Older Adults' Engagement with Further and Higher Education in the West of Scotland: Tracking Educational Journeys

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Abstract: In this qualitative study, the motivations and trigger events for learning of West of Scotland older adults are explored. The range of purposes for formal learning in later adulthood is broader than most conventional typologies would suggest and work-related motives are shown to be very strong, linked to on-going vocational aspirations.

Local Context

Later life has resurged as a point of focus in Scottish Government circles, largely due to changing demography. Within the West of Scotland, just over one third (33.5%) of the ~2.4 million residents are over 50 years of age (SCROL, 2006: online). Predictions of demographic change distinguish Scotland from the remainder of the United Kingdom by earlier cessation of overall growth by 2019, while the increase in the older population is likely to continue, reaching an estimated 42% of the population by 2031 (GRO, 2005).

The study aims to contribute to understanding the dynamics of learning in later adulthood, specifically of older adults (defined as post 50 years) in Higher Education (HE) and Further Education (FE) in Scotland. Government expectations of institutions' more effective performance in terms of student recruitment, retention, progression and outcomes are in line with comparative international trends. This research provides data on the engagement of older adults, in terms of formal education provision, and primarily from the learners' perspective.

The project is funded by West of Scotland Wider Access Forum (West Forum), one of four Wider Access Forums in the country; all of which are in turn financed by the Scottish Funding Council (SFC) for FE and HE. This project, tracking older learners' experiences of formal learning, responds to West Forum's identification of older adults as a target group for social inclusion, building on previous analysis of local participation data and relevant literature, and is the first of its kind in the country.

The study conceptually links with several areas of adult education literature: critical educational gerontology; (older) adult participation in formal education; policy development in older adult education; social inclusion and widening access and participation in education. It is unapologetically linked to social justice for older adults because the recruitment of older adults to this research is from officially identified areas of deprivation in the West of Scotland. Its primary purpose is to depict the realities of older adults as they connect with FE and HE.

Local participation data demonstrate older adults to be minimally represented in Higher Education Institutions (HEIs) and Colleges in the West of Scotland. It is estimated that just over half a percent of the population is studying at an HEI (including non-credit programmes), whereas participation in Colleges is significantly higher, at just over 3% of the population. There is a noticeable gender difference in participation, with a broad ratio of 3:2 females to males. Analysis of the socio-economic status of learners demonstrates a distinct, linear relationship in HEIs – those from the least deprived areas form the

majority, decreasing in number as deprivation increases, while the reverse of this pattern is broadly true in Colleges.

Methodology

The project engages with seven institutions across the West of Scotland: four Colleges (situated in community, suburban and rural settings) and three Universities (categorised as 'ancient', 'post-1992', and the Open University). The project is tracking 86 older adults who are resident in primarily Deprivation Zone 4 (DZ4) and Deprivation Zone 5 (DZ5) areas (94.2%): those which are rated as the two most deprived quintiles in the country (government-defined indices). Those older learners who were eligible for participation in the study were enrolled in participating institutions at the time of selection. Post (zip) codes were used to confirm residency as within an area of high deprivation: the prime criterion for selection. A range of students on credit and non-credit-bearing courses was selected, with a no greater gender ratio than 3:2 (either sex in majority). Participants were invited via institutional processes while maintaining their anonymity in accord with University ethical standards.

The study involves tracking students for a period of two years, and in this initial phase we explored learners' educational histories, current learning experiences within the institutions, and their projected learning futures. The focus has been on the experiences and issues arising from current learning, such as financial considerations, triggers to re-entry, barriers to learning, and motivation. We have employed a qualitative approach, using face-to-face, semi-structured interviews, although a degree of quantitative data has also been collected (for purposes such as mapping learning aspirations over time).

Findings

Within this paper we concentrate on student motivation for study, reported by those students whose interviews had been transcribed and entered into NVivo for analysis at the time of writing (n=40). We refer to the six factor analysis of adult learning orientations devised by early researchers of motivation, Morstain and Smart (1974), as a basis for comparison, shown below:

a) Social Relationships
b) External Expectations
c) Social Welfare
d) Professional Advancement
e) Escape/stimulation
f) Cognitive Interest

Motivation for engagement appears to be linked, for many, with trigger event(s) or episode(s) in learners' lives, in the sense that participation occurs either directly or indirectly as a result of a significantly altered daily routine and circumstance. This motivation for learning is seen by many to be a factor in the adjustment of people's lives to this transition, but for a small number, occurs as pre-emptive planning for future transitions or events.

