companies in Hong Kong. Although there is currently no statutory retirement age in Hong Kong, employees generally retire at the age of 60 or 65 in the civil and private sectors according to sector-specific policies and conditions. The Chairman of Elderly Commission, Dr. Lam Ching-choi, recently described this practice as “forced retirement” and “a form of age discrimination” (Siu, 2018).

To gain a more comprehensive understanding of older people’s challenges and opportunities in employment, different determinants of labour market participation are discussed in the following paragraphs.

## 2.2. Determinants of labour market participation

Multiple personal, community, governmental and societal factors affect the desires and needs for older people to remain or to re-enter the labour market, which include education level, financial situation, health status, government policy, social atmosphere and labour market environment.

### 2.2.1. Education level

Various historical changes in education policies in Hong Kong play a pivotal role in altering the labour market outlook. In the 1950s, the Hong Kong government began to expand the number of kindergartens, primary and secondary schools in order to widen coverage of the education system to the booming population. The number of schools increased from 828 in 1950 to 2911 in 1970 (Census and Statistics Department, 1969; Census and Statistics Department, 1978). By 1971, nearly 90% of children aged 5 to 14 attended full-time educational institutions (Census and Statistics Department, 1978) and this generation would have either retired by now or are expected to retire in the near future. In addition, the policy to provide 9-year compulsory education to all children has been in place for over 40 years, which would also be expected to contribute to a foreseeable rise in the population of retired people with good levels of education in Hong Kong for the coming decades. As people who benefited from the government strategies to increase access to education in the 1970s are now steadily entering the later-life phase, their prospects of retirement and re-employment are subject to structural changes. Over the past decade, figures from the Census and Statistics Department revealed a dramatic increase of older people’s education levels, reporting that the proportion of older people aged 60 or above with some level of secondary education substantially increased from 32.0% in 2007 to 48.9% in 2017 (Census and Statistics Department, 2008b; Census and Statistics Department, 2018d).

Existing research and analyses illustrated that education level could be an important predictor of labour market participation after retirement (Angeloni & Borgonovi, 2016; Bjursell, Nystedt, Björklund, & Sternäng, 2017; Wang, Zhan, Liu, & Shultz, 2008). Older people with lower education levels were more likely to retire earlier, be unemployed or became a homemaker (Alavinia & Burdorf, 2008). Therefore, with a general higher level of education amongst older people in Hong Kong, one could expect that a large number of these educated workers are more likely to remain in the labour market.

### **2.2.2. Financial situation**

The decision to retire from the labour market is generally classified as voluntary or involuntary. The same approach applies to the decision to stay as an active member of the workforce. Reasons behind these decisions vary but it is likely that many decisions on involuntary retirement or involuntary labour market participation are the outcomes of financial difficulties. Involuntary retirement before the age of 65 is common in Hong Kong, and some retirees struggle with financial hardships and eventually turn to social security allowance, such as the Comprehensive Social Security Assistance (CSSA), Old Age Allowance and Old Age Living Allowance. Recently, the government adjusted the eligibility for “Elderly CSSA” from 60 years to 65 years of age. Therefore, people aged between 60 and 65 are now only eligible to apply for the general CSSA scheme with less financial support. As many private companies in Hong Kong require their employees to retire at the age of 60, the retirees who are in need of social security support are, in fact, not eligible for any elderly allowance. News reports began emerging showing that some older people became waste collectors just to earn minimal amounts of income (Hong Kong Economic Times, 2018). Some older people with financial struggles remained in the labour market as lower-skill workers on minimum wage and some involuntarily continued working after the age of 60 years old (Apple Daily, 2018b; Ming Pao, 2018). It is clear that not all older people in Hong Kong are able to freely decide on their level of participation in the labour market due to financial situation.

### **2.2.3. Health status**

Studies in Western and Asian countries both suggested that adults with suboptimal health status or chronic illnesses were more likely to be economically inactive, especially for those relying on physical labour (Alavinia & Burdorf, 2008; Do, Wu, & Chan, 2014). In fact, both objective and subjective health measures are important determinants of retirement decisions. In Hong Kong, the increased life expectancy and improved access and availability of medical technologies have made a significant difference to objective and subjective health conditions amongst older people.

Although self-perceived general health status in older people has improved, an increasing number of older people were found to be living with chronic illnesses (Census and Statistics Department, 2007; Census and Statistics Department, 2017). Back in 2007, a total of 14.3% adults aged 65 or above reported having poor health conditions and the proportion decreased to 9% in 2017. At the same time, older people with positive self-perceived health status increased from 37.6% to 40.2% from 2007 to 2017. With better self-perceived health status, older people are more likely to keep working or re-enter the labour market if they decide to do so. However, recent census data on objective health indicators suggested that the actual health status of older people in Hong Kong was relatively poorer than that identified in other countries. The percentage of older people with chronic health conditions increased from 66.6% in 2007 to 74.3% in 2017 (Census and Statistics Department, 2007; Census and Statistics Department,

2017). Since an increasing number of older people decide to remain in the labour market, one can expect that the majority of these older people are likely to be working with some level of health problems. To maintain a good health status, these older workers may need to consult their family physicians more frequently for medical examinations and follow-up visits. However, it is important to note that deterioration of health conditions does not necessarily affect one's ability and performance (capability). With suitable adjustments during employment, e.g., introducing flexible working hours to allow for medical consultations, reducing the level of physical labour work, and promoting a stress-free working environment, older people are able to continue contributing their skills and knowledge as a valuable member of the labour force. Some companies have already implemented age-friendly working conditions to support older workers to maintain productivity and good health, which are summarized in Box 2.2.

#### **2.2.4. Government policy**

The launch of the statutory minimum wage by the Hong Kong government in 2011 has encouraged older people with lower education level or limited career options to participate in the labour force. The average annual growth of employment rate among older people from year 2011 to 2016 was 11.5%, which surpassed the growth of the overall employment rate of 1.3% within the same period (Hong Kong Economy, 2017a).

Apart from the overall change in attitude and desire amongst older people to keep working for better financial status, employers are also encouraged to employ older people. The Labour Department launched the "Employment Programme for the Middle-aged" in 2003 to promote the employment of adults aged 40 or above by providing monthly on-the-job training allowance and subsidies to employers who participate in the programme. Employers who employ job seekers aged 40 or above are eligible for a monthly allowance of up to HK\$3,000 over a period of 3 to 6 months. In 2018, the programme was renamed as "Employment Programme for the Elderly and Middle-aged", extending the coverage for job seekers aged 60 or above with a monthly allowance up to HK\$4,000 for a period of 6 to 12 months (Labour Department, 2018). To further promote the employment of older people, the Labour Department started organizing the "Job Fair for Middle-aged and Elderly Employment" in 2015. This annual event provided 1,200 vacancies from 15 organizations for mature job seekers in the first year and in 2018 the number of job vacancies increased to 4,200, involving 44 organizations (GovHK, 2015; GovHK, 2018). These positive changes showed that the labour market environment in Hong Kong is evolving and employers are becoming more open to hiring older job seekers.

Employment prospects of older people are likely to be affected by policy changes within the government sector. Although there is no official retirement age, the Hong Kong government increased the retirement age of new civil servants (civilian grades) joining the respective government units on or before 1 June 2015 to 65 years of age (60 years of age for disciplined services grades). The civil servant retirement policy was updated in 2018, allowing employees who joined the workforce between June 2000 to May 2015 to have an option to extend their service duration (65 years of age for civilian grades; 60 for disciplined services grades). This government policy change not only influenced employment terms and conditions for civil servants but it set an example for the whole labour market in Hong Kong, driving towards a longer working life.

### 2.2.5. Social atmosphere

As mentioned above, the governmental initiative to extend the retirement age is a significant step in the path of acknowledging and recognizing the ability of older people to keep working and contribute to labour market growth and sustainability. It also cultivates a positive attitude and atmosphere in society towards the employment of older people. In 2018, the government proposed to further extend the retirement age of civil servants to beyond 65 years and the Hong Kong Civil Servants General Union supported this idea (Hong Kong Economic Journal, 2018). Numerous private companies and labour unions followed this trend and started to change their retirement policy terms and some even took a further step to eliminate the company retirement age (Apple Daily, 2018a; Ming Pao, 2019).

However, career prospects of older people are determined by the overall environment of the labour market. A survey on workplace age discrimination conducted by the Association of Retired Elderly Limited (ARE) in 2017 revealed that, based on responses from both employers and employees, job seekers aged 50 or above faced greater difficulties in finding jobs (Hong Kong Economic Times, 2017). Recruitment agencies indicated that companies were often reluctant to employ older people as the general retirement age in these companies ranged from 55 to 58 years. The survey also found that more than 80% of adults aged 50 or above felt they were being treated unfairly because of their age, 34% felt offended by their co-workers, and 37% did not match the application qualifications. An earlier survey conducted by the Equal Opportunities Commission also revealed that 78% respondents believed that people aged 60 or above were more likely to be discriminated in the workplace (Hong Kong Economic Times, 2016).

Age discrimination is one of the major obstacles faced by older people in the wider labour-force setting. Although retirement age is regarded as the primary attribute towards employment in later life, extending the statutory retirement age does not necessarily alleviate age discrimination in society. A recent survey found that for employees who would like to work until they turn 60 were more likely to receive a lower salary package after 55 years old while working for the same employer and holding the same title/position (Apple Daily, 2018a). However, one way to respond to the concerns over employing older people could be initiatives to cancel company retirement age cut-offs as the investment on training new employees would outweigh resources covered by the extended years of work (Ming Pao, 2019).

#### **Box 2.1 Global initiatives to combat ageism at work**

The term “ageism” refers to the stereotyping, prejudice, and discrimination against people based on their age, and the marginalizing and exclusion of older people from their own communities (World Health Organization, 2018b). Ageism plays a role in different parts throughout the life course, from employment to social services and networks, and people of all ages may experience age discrimination. Initiatives from around the world are in place to combat ageism by launching campaigns and establishing laws and policies.

