



LEARNING AT LIFE TRANSITIONS:

Supporting learners returning to work or preparing to retire

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ABOUT THE WEA

The WEA is the UK's largest voluntary sector provider of adult education. The charity teaches around 50,000 students a year and empowers adults through learning at all stages of life.

It is dedicated to bringing high-quality, professional education into the heart of communities. Through learning, The WEA helps people create positive life changes that ripple out from individuals to communities. For further information on the charity, please visit www.wea.org.uk

ABOUT L&W

Learning and Work Institute (L&W) is an independent policy, research and development organisation dedicated to promoting lifelong learning, full employment and inclusion.

We strive for a fair society in which learning and work helps people realise their ambitions and potential throughout life. We do this by researching what works, influencing policy and implementing new ways to improve people's experiences of learning and employment. We believe a better skilled workforce, in better paid jobs, is good for business, good for the economy, and good for society. For more information, please visit: www.learningandwork.org.uk Follow L&W on Twitter: @LearnWorkUK

INTRODUCTION

By John Widdowson, Chair of the WEA and Principal of New College Durham, and Ruth Spellman, CEO of the WEA

People choose to learn for many different reasons. Often, a change in circumstances is the spur. Yet when policymakers and practitioners think about adult learners those external circumstances are often put to the back of the mind. The focus is on the learner in the classroom (or, increasingly, at the end of a broadband connection) and how they can be supported, irrespective of what brought them there. In many respects, this is how it should be – it encourages an equality of approach without preconceptions and it allows the student to bring as much or as little of their external life to their learning as they wish. But it also limits our ability to provide fully responsive education support. If we do not completely understand what motivates learners – or potential learners – to engage with education then we are not best placed to align our courses with the real needs of our students. Even if we achieve a snapshot of our learners' motivations at any point in time, are we, as practitioners, able to adapt as circumstances change? Do we fully appreciate how life transitions affect why, when and how people chose to learn?

Given the alarming decline in adult learner numbers in recent years, it is vitally important to explore all ways in which a change in policy or practice might stem or reverse the trend. A more nuanced view of adult learning is required. A focus on life transitions is a way of exploring the diversity and fluidity of the adult learner population. We were aware of the growing body of work looking at motivations and barriers for adult learners

and also the many 'commissions' exploring the policy landscape for adult learning. It seemed like a perfect time to combine our interest in understanding and supporting adult learners with our parallel interest in building an evidence base which can inform future policy and funding.

This led us at the WEA to convene a steering group comprising organisations from across adult, further and higher education to map out a research proposal which would offer recommendations for sector leaders and policymakers. In 2018, this proposal was put to the Further Education Trust for Leadership, which generously agreed to fund the project. We commissioned Learning and Work Institute to carry out desk and field research and deliver the report you are about to read. We quickly realised that we could not explore all possible life transitions. Accordingly, we settled on two which we felt were under-researched and which could generate practice and policy recommendations in challenging areas. These are adults returning to work after childcare and adults preparing for retirement, two key transitions, one or both of which will face most adults in their life. We knew that these would interest practitioners across the education sector and also policymakers, not just in education but also in other areas, including those with an interest in the workplace, families, health, personal wellbeing and the challenges of an ageing population.

We would like to thank all those who helped bring this project to fruition: the Further Education Trust for Leadership for their generous funding support; Learning and Work Institute for carrying out the research so thoroughly, especially the authors of this report; Professor Tom Schuller who prepared an influential paper for the steering group, which helped to focus our minds and our research specification; and all the individuals and organisations that contributed to the steering group, including the Association of Colleges, the National Extension College, NOCN, the National Union of Students, the Open University and the University Alliance.

We intend this report to stimulate ongoing discussion and debate. We will share its findings and recommendations through articles, blogs and seminars, and distribute copies to leaders across the sector.

As the WEA Strategy to 2025 clearly says adult education is not a homogenous type of education which can be rolled out according to a rigid curriculum or life plan It has to be flexible and it must meet a variety of needs and life circumstances. It follows that we need flexible institutions and flexible funding.

Within the WEA we try to maximise choices for the student, learn as much as we can about them and provide solutions which address their needs. Empathetic and experienced Tutors are essential, an engaging style and lots of opportunities to practice. There are distinctive features of successful adult education whatever the setting and this report helps to identify them and zone in on the perceptions attitudes and behaviours of learners at key transition points. It is recommended reading for practitioners, delivery partners, commissioners and policy makers and I commend it to you all.