Multiplicity of Motivations

Reasons for the decision to study were categorised into the six factors developed by Morstain and Smart's (1974) cluster of motivational orientations. Attempts to categorise participant motivations within these categories proved extremely problematic, with a large number of students' reasons for learning (approximately a quarter) not easily identifiable within the six factor analysis. For example, work related reasons did not

always relate to *professional advancement*, instead to career change, or preparation for lower level roles. Other extraneous reasons include the achievement of certification/qualification (for its own sake), or planning for the future. Interestingly, no students specified external expectations or social welfare as motivational reasons for their decision to undertake a course of study, suggesting a different set of motivations for learning in later life to earlier studies on older learning, largely meeting personal need or developing family relationships rather than for broader social welfare. To take account of these considerations, while we refer to Morstain and Smart's (1974) clusters throughout the paper, we also frame motivations more broadly within Houle's (1961) typology: *learning-, goal-,* and *activity*-orientated factors.

Students often specified multiple, rather than singular motivations for participation. More than two thirds of the cohort (67.5%) specified two or more reasons for choosing to study on their course – 45% of the total explicitly state two motivating factors contributing to their choice to participate and 20% nominating three factors. Although a hierarchy or ranking of motivational considerations was rarely identified, the dominant themes of work-related motivations emerged, followed by subject interest and simply, a desire to learn. Many specified motivations were also seen to be directly responsive to external events (discussed below).

Munn and MacDonald (1988, cit in Dench and Regan, 2000), in previous research into adult learning participation in Scotland, found a correlation between socio-economic status and the type of learning undertaken: the lower the socio-economic status, the more likely learners were to have goal (instrumental) orientated reasons for study. Focussing as we are in this project on learners from areas of high deprivation, there are implicit accompanying assumptions about socio-economic status, which are in part supported or challenged by participants' occupational background histories. With this caveat in mind, learning motivations described by participants in our project support findings by Munn and MacDonald (1988), although not definitively so. While instrumental considerations have been shown to be dominant among older learners in this project, almost 80% of participants also specified learning-orientated (cognitive interest) motivations as among the key contributory reasons in the decision to participate in formal learning (such as personal growth, subject interest, the desire to learn something new). Learning for reasons related to personal development were as popular as the expressed desire to learn more about the subject itself (each being specified by just less than a third of all participants). These findings support earlier research by Dench and Regan (2000), and Sargant et al (1997) into the motivation of (older) learners, who found a dominance of intellectual-related (cognitive interest) reasons for study – be this expansion of knowledge, learning new things or acting on long-term subject interest.

The findings demonstrate a prevalence of goal-related motivation for learning, with almost 90% of respondents stating reasons that fell within this category. For the vast majority of such students, their participation was either partly or wholly related to life transitions, and engagement occurred either predominantly in response to - but also (less frequently) in preparation for - these same transitions. The single most popular reason for learning was in relation to *work* (40% of students), with the desire that learning undertaken would facilitate career change (to a more advanced level/field, or conversely to one with less associated stress, or simply to employment itself); the achievement of financial security through regular work; or the acquisition of relevant job-specific skills

and/or qualifications. Not surprisingly, the majority of students who specify work-related reasons were in the 50-54 age group, with levels of work considerations declining steeply as age increased, and not being reported at all by students older than 65, the traditional (male) retirement age in the United Kingdom. This cohort demonstrated a significantly more sustained work-related motivation than previously found in *The Learning Divide* study by Sargant et al (1997), which found that work related considerations did not occur beyond the age of 54; this is possibly due to lower financial reserves within this project group.

A further goal-related learning theme was *family considerations* (within 'social relationships'), which were reported to be a significant consideration in the decision to study. Invariably these motivations related to (adult) children and/or grandchildren, and the desire that the learning would facilitate sustained or developing relationships, or intergenerational learning and quality time with one another. One student outlines her motivation for the two courses that she's studying on:

> *…Spanish: because the girls [daughter and grandchildren] have moved to Spain and my son and daughter-in-law, as I say, if they decide to have children, they will learn German; you feel as though you have to make the effort. And as I say the computing's for me and I can keep in contact with everyone on email. Because they're all over the place. One of my sons has moved to New Zealand… *laughter* New Zealand, Spain and London at the minute… (And so you keep in contact over email?) Yea, email and telephone, uh-huh.*

Activity-related orientations for learning were a much less significant consideration for students, being identified by less than a quarter of the cohort. These were principally related to building social networks, doing it for pure enjoyment, or keeping busy.

Trigger Events and Episodes

Approximately half of participants reported a recent trigger episode or event that influenced their decision to take part in their programme. These events appeared to predispose people to proactively, independently seek out a programme, or to be more open to suggestion of the same by family or peers. This high prevalence of trigger events reported by learners as prompting their decision to engage in formal learning would seem to suggest a strong relationship between such events and learning propensity. In this sense, participation appears to be overwhelmingly reactive rather than proactive. These 'triggers' introduced formal learning into the realm of adaptive strategies to people's changing lives, where it had previously not played a role.