Age discrimination is covered by equality or human rights laws in many countries. Policy examples include the Equality Act 2010 in the UK, the Human Rights Act 1993 in New Zealand, the Age Discrimination Act 2004 in Australia, and the Charter of Rights and Freedoms in Canada (International Age Discrimination, n.d.). Some countries established laws specifically on age discrimination in employment, such as the Age Discrimination in Employment Act of 1967 (ADEA) in the US, the Employment Measure Act 1966 in Japan and the Retirement and Re-employment Act (Chapter 274A) in Singapore. However, in Hong Kong there is no

age discrimination legislation; there only exists the Practical Guidelines for Employers on Eliminating Age Discrimination in Employment, which does not provide any legal protection. To address the negative effects of ageism and encourage the embracement of positive ageing, a campaign named “Disrupt Aging” was initiated by the American Association of Retired Persons (AARP), which aims to create a new path for people to live well as they age by creating social institutions, public policies and personal behaviours (Jenkins, 2017). The “EveryAGE Counts” scheme in Australia shares a similar vision by advocating “*a society where every person is valued, connected and respected regardless of age and health*” (EveryAGE Counts, n.d.).

Laws and campaigns help to raise social awareness, encourage acceptance and positive societal attitude towards ageing. Further actions taken by the employment market may lead to successful implementation of such legislations and schemes on a daily-life level by welcoming older people to employment or re-employment, to disregard “retirement” and, in whole, to encourage older people to contribute their wealth of skills, experiences and knowledge to the workforce and economy. Zacher, Kooij, and Beier (2018) suggested that organizational diversity strategies should include recruitment and employment of older workers as an integral part of the agenda. Age discrimination in any shape or form should be avoided, with equal rights and opportunities put forward as the priority in the labour market (Zacher, Kooij, & Beier, 2018). In South Korea, ageism is common in the workplace and people are often forced to retire before reaching the statutory retirement age of 60 years. Many companies are hesitant to hire mature job seekers. However, recent news reported that an information technology company in South Korea decided to only employ adults aged 55 or above, with an aim to improve older people’s quality of life and social welfare (ON.CC, 2017).

Similarly in Hong Kong, the social enterprise “Gingko House” employs older people who need or are interested in remaining in the labour market. The enterprise was established in 2003 and is the first of its kind in Hong Kong, striving to promote employment of older people. The nature of the business is diverse, ranging from catering, restaurants, organic farms, food manufacturing, tuck shop, music groups (bands) and employment agency services specifically for older people. Over the past 15 years since its establishment, there has been over 3,000 older persons who have been successfully employed by the enterprise (Gingko House, 2018).

### 2.2.6. Labour market environment

Due to the shortage of labour together with an increasing trend of older people to stay active in the labour market, a large number of enterprises and non-governmental organizations began providing recruitment platforms and vocational training programmes for older people approaching retirement age as well as those who have recently retired but hope to be re-employed. In 2016/2017, the Employees Retraining Board (ERB) started providing “Workplace Re-Entry” training courses to equip people aged 50 or above for re-entering the labour market (Legislative Council, 2016). Social enterprises such as Happy Retired and ARE Wisdom Social Enterprise Project continue to provide job-matching platforms and other career services for job seekers aged 45 or above. Other social enterprises such as Gingko House and Ohh-Dear also provide job opportunities to older people by introducing them to work in the agricultural, catering, modeling and service industries. Emerging human resource platform such as Retired Not Out also provides an online portal of job matching for older adults. Nevertheless, recent government statistics showed that many older people were still outside of the labour market, with nearly 80% adults aged 60 or above being economically inactive in 2017 (Census and Statistics Department, 2018d).

### Box 2.2 Designing an age-friendly workplace

An age-friendly workplace is a work environment that preserves and protects the employees' capacity to perform work tasks safely and effectively as they age (Silverstein, 2008). The concept is to design a workplace that matches employees' physical and cognitive capacities at all ages. To enhance employee's performance and better address their needs, 4 major dimensions of the age-friendly workplace blueprint have been suggested: (i) work environment; (ii) organization of work; (iii) the employee; and (iv) social support (Appannah & Biggs, 2015; Silverstein, 2008). Specifically, the work environment can be adjusted by changing rest/work schedules and minimizing repetitive motion and physical workload; ergonomics and human-factors engineering could also be applied to create a productive, comfortable, healthy and safe workspace that fully consider individual physical and physiological abilities and limitations (Oregon Occupational Safety and Health, n.d.). The organization of work involves alternative forms of work plans, vocational rehabilitation and strategies to support returning to employment. Components specific to the employees themselves include health promotion, disease prevention and management, training activities to enhance skills and competencies, and continual career development. Social support includes community-based support services, improved and equitable access to health care, equal opportunities in social welfare and protection from discrimination.



**Figure 2.2 Strategies to design an age-friendly workplace**

Source: Silverstein (2008)

#### Age-friendly workplace: projects from around the world

Companies from countries including Australia, Canada, Germany, Japan, Netherlands and the UK attempted to develop a better working environment for the ageing workforce (Ciampa & Chernesky, 2013). The positive outcomes observed were enhanced employees' productivity, improved relationships at work and

higher level of customer satisfaction. BMW launched various programmes with an aim to establish an age-friendly workplace. The company introduced nearly 70 small changes in the workplace, such as installing new magnifying glasses, introducing special shoes, using new wooden floors and purchasing equipment to encourage daily stretching and exercise (Hannon, 2013). In return, productivity of the company went up by 7%, defect rate of the assembly line dropped to 0%, and employee absence rate and reported cases of physical strain also decreased significantly (CBS News, 2010).

In Hong Kong, numerous enterprises employ older people and implement age-friendly employment initiatives. For instance, The Hongkong and Shanghai Banking Corporation Limited (HSBC) launched the “Smart Seniors” programme in the early 2010s to attract post-retirement seniors who were interested in re-employment and allowed them to regain the joy and satisfaction of working. The programme imposed no age limit and seniors received training and were assigned to work on the frontlines in different branches. HSBC employed a total of 160 post-retirement seniors up until 2015. Flexible working hours and part-time work schedules were available to senior employees to help them achieve a better work-life balance. Taking into account the physical conditions of senior employees, HSBC allowed them to take regular breaks between duty sessions (Labour Department, 2015).

The Hong Kong Disneyland Resort also provided opportunities for seniors to re-enter the workplace, with strategic plans to employ senior employees by matching suitable jobs according to employee abilities, specialties and physical conditions. Specific training to senior employees was designed and delivered by the “Disney University” to help them to further understand the culture of the company, which in turn facilitated the adaptation and adjustment to the working environment (Labour Department, 2015).

Older people are certainly capable of contributing their knowledge, skills and experiences to the labour market; for those who are highly educated, they possess strengthened cognitive competencies that allow them to work for a wide array of job types. With global changes in attitudes towards the ageing workforce and enhanced support mechanisms by government agencies and private companies, older people are able to actively remain in the labour market to keep working and thereby drive towards a positive societal change and atmosphere of the ageing workforce where challenges are transformed into opportunities.

## Chapter 3

# Education and life-long learning



## Chapter 3

# Education and life-long learning

### 3.1. Educational attainment of older people

#### 3.1.1. Importance of education for older people

Education level of older people is a vital component of successful and positive ageing, and existing research findings indicated that improved education level could lead to better health status of older people (Kye, Arenas, Teruel, & Rubalcava, 2014). High level of education attained throughout the life course are often associated with positive physical, psychological, and cognitive functions in older adults. For physical functioning, analyses indicated that a higher level of education was associated with better functional independence together with less functional decline, lower likelihood of dying, better self-rated health status, and lower incidence of chronic obstructive pulmonary disease (COPD) in older people (Elwell-Sutton, et al., 2011; Liang, Liu, & Gu, 2001). Education has also been shown to be a strong and negative predictor of functional decline and mild disability among older people (Beydoun & Popkin, 2005). For psychological measures, higher educational level was projected to lead to a downward tendency of depressive morbidity among older people (Li, Zhang, Shao, Qi, & Tian, 2014). Educational level of older people was also found to be prospectively correlated with lower levels of psychological distress (anxiety and depressive symptoms, sorrow, and loneliness) over time (Zhang, Chen, & Feng, 2015). In terms of cognitive function of older people, existing research revealed that lower level of education was associated with greater risk of dementia (Sharp & Gatz, 2011). In another analysis, older people aged over 64 years old with less than three years of education had significantly higher rates of dementia than those with higher level (more than three years) of education (Prencipe, et al., 1996).

#### 3.1.2. Educational attainment of older people in Hong Kong

The educational attainment of older people in Hong Kong is related to the historical development of society and government policies over the past decades. Between 1945 and 1949, a large number of refugees migrated to Hong Kong from mainland China, which resulted in significant population growth. The education system in Hong Kong at that time was yet to be fully developed. The refugees who moved to Hong Kong were mainly young adults from rural areas and opportunities to attain high level of education in mainland China were limited. Therefore, the overall education level of this specific cohort of the Hong Kong population, who are now entering the later life, is relatively low (Census and Statistics Department, 2018a).

Given the historical colonial background, the education system in Hong Kong is very similar to that in the UK, with six years of primary school followed by three years of lower secondary and then two years of upper secondary school. Compulsory education policy was implemented in 1971, allowing school-age children to receive six years of free education. Children were expected to enroll in primary school at the age of six. In 1978, the policy was revised and the compulsory education scheme was extended from six to nine years (Education Bureau, 2010). With the effects of the policy unfolding over the past years, there is a projected increase of older people aged 60 or above who attained primary and lower secondary-school education from the mid 2020s to the early 2030s.