We would also like to hear your reactions and views on the report. You can share them by writing to Chris Butcher, Public Policy Manager at the WEA: policy@wea.org.uk.

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FOREWORD

Dame Ruth Silver

The Further Education Trust for Leadership (FETL) is pleased to have funded this WEA project, delivered by the Learning and Work Institute. It is important that we understand the role of education and learning in enabling adults to manage moments of transition and upheaval in their lives, and retirement and returning to work after caring for children remain two of the most fundamental life transitions we are likely to face.

People experience such transitions in different – and, indeed, changing – ways and need different kinds of support in adapting to change. For that reason, we need to approach this issue, as the authors of this report do, sensitively and with a willingness to listen. The responses of the learners interviewed for the project demonstrate both the complex ways in which we experience transition and the challenges we face in accessing the learning we need to negotiate it successfully.

These challenges can concern cost, access to childcare or the availability of appropriate provision, or they can simply be a matter of having the confidence to return to learning. Everyone who has worked in further education for any period of time will appreciate that, for many adults, the step back into learning is a profoundly difficult one, ‘overwhelming’, as one participant put it, particularly if they had negative school experiences. Understanding this and factoring it into the way in which we design our education system is critical.

As the authors point out, it is important that we have a system of education that is coherent and flexible, that adapts to the

changing needs of adults, throughout their lives and in all the different contexts in which they learn, and, crucially, that it is there when they most need it. Greater investment is key to this, of course, but we need also to think much more coherently and holistically about education policy in the light of the huge challenges we face, from demographic change to growing levels of poverty and inequality in many of our communities.

The changing nature of work and of retirement mean that these transitions are changing in nature and need to be rethought. People are more likely to move between jobs, or to need to re-skill or up-skill, than they were 20 or 30 years ago. They are also much more likely to continue working after 'retirement', or to seek different ways of combining work and life, and not only when approaching the sort of age traditionally associated with retirement. Transition is increasingly a part of our everyday life; an ongoing consideration.

It is pleasing to see some of these ideas being explored here. I very much hope it will add to our understanding of the relationship between learning and transition, the opportunities that exist and the barriers people face in making the most of them. We can no longer afford to think of education as something that ends at 16, or 18, or 21. We need to invest in our people throughout their lives, ensuring that opportunities are available for adults to learn at every life stage, particularly for those who need it the most.

Dame Ruth Silver is President of the Further Education Trust for Leadership

EXECUTIVE SUMMARY

Adult learning can lead to a host of positive benefits for both the individual learner and wider society, including improved health, wellbeing and productivity. Increasing and widening access to learning is crucial to future prosperity, as well as to fairness and social inclusion within our nation. Despite this, the UK has seen a recent decline in the number of adults participating in learning and training. Moreover, persistent inequalities exist in who participates, with some groups, such as older people and those furthest from the labour market, least likely to be learning.

Learning and Work Institute (L&W) was commissioned by the WEA: Adult Learning Within Reach and funded by the Further Education Trust for Leadership (FETL) to undertake a mixed-methods study to explore the motivations for, barriers to, and experiences of learning for adults at two key life transitions: returning to work after caring for children, and retirement. A focus on each of these transitions is extremely topical, given the current policy focus on how adults can be supported to upskill, retrain and progress at work throughout longer working lives. Gender inequalities¹ in the workplace are also becoming more prominent, as is the role that learning can play in maintaining health and wellbeing into older age.²

This mixed-methods research involved: a rapid review of evidence on adults' experiences of learning during the transition back to work after caring for children and through retirement; collecting and analysing data on each of these transitions from L&W's 2018

1 PWC. 2016. *Women Returners*: <https://www.pwc.co.uk/economic-services/women-returners/pwc-research-women-returners-nov-2016.pdf>

2 L&W. 2017. *Healthy, Wealthy and Wise*: <https://www.learningandwork.org.uk/wp-content/uploads/2017/01/LW-EU-Report-Nov-2017-V8.pdf>

Adult Participation in Learning Survey; qualitative interviews with learners going through each transition; and focus groups with adults in the same circumstances who had not engaged in learning for three years or more.