Bridges (1980, cit in Merriam and Caffarella, 1999: 105) describes *transitions* as 'the natural process of disorientation and reorientation that marks the turning points of the path of growth'. The complexity of this process of disorientation and reorientation is not to be underestimated – being shaped by previous life experience, perspective (disposition), skills (such as social, or work-related) and support networks. Triggers stated by students were mainly acutely personal or related to immediate family, showing the key role that motivation plays as a response to experiences or times of intense emotional involvement, or of personal impact. Events principally related to periods that required profound emotional investment and/or adjustment to considerably changed personal circumstance, such as serious illness or involuntary cessation of work.

The single most reported life change was personal illness (approximately one third of reported trigger events), not always occurring as an isolated incident (more often than not physical), and which had significant, often permanent impact on the structure and quality of everyday life of the person - the inability to return to work; being housebound; and/or resultant, sudden high levels of free time, for example. There was a resistance among learners to the acquisition of the new identity of being 'disabled', of accepting the perceived limitations that such transitions impose, and an almost defiant determination to keep going as before, with 'business as usual'. These reports of health/illness related reasons for study are consistent with earlier research into adult returners in Scotland (Gallacher et al, 2000). Parental or (adult) child illness was also regularly reported as an episode prompting engagement with learning, because of its precipitating a desire for respite from the stresses of caring commitments, of filling the free time created by the introduction of external care provision, or recovery:

> *Aye when my mother got ill. My mother's got Alzheimer's…that was a hard time … But she wasn't that bad at times…. I mean I could leave her alone… That encouraged me. I said, 'I have to do something, you know.' I didn't want to go and drink... You see how education can open up your mind and through education…it gives you knowledge and through knowledge you'll get the understanding (male student, taking non-credit analysis algebra course).*

Similarly, significant events described by learners were seen to occur with several 'knock-on' effects on lifestyle, with the decision to participate occurring after a number of changes to the person's life, representing a link in the chain of reorientation, and the learning itself becoming part of the process of growth. One student, a male in his early 60s, highlighted the pivotal role that illness played in redirecting his life, and his reaction to his pursuant long-term illness. For him, the choice to recommence formal learning occurred as one of several measures used to keep occupied:

> *I started to become unwell and…I went into hospital and was in hospital for a year. Came out, registered disabled and I'd been lying flat on my back in a bed for long enough. ...I was totally unable to work by that time… And anyway I spent a year doing all the things that I thought that I'd wanted to do…and decided I have to do something, even if it's only learning a language or learning something more about something that's always interested me. And then it occurred to me that I'd always fancied taking up art. …Ever since my art teacher in 3rd year … said, 'oh I wish you'd taken art. I thought you might – you were quite good at it.' So anyway, I thought, let's try art. And I came along to – I actually looked up into several different classes but art class was the one that stuck.*

The participant's comments suggest motivation to be pre-existent. In support of this observation, a small number of the significant events identified by learners constituted a removal of factors that had previously acted as barriers to learning, usually by way of time/familial commitments, where motivation for engagement had been long-standing, and the decision to participate occurring for pragmatic (the removal of barriers) rather than reactive (or adaptive) reasons.

Several students (approximately 10%) stated that no triggers had occurred, but explicitly stated that their decision to engage in formal learning had been influenced by planning for future events or transitions in their lives (such as foreign travel, career advancement, or change of position to one entailing less stress and/or responsibility).

Conclusion

Examination of older learners' motivation for learning has demonstrated that for the majority, learning is undertaken for more than one reason, such as self-development and subject interest. Work-related considerations were the most significant motivating factor, and remained so to a much later age (10 years) than previously reported (Sargant *et al,* 1997). The greater endurance of work-related consideration is perhaps a reflection of the lower socio-economic status of this cohort; much of existent literature on older adult learning assumes the more stereotypical, middle-class, expressive learner (see, for example, Laslett, 1989). As for earlier research, learning for learning's sake, and subject interest are also major motivating factors for older adults. Typologies were seen to be problematic and/or inappropriate to the cohort's motivational orientations. While helpful as providing insights into developing understanding, such models should be viewed with caution due to their inability to encapsulate the full spectrum of factors prompting participation, and of an implied mutual exclusivity of motivation.

While being multi-dimensional, motivation appears to be responsive to life events and resultant changes to lifestyle and environs. Further research into the dialectic between critical/trigger events and motivation (i.e. responses to environmental events), would be of considerable value in order to better understand the decision to turn to, and continue with formal learning, when for so many it had previously been a long-forgotten activity.

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