The Hong Kong government works relentlessly to provide further opportunities for adults to attain education in order to meet the needs of economic growth and social development. An important milestone was the establishment of the Open University of Hong Kong (OUHK) in 1989 to introduce accessible tertiary-level education opportunities to adults, the majority of which are delivered through distance learning. The OUHK is a key provider of adult

education programmes and training activities, all of which allow members of the mature workforce to upgrade their knowledge and skills and become more adaptable to the rapid economic, social and technological transformations in Hong Kong (The Legislative Council Commission, 2007). The institution was eventually granted the status of a full university in 1997 with an expanded scope of teaching programmes. Annual reports released by the OUHK stated that more than 70,000 adult learners received higher education qualifications from the University's degree and sub-degree programmes and short courses; a total of 52 degree and sub-degree programmes were offered by OUHK during the September 1996 semester in subjects such as electronics, engineering mechanics, materials and design and environmental studies. Amongst all enrolled students in 1996, a total of 2,743 (13.4%) were aged 40 years or above (The Open University of Hong Kong, 1997).

The education level of older people has increased over the past years. From 2006 to 2016, the proportion of older people aged 65 and above who attained secondary or higher education increased from 25.0% to 39.6%; a similar trend was observed for older people with post-secondary education increasing from 6.6% to 9.5% from 2006 to 2016 (Census and Statistics Department, 2018a). The 2016 Population By-census report estimated that 42.1% of older people aged 65-69 had received some form of secondary-school education; the proportion of older people aged 85 or older with completed secondary or post-secondary education was 12.0%. Education level of older men aged 65 or over was found to be higher than that of older women (Census and Statistics Department, 2018a). A recent telephone survey titled "Report on Hong Kong Elder Quality of Life Index incorporating AgeWatch Index for Hong Kong 2017" conducted by the Centre for Quality of Life of CUHK in 2018 found that, amongst the 1,202 respondents aged above 50, 69.2% reported to have attained secondary or higher education. The relationship between education and health outcomes of older people poses as a useful topic for further research.

## 3.2. Life-long learning for older people

### 3.2.1. Benefits of life-long learning

Life-long learning is the "ongoing, voluntary and self-motivated" pursuit of personal or professional knowledge in one's life and it can occur throughout the life course. Life-long learning not only enhances personal development, social inclusion, and active citizenship but also improves self-sustainability, employability and competitiveness (Commission of the European Communities, 2006). Life-long learning can be achieved primarily through structured learning systems in schools and other education settings but it can also be attained through active participation in sports, cultural activities, hobbies, entertainment, and volunteer activities (Lenore & Weinstein, 2004).

Over the past decade, a growing body of evidence demonstrated that life-long learning is an important and integral part of physical and psychological well-being. Research findings found that participating in life-long learning was associated with a positive impact on mental health via multiple psychosocial development nodes: (i) self-esteem and self-efficacy; (ii) identity; (iii) promote general well-being; (iv) protect mental health; (v) and assist with overcoming adversity and ill health. The study concluded that participation in life-long learning could be used as a compensation strategy to help learners further develop their mental and social reserve skills (Hammond, 2004). Other studies also provided further evidence on the benefits of life-long learning in mental well-being and abilities (slower decline in memory, enhanced intellectual ability) amongst older people since continuous learning and engagement could further improve problem-solving skills and reduce dependency while keeping their minds active (Ardelt, 2000; Boulton-Lewis, Buys, & Lovie-Kitchin, 2006; Cavanaugh & Blanchard-Fields, 2006; Cohen, 2013; Dench & Regan, 2000).

### 3.2.2. Life-long learning for older people in Hong Kong

In Hong Kong, the learning programmes for older adults have been expanding (Leung, 2016); and the proportion of older people engaging in life-long learning is increasing steadily. According to a recent telephone survey titled “Report on Hong Kong Elder Quality of Life Index incorporating AgeWatch Index for Hong Kong 2017” conducted by the Centre for Quality of Life of CUHK, the proportion of older people enrolled in regular education or training (courses, seminars, conferences, private lessons or instructions) increased from 21.7% in 2017 to 24% in 2018 (The CUHK Jockey Club Institute of Ageing, 2020).

There are currently two major initiatives by the Hong Kong government to promote life-long learning, namely the Elder Academy and Continuing Education Fund (CEF) with different objectives and mode of operation as described below.

#### Elder Academy

Learning programmes for older adults first emerged in the late 1980s and were mainly delivered by elderly care centres and social service organizations. Topics and contents of these learning programmes ranged from basic computer usage for the elderly, elementary English, Chinese calligraphy, water and ink painting, dancing and Tai Chi; the majority of the learning programmes aimed at personal development and thus comprised non-credit-bearing modules (Tam, 2012). Since the establishment of the Elderly Commission in 1997, the government has taken on a more coordinated approach to elderly policy development with the Elderly Commission tasked with advising on policy directions and programme scopes that are directly relevant to tackling challenges associated with population ageing. The government considers that participation in life-long learning by older people is essential for successful, active ageing and such form of social participation is beneficial to health status and abilities to cope with the evolving challenges of population ageing (The Elderly Commission of Hong Kong, 2001). Both the Labour and Welfare Bureau and the Elderly Commission launched the school-based “Elder Academy” in 2007. The Elder Academy aims to promote life-long learning, maintain physical and mental well-being, foster sense of worthiness, and promote harmony between elders and the younger generations. The Elder Academy mainly targets people aged 60 or above and offers a wide range of teaching activities in the forms of academic courses, interest classes and healthcare-related programmes. As of July 2019, there are approximately 140 Elder Academy sites in Hong Kong and more than 10,000 learning vacancies are available each year (The Legislative Council Commission, 2019).

#### Box 3.1 Country example of life-long learning: Singapore

Life-long learning in Singapore is a key economic driver to enhance the competitiveness of Singapore and is viewed as an antidote to the unemployment problem (Prem, 2004). Singapore released a new policy initiative called “SkillsFuture” in 2015, and introduced the concept of life-long learning to the mainstream policy framework (Sung & Freebody, 2017). SkillsFuture is a national movement and it provide Singaporeans with the opportunity to maximize their potentials throughout their life course regardless of their learning starting points and education levels (SkillsFuture Singapore Agency, 2015).

This movement has four key thrusts: (i) help individuals to make well-informed choices in education, training and careers; (ii) develop an integrated high-quality system of education and training that responds to constantly evolving needs; (iii) promote employer recognition and career development based on skills and mastery; (iv) foster a culture that supports and celebrates life-long learning. Through this movement, each individual’s skills, enthusiasm and contribution are considered as drivers towards the next stage of country

development into both an advanced economy and an inclusive society (SkillsFuture Singapore Agency, 2015).

In 2018, about 465,000 Singaporeans and 12,000 enterprises received some form of training subsidies through SkillsFuture. The movement includes 25 skills frameworks, such as accountancy, early childhood care and education, media, retail, and it has delivered over 100 “Earn and Learn” programmes across 35 sectors, with more than 3,500 participants (SkillsFuture Singapore Agency, 2019).

### Continuing Education Fund

Established in June 2002, the Hong Kong government established the Continuing Education Fund (CEF) to encourage the pursue of continuing education by providing subsidies for learning and training activities, with a national view to facilitate smooth transition to a knowledge-based economy as well as successful adaptation to a globalized economy (The Legislative Council Commission, 2018). The upper age limit of applicants for CEF was originally set at 60 years old; from 1 September 2007, the age cut-off went up from 60 to 65 years old, allowing more local citizens to apply for funding to support their pursue of continuing education, since a significant number of people in the age group of 60 to 65 are still active in the labour force.

In a bid to seek approval of additional funds for CEF from the Legislative Council with a view to promote active ageing, the Hong Kong government proposed to further increase the upper age limit for applicants from 65 to 70 years. The rationale of this eligibility adjustment was to be in line with the territory-wide policy objectives to establish an age-friendly environment for all in Hong Kong, to promote successful, positive ageing and to explore and utilize the valuable pool of elderly persons as labour resources (as highlighted in the 2015 Report of “Population Policy – Strategies and Initiatives”), and to encourage older people to live to their full potential with active lifestyle and social and economic empowerment (as recommended in the Elderly Services Programme Plan) (The Legislative Council Commission, 2018). This adjustment of age cut-off for CEF, which is projected to cover subsidies for additional 390,000 persons, was successfully implemented in 2019. The committee of CEF has since received a total of 632,681 applications with a total amount of HK\$4.397 billion to be reimbursed. The majority of the selected training courses in the applications fell under the sectors of financial services (31%), business services (27%) and foreign languages (17%).

### Other life-long learning initiatives

Currently, many non-governmental organizations (NGOs) funded by the Social Welfare Department offer various types of learning activities for older people in different districts across Hong Kong. To cater for different needs of older people, NGOs and social organizations are currently providing a wide array of learning activities to older adults under a self-financing model. For instance, the Evangelical Lutheran Church of Hong Kong has set up a social enterprise called Essence Hub, aimed to enrich the lives of the golden-aged (people over 50 or above) population and the community as a whole by introducing a healthier, quality and meaningful lifestyle (Essence Hub, n.d.). Courses (chargeable with fees) range from physical exercise, cooking, retirement planning, art and design, and photography. Happy Retired is a social organization working to empower older people to lead and organize activities (Yeung, 2018). In addition, the continuing education unit of some universities provide short courses dedicated to senior citizens or provide financial incentives to them to promote lifelong learning.