Key findings

Transition involves a change in circumstances. For both those preparing for retirement and those returning to work after caring for children, this change is significantly influenced by their involvement in the labour market; either as they move out of it (partially or fully), take time away from it, or re-enter it (or consider doing so).

The findings of our research suggest that these transitions can prompt a reappraisal of the decisions and actions that shape an adult's life course, particularly as priorities shift and change, and new things become important. Engagement in learning can become more of a priority, especially when seen to play a pivotal role in helping people achieve their ambitions and aspirations.

At the same time, these transitions also affect some of the practical factors that are involved in an individual's decision about whether to participate in learning, particularly in relation to time, cost and availability of childcare.

As our wider research has shown,³ there is rarely one attitudinal or practical factor that influences the decision to take up learning. Rather, a range of intersecting enabling and hindering factors are simultaneously at play. Learning is most accessible when it both becomes a priority/something that is valued more than other activities, and physical/practical factors enable it.

3 Kantar Public and L&W. 2018. *Decisions of adult learners*. Department for Education: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/742108/DfE_Decisions_of_adult_learners.pdf

Transition into and through retirement

Participation in, and decisions about, types of learning opportunities alter as adults retire. Although participation in learning tends to decline with age, those approaching retirement have higher levels of participation than the national average. They are most likely to be engaged in work-based learning opportunities. As adults move through this transition, participation in learning declines. Recently retired adults are more likely to seek independent learning opportunities.

The reasons why they learn also change. When approaching retirement, learning for career-related reasons can still be quite important. Once in retirement, learning for leisure becomes more prevalent.

Moving into retirement can create space to consider learning for enjoyment for the first time. Retirement can provide the time and space to pursue long-held interests or take up something new, rather than having to focus on learning for work-related reasons.

The perceived value of learning can often be greater than at previous life stages, with many adults placing greater value on the role of learning, particularly in relation to providing intellectual and social stimulation, than they had earlier in their life.

Adults facing retirement experience a range of barriers to engaging in learning. Attitudinal factors, such as feeling too old, not wanting to learn or the perception that their skills and capabilities may have deteriorated can be common. As adults move into retirement, cost also becomes a greater consideration, leading to suggestions from some that retired adults should have access to heavily subsidised or free provision.

A range of approaches could be used to support more adults to engage in learning as they retire. These include ensuring that relevant provision – such as retirement courses are both

available and well publicised. More flexible, short-term, local and low-cost provision would also be welcomed. Communicating the role that learning can play in social and intellectual stimulation is important. More broadly, there is also a role for providing information about how to spend retirement enjoyably, such as taking up learning.

Transition back to work after caring for children

Adults, and in particular women, with caring responsibilities who are outside of the labour market are under-represented in learning. Adults who return to work after a period of caring are more likely to access learning through a training course at work. Those not working are more likely to learn independently.

During this life stage, family is the main priority. While learning is seen as important, and often becomes more important during this transition of returning to work, the demands of family life can make the decision to learn more challenging.

Taking parental leave or returning to work can act as a trigger to engage in learning. This can happen when:

- **Adults have more time**, prompted by practical factors such as their youngest child starting school or being on parental leave. Taking time out from work means that learning opportunities that would not have been possible whilst they were working or caring full-time may now be accessible to them.
- **Attitudes/perceptions change.** Taking time out to care for children can create opportunities to focus on future aspirations. Considering or planning a return to work can prompt a re-evaluation of career plans. Taking up learning was seen by participants as a way of meeting these goals.

A range of factors can influence take up of learning throughout the transition back to work. 'Improving career options' or 'learning for work-related reasons' is cited as a key

driver for learning. Learning is valued when perceived to support returners to gain new skills, knowledge and increase their confidence, thereby improving their experience of returning to an existing job or moving into a new career. Learning is also perceived as playing an important role in better equipping parents to support children with their schoolwork.

Returners also face a range of barriers to learning. Adults returning to work after caring for children tend to face significant challenges in relation to work and time pressures, primarily related to childcare. For those who have spent a long time out of education, lack of confidence in being able to learn successfully is also an issue; for some, the thought of returning to learning is 'overwhelming'.

A range of approaches could be used to support more returners to engage in learning. These include practical measures such as ensuring that suitable, quality and flexible childcare provision is available, as well as financial assistance and other support from employers. Honest and accurate messaging about the experience of learning is crucial in equipping returners to manage the demands of family life while learning. Flexible provision combining working and learning, or with a particular career focus, is likely to be most attractive to those furthest away from learning.