### **Box 3.2 The University of the Third Age (U3A)**

The University of the Third Age (U3A) is an international movement, serving a purpose of educating and encouraging older people to continue learning, to share their knowledge, skills and interests in an age-friendly environment (The World Senior Tourism Congress, 2018; Age UK Group, 2018). U3A is located in different continents and operated by different organizations, and this global network provides learning and development courses to approximately 10 million older people worldwide (The World Senior Tourism Congress, 2018). Under the U3A movement, older people have the opportunity to meet new friends with the same interests or lifestyles, and they can also learn specific skills of interests and openly share their knowledge and skills with others in a supportive and structured environment (Age UK Group, 2018).

U3A was founded in 1973 by the Toulouse University of Social Sciences in France, which aims to provide education programmes for older people in order to improve their quality of life. The original French model required U3A to be associated with a traditional university system (Swindell & Thompson, 1995); in the 1980s, the UK model separated from the original French model and transformed into a self-help system, which means that all teaching and management activities are coordinated by volunteers with little or no support from external sources. The various activities were operated as free events or as low-cost events in local community centres (Swindell, 2002). To date, U3A from around the world has further evolved into different approaches and modalities of education for older people that are fit for purpose within the local contexts (Swindell & Thompson, 1995).

The U3A Network of Hong Kong (U3A HK) was established in 2006. It is funded by the HK Electric Centenary Trust and administered by the Hong Kong Council of Social Service (HKCSS) (The U3A Network of Hong Kong, 2008; HK Electric Investments, 2019). U3A HK serves as a knowledge-sharing hub where members can exchange skills such as accounting and project management to assist them to effectively manage their own learning centres; diverse learning contents and exchange activities introduced by U3A HK include “The Seminar on Learning for the Third Age”, “Guangzhou Lingnan University of Elderly Exchange Group” and “Leadership Skill Workshops” etc. (The U3A Network of Hong Kong, 2008).

According to an assessment report of social impact conducted by CSR Asia for U3A HK, a total of 98% of the survey respondents indicated that U3A HK provided a viable learning and social platform for members to stay active in their own communities. Furthermore, 75% of respondents indicated that they became more confident in sharing their opinions with others, which led to enhanced self-confidence and self-esteem (HK Electric Investments, 2019).

## Chapter 4

# Use of information and communication technology



## Chapter 4

# Use of information and communication technology

### 4.1. Potential benefits of ICT for older people

In the current era of population ageing, there is an urgent need to identify opportunities to improve and maintain quality of life amongst older people. Various types of information and communication technology (ICT) are designed to assist older people with different needs and capabilities, to promote older people's physical and cognitive functioning, and improve their overall well-being and quality of life. In terms of better physical functioning, various emergency assistive systems and detection systems are available to assess a person's risk of falling and to deliver effective interventions for preventing falls (Gschwind, et al., 2017). The availability of ICT may also play a role in improving the psychological well-being of older people. For example, the use of online communication platforms and video-enabled telephones has been associated with reduced social isolation and depression (Hensel, Parker-Oliver, & Demiris, 2007). Companion robots are designed to provide companionship to older people who live alone, to stimulate the interaction between healthcare professionals/carers and older people (Liang, et al., 2017), or to alleviate symptoms of dementia (Moyle, et al., 2017). Multimedia programmes with personalized digital materials and video games aiming to reduce anxiety and depression symptoms of dementia patients have also been developed (Davison, et al., 2016; Yu, et al., 2015). To prevent cognitive decline, various ICT-based systems have been developed for neuro-cognitive training (Optale, et al., 2010). Recently, the WHO acknowledged the potential of ICTs (e.g., eHealth, mHealth) in improving global public health (World Health Organization, 2018a). A digital application to support the implementation of integrated care for older people has been designed by the WHO to guide health and social care workers through a step-by-step process of screening older people at risk of care dependency in the community, undertaking a person-centred assessment of health and social care needs, and designing a personalized care plan (<https://www.who.int/ageing/health-systems/icope/en>). This electronic application can also be used by government agencies and relevant organizations as a training tool for health and social care workers to deliver personalized, integrated care for older people. Similarly, several interactive internet interventions have also been developed to optimize self-management of chronic physical health conditions (Morton, et al., 2017; Richard, et al., 2016).

### 4.2. Projects and studies on ICT in Hong Kong

Various types of ICT such as smart home technology and digital platform for integrated care are being or have been developed as a supporting tool for successful ageing. Examples from the Jockey Club Smart Ageing Hub and the Jockey Club Community eHealth Care Project are discussed below.

#### The Jockey Club Smart Ageing Hub

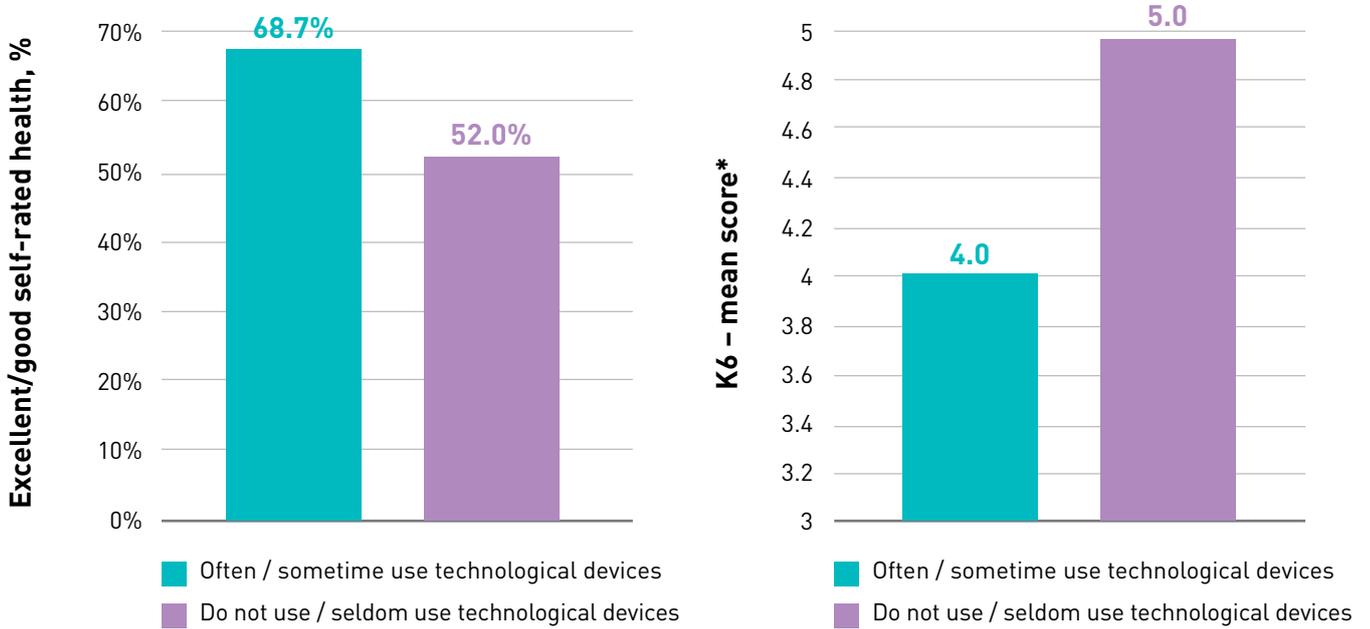
Funded by The Hong Kong Jockey Club Charities Trust, a five-year project to establish "The Jockey Club Smart Ageing Hub" was initiated in 2017 to promote the application of gerontechnology to enhance quality of life of older people (The Hong Kong Polytechnic University, 2017). The main objectives of the project are: (i) to increase public awareness about the role of gerontechnology in healthy, active ageing through a platform for both individual and the society, as well to support older people as well as older people with disabilities to receive better care at home and in the community; (ii) to provide opportunities of interaction among stakeholders (e.g., older people, older people

with disabilities, their family members and caregivers, researchers, residential care service providers) to adopt and apply new technologies to improve quality of life in older people and older people with disabilities; (iii) to facilitate developer-user knowledge exchange in order to improve the quality and contribute to further ideas on innovative technological products (The Hong Kong Polytechnic University, 2017). Current gerontechnological products cover various aspects of the older people's life course, such as dressing and grooming, health management, home and living, kitchen and dining, leisure, mobility, hygiene and safety, and personal assistive devices (The Hong Kong Polytechnic University, 2018)

### **The Jockey Club Community eHealth Care Project**

The Hong Kong Jockey Club Charities Trust launched the three-year "Jockey Club Community eHealth Care Project" in collaboration with the Senior Citizen Home Safety Association (SCHSA), the CUHK Jockey Club Institute of Ageing (IoA) and various NGOs. The project aims to: (i) encourage older people to develop self-management skills and to better understand their own health conditions; and (ii) to promote elderly care centres as the first point of contact for assessing and addressing health and social needs of older people. An integrated care model for older people with complex health and social care needs is in place with support from ICT services (e.g., electronic screening for geriatric syndromes, blood pressure self-measurement stations). Between 2016 and 2019, over 10,000 people aged 60 and above have participated in the project. After a duration of 12 months, over 40% of participants observed a reduction of systolic blood pressure (by  $\geq 10$  mmHg) or diastolic blood pressure (by  $\geq 5$  mmHg); the proportions of participants with poor self-rated health or poor subjective well-being were reduced by 18% and 33%, respectively. In addition, study findings demonstrated that the integrated health and social care model successfully reduced the level of frailty in pre-frail and frail community-dwelling older people. Compared with control participants, older people who received integrated eHealth care including computer-assisted in-depth assessment, personalized care planning, self-management support and coordinated follow-up care were 1.6 times more likely to observe a reduction of frailty. The integrated care model also supported social care providers to deliver services based on older people's needs and targeted services towards community-based care, which would seem sustainable in the long term since such care services are delivered primarily through a coordinated use of existing resources and practices in the communities.

Findings from other local studies demonstrated the positive effects of ICT services on health and well-being of older people in Hong Kong. A recent telephone survey conducted by the IoA found that older people who reported "often" or "sometime" use technological devices (smartphone or computer) were more likely to rate their health status as excellent or good and they were assessed to be less psychologically distressed (as measured by the Kessler Screening Scale for Psychological Distress (K6)) compared to older adults who reported "do not use" or "seldom use" technological devices (Figure 4.1).



\*Higher K6 score indicates higher level of psychological distress

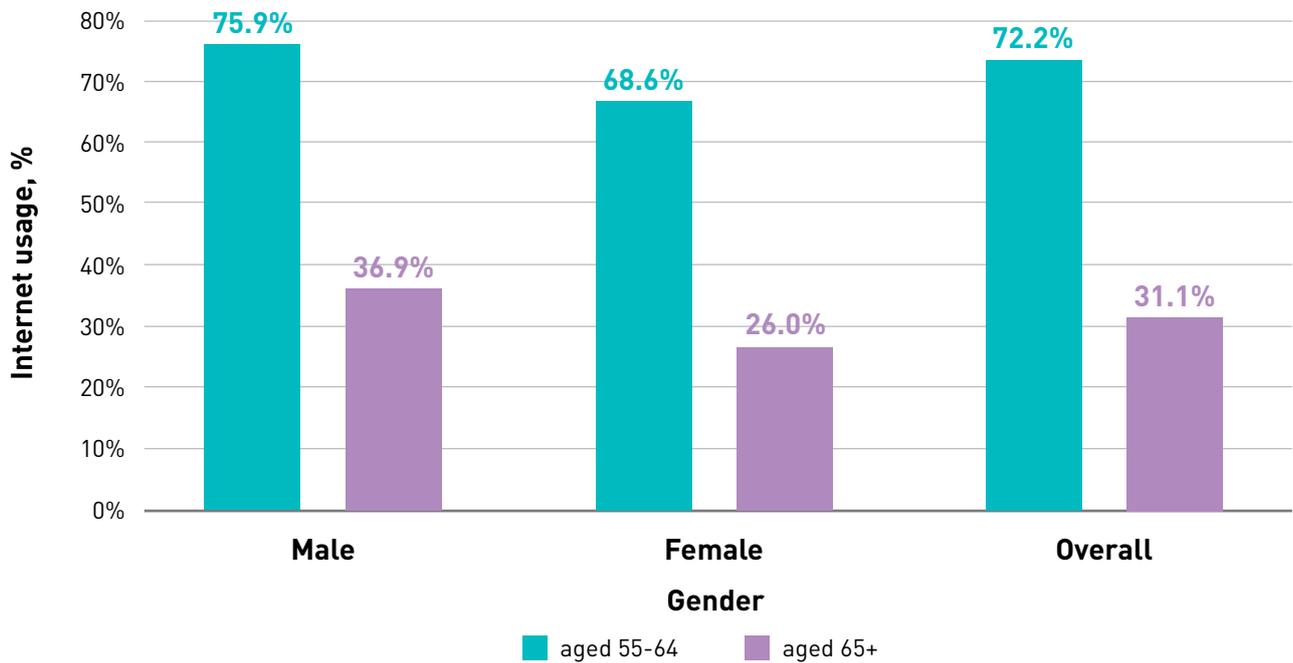
**Figure 4.1 The relationship between ICT use, self-rated health, and psychological well-being”**

Source: The CUHK Jockey Club Institute of Ageing (2020)

A study by Fang and colleagues reported that the use of internet and smart technological devices such as smartphones and tablets by older people aged 75 and over could facilitate their regular interactions with their family members, which might potentially enhance their psychological well-being. The study concluded that older people were in fact not falling behind in the current age of digital connectivity and findings indicated that they were able to embrace and use ICT services to enhance their ageing experience (Fang, Chau, Wong, Fung, & Woo, 2018).

### 4.3 Use of ICT by older adults in Hong Kong

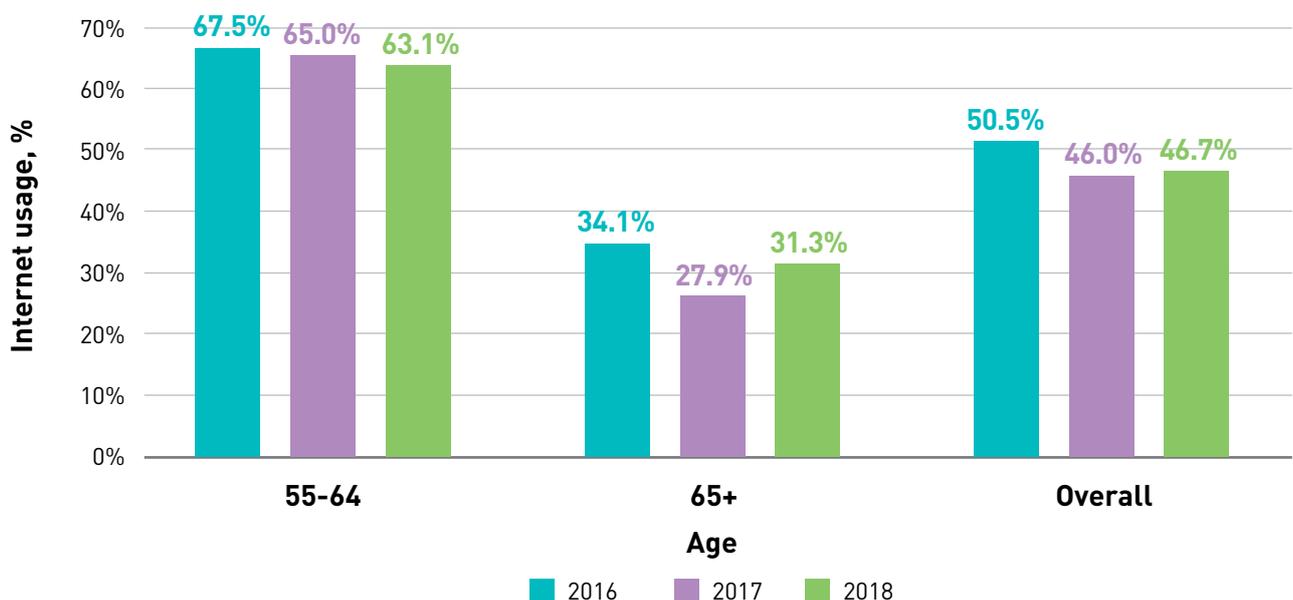
To better understand the trend of personal computer and internet use, the Census and Statistics Department has been regularly conducting territory-wide surveys since 2000. According to the recent statistics, internet use by older people aged 65 and over has increased significantly from 7% in 2008 to 51.2% in 2018 (Census and Statistics Department, 2008a; Census and Statistics Department, 2018c). However, it was shown that internet usage decreased with age. In 2017, 72.2% of people aged 55 to 64 had used the internet; usage fell to 31.1% among those aged 65 and over. Internet use was also found to be different between males (aged 55 to 64, 75.9%; aged 65 and over, 36.9%) and females (aged 55 to 64, 68.6%; aged 65 and over, 26.0%) (Census and Statistics Department, 2018c) (Figure 4.2).



**Figure 4.2 Survey of ICT (internet) use by gender, 2017**

Source: Census and Statistics Department (2018c)

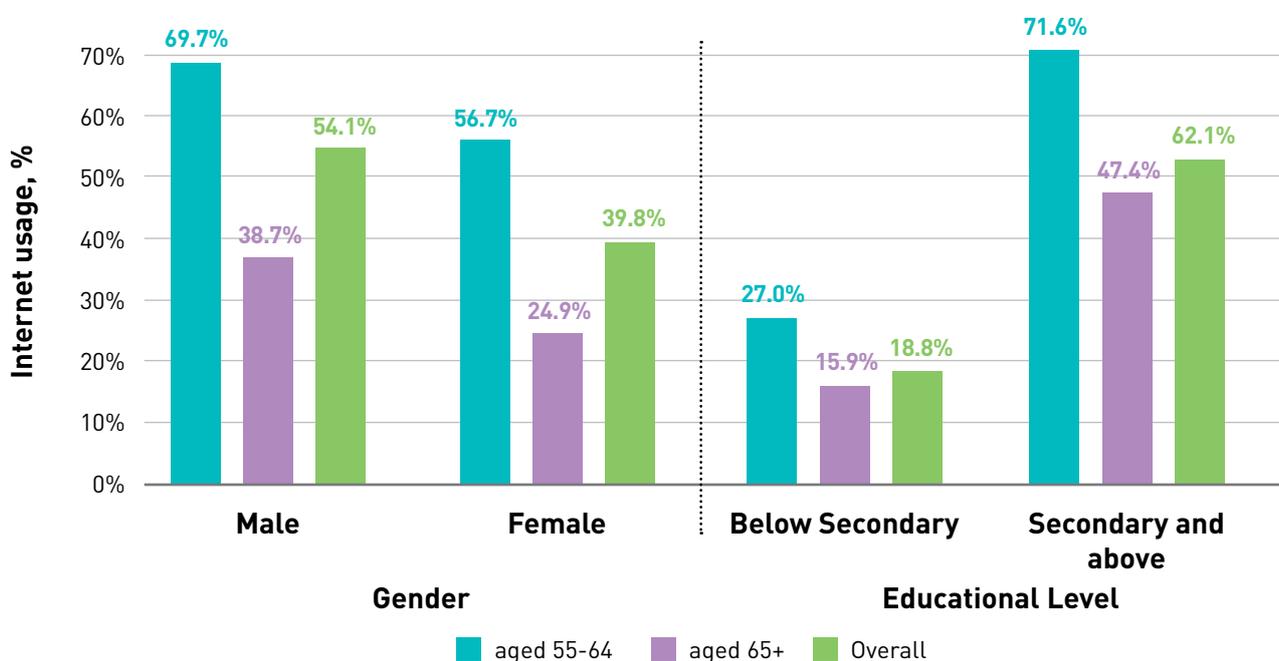
Since 2016, the CUHK Jockey Club Institute of Ageing (IoA) began collecting data for internet access and smartphone use. Analysis indicated that internet access rates among people aged 65 and over decreased from 34.1% in 2016 to 27.9% in 2017 and then increased to 31.3% in 2018. On the other hand, the data also showed that ICT use decreased with age, consistent with the trends observed for ICT use from the Census and Statistics Department. According to the survey data collected by IOA, the rate of internet use was 63.1% in people aged 55 to 64; by contrast, internet usage fell to 31.3% among those aged 65 and over in 2018 (Figure 4.3).



**Figure 4.3 Survey of ICT (internet) use by age group, 2016-2018**

Source: The CUHK Jockey Club Institute of Ageing (2020)

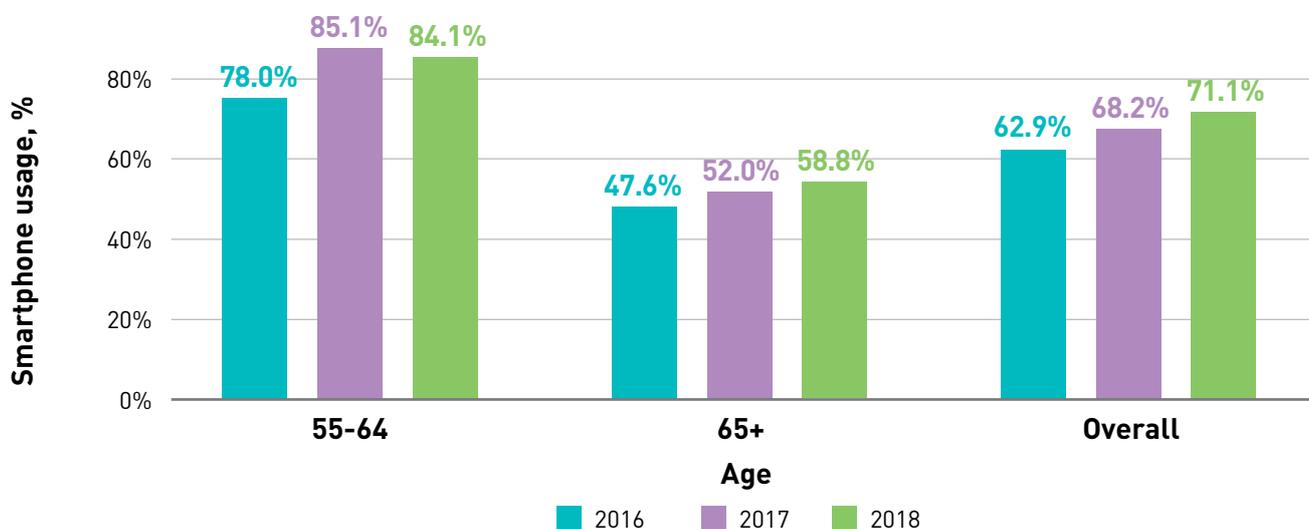
Further analyses of data in 2018 revealed that internet usage was higher among males (54.1%) than females (39.8%); this gender-sensitive difference was consistently observed in the two age subgroups (aged 55 to 64, males 69.7%, females 56.7%; aged 65 or over, males 38.7%, females 24.9%). Education status was also found to be a contributory factor. Well-educated older people were more likely to access the internet as compared to older people of lower education levels. In 2018, internet usage was more common in people aged 55 to 64 who reported to have attained secondary education; a much lower rate of 27.0% was observed amongst people of the same age group who received lower level of education (below secondary). A similar trend was found for older people aged 65 and over, where a higher level of internet use was reported amongst those who attained secondary education (47.4%) compared to those who were less-educated (primary education or lower, 15.9%) (Figure 4.4).



**Figure 4.4 Survey of ICT (internet) use by gender and educational level, 2018**

Source: The CUHK Jockey Club Institute of Ageing (2020)

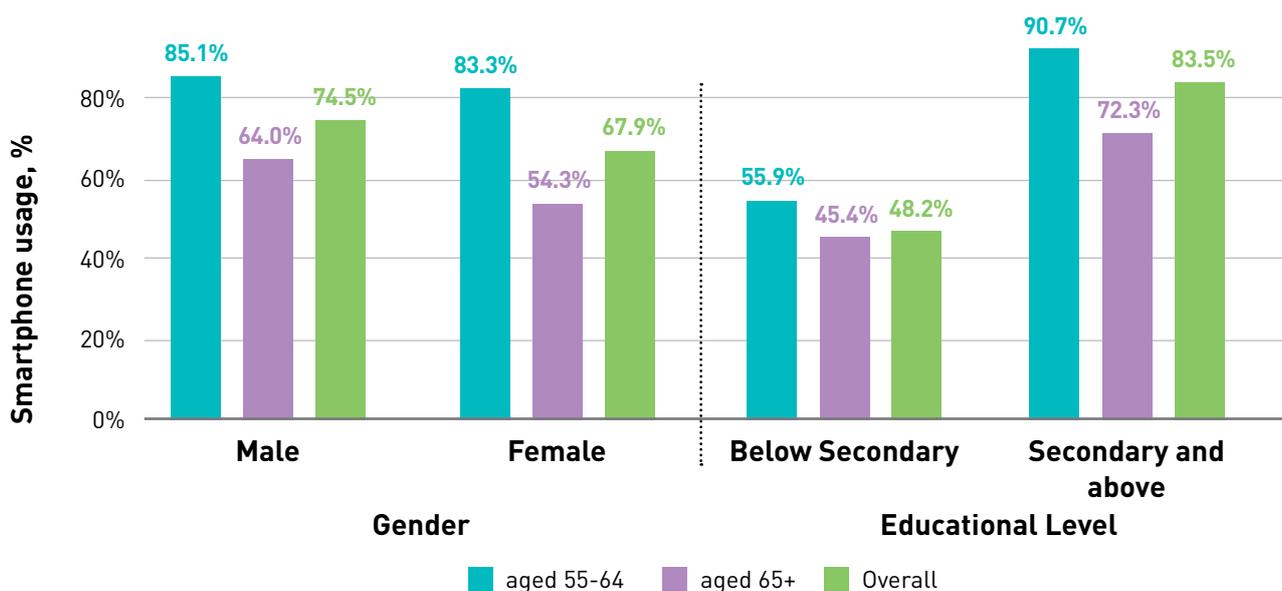
Regarding smartphone use, findings demonstrated that it was getting increasingly popular for people aged 55 and above to use smartphones over the past few years. In 2018, over half (58.8%) of people aged 65 and over reported as being smartphone users, which was a rather moderate increase as compared to usage in 2016 (47.6%). Similar to the age-sensitive trend observed for internet access, the use of smartphones declined as people got older. Figures from year 2016 revealed that higher smartphone usage was observed in the 55-64 age group (78.0%) than in the age group of 65 years and above (47.6%) and the age-sensitive decline remained consistent over the subsequent years (Figure 4.5).



**Figure 4.5 Survey of ICT (smartphone) use by age group, 2016-2018**

Source: The CUHK Jockey Club Institute of Ageing (2020)

Subgroup analysis by gender indicated that the rates of smartphone usage were higher in males than females. In 2018, among those aged 55 to 64, a slightly higher rate of smartphone use was reported in males (85.1%) than females (83.3%). This gender-based difference remained consistent in the older-age group of 65 years and above. Educational levels were also found to play a part in smartphone usage. Overall, a higher usage rate (83.5%) was observed amongst higher-educated people (having attained secondary education or above) as compared to people who attained lower levels of education (primary and below, 48.2%) (Figure 4.6).



**Figure 4.6 Survey of ICT (smartphone) use gender and educational level, 2018**

Source: The CUHK Jockey Club Institute of Ageing (2020)

## 4.4 ICT programmes for older adults

To encourage application and usage of ICT systems, the Government of Hong Kong provided substantial amounts of funding to various NGOs in 2012 with an aim to organize dynamic activities for older people to nurture and enhance their abilities as well as interests in using ICT. According to the Office of the Government Chief Information Officer (OGCIO), three rounds of “ICT Outreach Programme for the Elderly” were launched from 2014 to 2018 to provide financial support to NGOs for delivering teaching programmes to over 5,500 senior citizens in using tablets and other mobile devices, with an aim to help older people to better embrace digital technologies in their daily activities for a better quality of life (Office of the Government Chief Information Officer, 2019).

Other related initiatives to promote the use of ICTs by older people include: (i) “Funding Scheme for Digital Inclusion Mobile Apps” by OGCIO since 2012 to support NGOs for developing mobile applications tailored to the needs of the elderly as well as other special target groups; (ii) the Elder Academy and its ICT-relevant courses; the “Capacity Building Mileage Programme” organized by the Women’s Commission; and the “Improvement Programme of Elderly Centres” by Social Welfare Department, which introduced advanced ICT-related equipment and facilities to 237 elderly centres (Labour and Welfare Bureau, 2016).

## 4.5 Potential drawbacks of ICTs

Although the availability of ICT systems has a relatively positive impact towards active ageing, older people with physical and cognitive difficulties (e.g., deteriorated eyesight, memory loss) and those of lower socioeconomic status could be disadvantaged in accessing these innovative products, and such inequity could eventually lead to social exclusion and isolation. Existing evidence suggested that the precise impact of the digital age and widespread use of the internet on older people is rather complex, with some studies showing an overall improvement in quality of life/well-being in older ICT users while other studies found little or no improvement and some even observed an increased risk of social isolation (Osvath, et al., 2018). It is clear that future ICT devices should be designed with a “user-orientated” vision with better, more transparent accessibility for older people. To effectively facilitate active, healthy ageing, further qualitative evidence on older people’s perceptions and preferences on ICT products is warranted.

## Chapter 5

# Social and civic participations



## Chapter 5

# Social and civic participations

### 5.1. Social participation of older people

#### 5.1.1. Benefits of social participation

Social participation is broadly defined as a person's participation in recreation, socialization, and activities in a variety of cultural, educational and spiritual settings (World Health Organization, 2007), and it is an important aspect in later life. A large body of evidence demonstrated the values and benefits of social participation for older people, including enhanced psychosocial well-being (Litwin, 2011), improved quality of life (Levasseur, Desrosiers, & Noreau, 2004; Cachadinha, Costa Branco De Oliveira Pedro, & Carmo Fialho, 2011), and decreased risk of disability, cognitive decline, and dementia (Rubio, Lazaro, & Sanchez-Sanchez, 2009; Hughes & Ganguli, 2009; James, Boyle, Buchman, & Bennett, 2011; James, Wilson, Barnes, & Bennett, 2011). The impact of social relationships on the risk of mortality has been demonstrated to be comparable to that of the established risk factors such as smoking, physical inactivity, and obesity. A study by Holt-Lunstad et al. showed that individuals with adequate social relationships were 50% more likely to survive than those with poor or inadequate social relationships (Holt-Lunstad, Smith, & Layton, 2010). Social participation of older people has also been shown to generate societal benefits by contributing to neighborhood associations or community-based NGOs (World Health Organization, 2007). Thus, social participation is regarded as a key determinant of healthy ageing and is one of the recognized domains for building age-friendly cities (World Health Organization, 2014).

#### 5.1.2 Volunteering activities

Volunteering is a form of social participation. It refers to an activity that is unpaid and voluntary, and it requires personal time to help either NGOs or individuals who are unrelated (Voluntary Action Rotherham, 2013), for example, senior volunteer teachers of learning courses /programmes for older adults (Leung, 2016). Additionally, many NGOs and elderly centres have established elderly volunteer teams to encourage older people to participate in volunteer activities and services and as a result, the participating older people can further develop their strengths in communication and social skills, strengthen their bonds with the community, and avoid social isolation (Hughes & Ganguli, 2009). Participation in voluntary work has been shown to lead to reduced mortality rate and improved physical, cognitive and mental well-being including depressive symptoms, life satisfaction, self-rated health and self-esteem (Anderson, et al., 2014). Apart from benefits to health, volunteering also brings significant economic value to families, communities, and society (Morrow-Howell, Wang, & Amano, 2019).

#### 5.1.3. Social participation opportunities for older people

The CUHK Jockey Club Institute of Ageing conducted a survey on quality of life of the elderly in 2018 and found that 157 (13%) respondents aged 50 or above had participated in some form of volunteer services, indicating a small increase (0.8%) in social participation as compared to the previous year (The CUHK Jockey Club Institute of Ageing, 2020).

There are various social participation and volunteering opportunities currently coordinated by the Hong Kong government and NGOs. Selected examples are discussed below.

## The Social Welfare Department

The Social Welfare Department (SWD) of Hong Kong provides community support services for older people via elderly centres, namely District Elderly Community Centres, Neighbourhood Elderly Centres, and Social Centres for Elderly. These elderly centres serve as popular venues for social participation and networking, as reflected by a steady increase in the number of memberships from 188,258 in 2008 to 222,431 in 2018 (Census and Statistics Department, 2018b). Moreover, these centres regularly organize educational, developmental, social and recreational activities for older people (usually aged 60 or above) and volunteer opportunities often arise from these events.

Participation in community support services as volunteers not only provides opportunities to socialize with others and build/expand social networks but it also promotes participation in community affairs and improve overall well-being and mutual support amongst older people through constructive use of leisure time (The Social Welfare Department, 2019b). Currently, there are 211 elderly centres, including 41 District Elderly Community Centres, 169 Neighbourhood Elderly Centres, and 1 Social Centre for Elderly in Hong Kong (The Social Welfare Department, 2018b).

The SWD is responsible for the “Opportunities for the Elderly Project” (OEP). Established in 1998-1999, the OEP aims to subsidize social service organizations, district groups and councils and educational institutions for organizing activities for older people, such as promoting life-long learning, community participation, inter-generational solidarity and volunteerism. The OEP provides opportunities for older people to realize their potentials, foster/enhance a sense of worthiness, experience the spirit of care in the community, and recognize their contributions and values to society (The Social Welfare Department, 2019c). For the year 2015/16 and year 2016/17, OEP launched a total of 540 projects through various organizations and attracted more than 167,600 elderly participants (The Social Welfare Department, 2019d).

On the volunteering front, SWD has been actively promoting the territory-wide “Volunteer Movement” since 1998. The aim of this project is to encourage groups and individuals from different sectors to proactively participate in volunteering activities, thereby creating a more caring and supportive society (The Social Welfare Department, 2019a). The “Support Teams for the Elderly” (STEs) have also been established by District Elderly Community Centres. The STEs not only provide a support network to assist older people to lead an active life in the community but they have also developed the “Senior Volunteer Programme” to encourage older people to take part in social events and voluntary services, so as to promote a sense of worthiness (The Social Welfare Department, 2007). As of September 2018, there are a total of 41 STEs across all districts in Hong Kong (The Social Welfare Department, 2018a).

## Agency for Volunteer Service

The Agency for Volunteer Service (AVS) aims to promote sustainable volunteerism and to build a civilized and caring community. The AVS provides training for elderly volunteers to enhance their leadership skills and civic awareness (Agency for Volunteer Service, 2014). Back in 1970, the AVS established a volunteer group named “Hong Kong Community Volunteers” (HKCV) and people aged 15 or above who were interested in volunteering could join as members. In the year 2017/18, there was a total of 5,813 HKCV members; 1,256 (21%) of these members were aged 55 or above and 722 (12%) were retirees (Agency for Volunteer Service, 2019). In 2003, the AVS established the Volunteer Training and Development Centre (TDC) to assure and enhance quality of volunteer services offered by its members. In the year 2017/18, the TDC delivered 322 training programmes and activities, involving a total of

24,660 participants. For the development of voluntary work for older people, the AVS has partnered with various service providers to design and deliver training activities for senior volunteers to encourage them to proactively seek volunteering opportunities, to improve their leadership skills, and to encourage an active, fulfilling lifestyle (Agency for Volunteer Service, 2019).

### Hong Kong Red Cross

The Hong Kong Red Cross established the “Elderly Volunteers Detachment” (Elderly Unit) in 1992 and recruits people aged 50 or above to assist with the disadvantaged groups in the community, with a goal to deliver the message of care and promote the spirit of humanitarianism and volunteerism (Hong Kong Red Cross, 2019a). As of December 2017, there were 31 Elderly Units with over 730 members in Hong Kong.

The Hong Kong Red Cross regularly organizes volunteer training courses, lectures and educational activities such as health training courses and first aid talks for senior volunteers (Hong Kong Red Cross, 2019b). In 2016, the Elderly Unit organized the first leadership training course to enhance communication and public speaking skills (Hong Kong Red Cross, 2017). Two exchange tours to visit Taiwan (Kaohsiung) and mainland China (Nanjing), each involving around 40 members, were organized and participants were given the opportunity to share their volunteering experiences with Red Cross volunteers from the other countries (Hong Kong Red Cross, 2018).

### Elder Academy

Under the Elder Academy, older people are encouraged to join the elderly volunteer team, which aims to foster awareness of civic and community participation (Elder Academy, 2010). The New Territories West Elder Academies Cluster established an elderly volunteer team in 2014, which provides comprehensive leadership training courses to senior volunteers to discover their talents in volunteering as well as improve the effectiveness of their volunteering services (NT West Elder Academies Cluster, 2018). The cluster has over 100 volunteer members, contributing to a total of 2,598 service hours and over 2,500 people have benefited from their services in the past three years.

The Elder Academy at Lingnan University also develops elderly voluntary work programmes and it strives to expand the community care network of older people. Elderly volunteers serve as tutors for course on Chinese culture and other traditional cultural knowledge such as Tai Chi, Chinese calligraphy, dumpling-making activities (Lingnan University, 2013).

## 5.2. Civic participation

### 5.2.1. Importance of civic participation to older people

Civic participation in older people is a crucial motivational component of active and successful ageing (World Health Organization, 2002a; European Commission, 2012). The term “Civic participation” refers to individual and group activities designed to address issues of public concern (American Psychological Association, 2002), and these activities may include participation in voting, political campaigns, paid and unpaid community work, keeping abreast of news and public affairs, and helping with neighbors (Martinson & Minkler, 2006). Previous studies have collectively demonstrated the value of civic participation in improving quality of life (James, Nancy, & Philip, 2007; Gonzales, Matz-Costa, & Morrow-Howell, 2015). High levels of civic participation among community-dwelling older adults were found to be

associated with lower levels of psychological distress (World Health Organization, 2002a) and loneliness (Proulx, Curl, & Ermer, 2018), with greater happiness and satisfaction with life (Anderson, et al., 2014), higher self-rated health (Batista & Cruz-Ledón, 2013), better physical functioning (Morrow-Howell, Wang, & Amano, 2019), and lower risks of disability and mortality (Anderson, et al., 2014). Civic participation was also found to promote social equity and justice (Chan & Cao, 2015). Older people participating in civic activities could be better integrated in society and civic participation might help them to maintain a level of community involvement and awareness (World Health Organization, 2002b). As a result, civic participation has been proposed as the gold standard for active and productive ageing (Serrat, Scharf, Villar, & Gómez, 2019), and it has become an important topic for social policy development (Torres & Serrat, 2019).

### **5.2.2. Civic participation of older people in Hong Kong**

The number of older people participating in civic activities, such as community engagement to influence decision-making at local organizations, has increased over the years. The CUHK Jockey Club Institute of Ageing (IoA) recently conducted a telephone survey on the quality of life of older people, and found that 33.7% of people aged 50 or above had participated in some form of civic activities; among them, 94.1% had taken part in events organized by their local organizations, and 21.3% had expressed their views and participated in civic decision-making process. For the latter, this was an increase of 6.3% as compared to the participation rate from the previous year (15.1%). In addition, the survey found that civic participation in older people was associated with better self-rated health status and improved social connections, where as many as 70% of the respondents indicated that they were in good health and 83.8% reported that they had strong social connections (The CUHK Jockey Club Institute of Ageing, 2020).

Recent voter registration statistics showed that older people are now a vital group of active voters, contributing to an increasing number of votes for the District Councils. For the 2015 election, there were approximately 1.62 million registered electors aged 50 and above. This constituted to 52% of all registered electors and was a substantial (18.6%) increase as compared to the 2011 District Council election. Similarly, for the 2016 Legislative Council election, approximately 1.97 million (52%) registered electors were in the age group of 50 years old and above and represented an increase of 17.1% as compared to the 2012 election. The voter turnout rates of elderly registered electors were 27.9% between the 2011 and 2015 District Council elections and 24.1% between the 2012 and 2016 Legislative Council elections (Voter Registration, 2019; Census and Statistics Department, 2019).

### **5.2.3. Strategies to promote civic participation**

A number of government agencies and NGOs, including the Older People's Association (OPA), have been promoting civic participation among older people for years. For example, the American Association of Retired Persons (AARP), with nearly 38 million members, provides a platform for older people to share their knowledge and resources and helps older people to exercise their rights to choose their desired lifestyle and achieve their personal goals, thereby living a healthy life under stable financial conditions with opportunities to further self-development (American Association of Retired Persons, 2017).

Various initiatives to promote civic participation have been successfully implemented. In this report, the Jockey Club Age-friendly City Project and Network of Ageing Well for All are selected as examples.

### Age-friendly city projects

In 2008, the Hong Kong Council of Social Service launched the “Age-Friendly Cities Project” and established working groups with the District Council and Elderly Service Centre in each district (The Hong Kong Council of Social Service, 2013). In 2015, The Hong Kong Jockey Club initiated the “Jockey Club Age-friendly City Project” and partnered with four gerontology research organizations of local universities, District Councils and NGOs to promote the “age-friendly city” concept and implement relevant district-based programmes, offering various activities for older people to encourage civic participation in their communities (Jockey Club Age-friendly City Project, 2019a). In 2019, the project funded 3 civic-participation-related programmes involving a total of 2,326 older persons (Jockey Club Age-friendly City Project, 2019b).

### Network of Ageing Well for All

The Network of Ageing Well for All (NAWA) is established by the CUHK Jockey Club Institute of Ageing to promote the participation of the elderly which is conducive to transform Hong Kong into a world-class age-friendly city. As a platform for older people to drive for social impact in order to improve their communities and share their opinions, NAWA aims to empower the elderly with a strong voice to discuss about their needs and to help them create age-friendliness in their communities (The CUHK Jockey Club Institute of Ageing, 2018a). Among the various activities held by NAWA, members were invited to participate in focus groups organized by the Consumer Council to provide views on consumer-related experiences in healthcare and telecommunications sectors. Members also actively offered views and advice to innovative products from emerging start-up companies so that the end-products would better cater for the needs of older people (The CUHK Jockey Club Institute of Ageing, 2018b).

## Chapter 6

# Way forward: The future of Hong Kong as an age-friendly city



## Chapter 6

# Way forward: The future of Hong Kong as an age-friendly city

### 6.1. Multi-sectoral effort in enhancing capabilities of older people

In this report, we have discussed major topics on capabilities of older people, covering a wide spectrum of opportunities including education, employment, civic participation and the use of information and communication technology. The path to enhancing capabilities of older people is challenging and rewarding, leading to improvement of physical and mental well-being of older people and increased societal capital and productivity as a whole. Undoubtedly, the capability approach requires concerted efforts of different stakeholders such as policy-makers and government agencies as well as representatives from the business and social science sectors. Sen's economic analysis as aforementioned highlights the close relationship between the capabilities of older people and the wider social and environmental contexts in which they reside, which further highlights the importance of developing an age-friendly city for all.

### 6.2. Becoming an age-friendly city for active and productive ageing

An age-friendly city brings an inclusive and accessible community environment that optimizes opportunities for healthy living, social engagement and financial security for all residents, including older people. "Civic Participation and Employment" is a key domain of urban environmental strategy that supports active and productive ageing. Involvement of different stakeholders is needed to create such an environment. As an example, The Hong Kong Jockey Club introduced the "Jockey Club Age-friendly City Project" and is implementing a series of age-enabling interventions in collaboration with four local universities in Hong Kong (Jockey Club Age-friendly City Project, 2016). However, for concrete policy outputs and results at a national level, the HKSAR local government needs to synergize all efforts from various stakeholders in creating and implementing an age-friendly strategic framework (Press release, 2019). It is only with continual, coordinated joint efforts of the government, District Councils, universities, NGOs and the general public could an integrated approach to building up age-friendly Hong Kong be realized.

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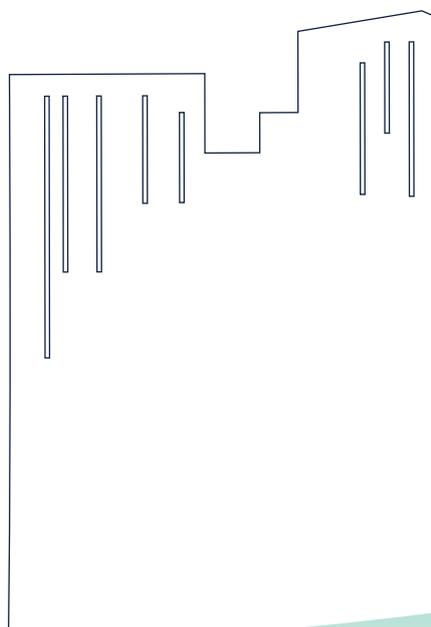
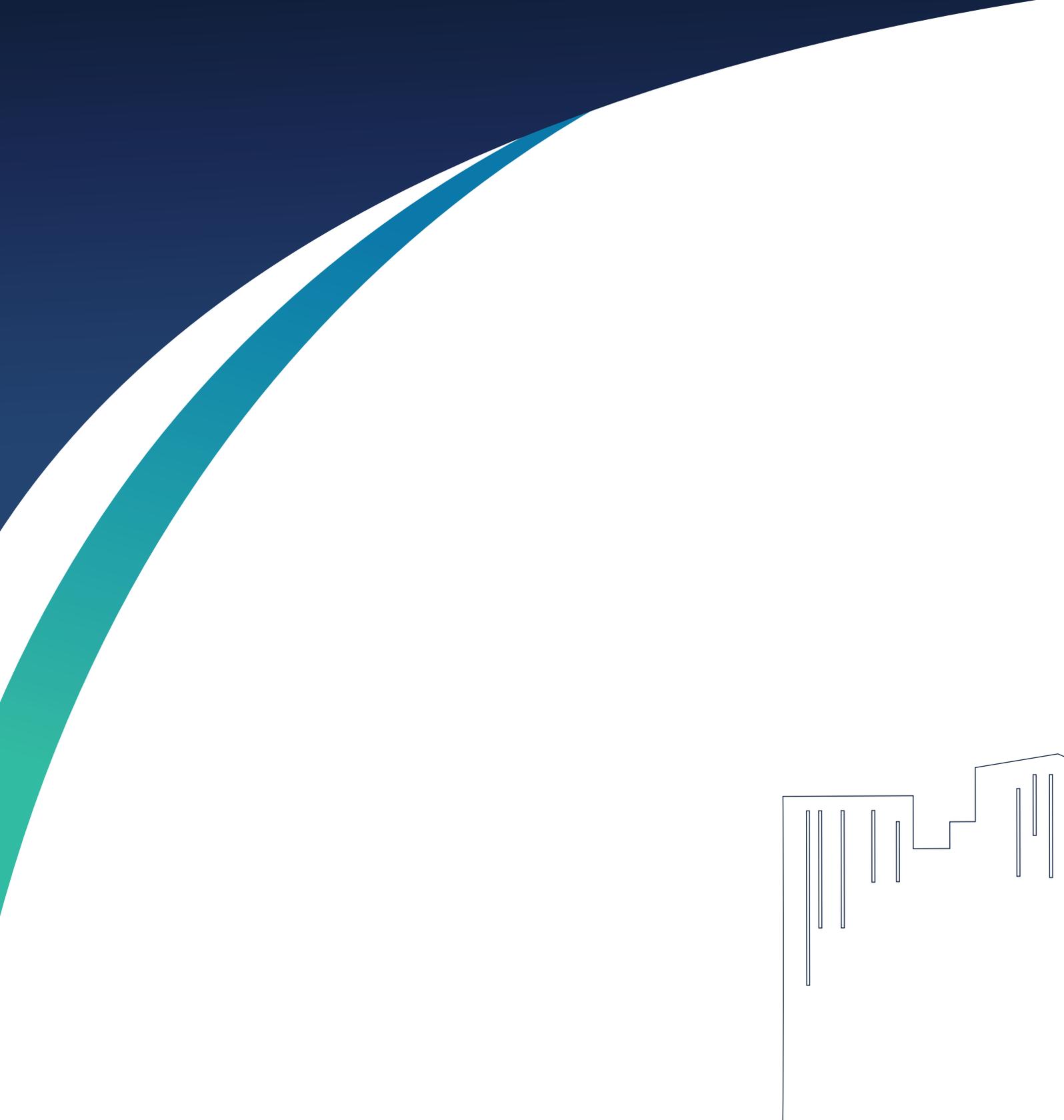
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