Recommendations for policy

- **National lifelong learning strategy.** The pace and scale of economic, social and demographic change is unprecedented within our lifetime. It is vital that every effort is made to harness the opportunities presented by the 4th Industrial Revolution, while ensuring that no one – including those seeking to leave or return to the labour market – is left behind. Government should lead the development of a national lifelong learning strategy, aligned to wider policy objectives.

- **Increase investment in lifelong learning.** Declining participation and persistent inequalities in lifelong learning limit individual opportunity, hamper social justice and hold back economic growth. Government should reverse the decade-long fall in real-terms investment in lifelong learning to drive economic growth, promote social justice and support inclusive communities.
- **An entitlement to lifelong learning.** Despite a wealth of evidence on the benefits of learning, fewer adults are learning than ever before and persistent patterns of participation are reinforcing inequalities. Urgent action is needed to address this. Government should consider whether, coupled with a step change in investment, the introduction of an entitlement to lifelong learning would have a role to play in addressing this challenge.

An entitlement to lifelong learning could form the cornerstone of a national lifelong learning strategy: facilitating flexible, high-quality learning opportunities in a broad range of settings; encouraging greater and wider access to learning, facilitating pathways for adult learners to progress; and promoting the wider individual and social benefits of learning, including in relation to health and well-being.

- **Personal learning accounts.** There is a growing interest in, and momentum, around the idea of personal learning accounts. Several different models have been proposed and further work is needed to develop and trial an effective approach. Government should develop and trial a personal learning account model, as a mechanism to both stimulate greater engagement in learning and provide a vehicle through which investment in learning by the state, employers and individuals can be aligned and optimised.

Drawing on the findings of this study, there is a case for aligning personal learning accounts with key life

transitions by undertaking focused promotion of accounts and/or providing 'top ups' at key life stages, such as returning to work or preparing for retirement.

- **An entitlement to career reviews as part of age- and stage-appropriate information, advice and guidance.** A key challenge for adults at retirement stage and those who have been out of the labour market while caring for children to accessing learning, retraining, financial or career-planning opportunities is the lack of suitable information, advice and guidance. As part of its wider careers strategy, government should introduce an entitlement to career reviews for adults at key points of transition. It should also consider the breadth of these reviews, recognising the interplay between education, work, family and health.
- **National Retraining Scheme.** As part of the wider development of the National Retraining Scheme, the government should give particular attention to how returners can be supported to upskill and retrain to re-enter the labour market. Consideration should also be given to how the Scheme will support older adults managing extended working lives, including transition into semi-retirement and unpaid work. This has the potential to provide a framework to explore supporting the skills needs of adults at other key life transitions.
- **Access to apprenticeships.** Apprenticeships can be an important means of supporting adults at key transition points to develop their skills while working. As part of its wider commitment to review how apprenticeships deliver value for money while improving individuals' skills and supporting increased productivity, government should pay particular attention to ensuring that the programme is accessible to returners. Flexible timetabling and blended learning options to facilitate part-time and flexible apprenticeship models should be developed and promoted. Ensuring that apprenticeships are consistently

of high quality and offer real progression opportunities and wage returns is particularly important for returners.

Recommendations for practice

- **Tailor outreach and engagement activities to the interests, motivations and priorities of adults at life transitions.** Adults are more likely to respond to material that includes images and learner testimonials of 'people like me' and addresses the concerns they may have about learning. For example, all the participants in this study, thought that a focus on 'It's never too late to learn' would be effective in engaging new adult learners. Promotional materials should also focus on relevant outcomes to the intended target group.
- **Identify and use relevant intermediaries to engage adults in thinking about learning.** Adults are more likely to engage in learning if they are encouraged and supported by individuals and organisations that they trust, including family members and friends. Employers can play a valuable role, particularly in supporting adults as they move in or out of the labour market. Schools and childcare providers could also play a greater role in informing and engaging adults in their own learning.
- **Provide clear, thorough and accurate information about the provision on offer.** The affordability of learning plays an important role for many adults when deciding whether to engage in learning; in particular, information on cost needs to be transparent and reliable. For returners, having honest and accurate information about what the learning experience entails and what support options (e.g. childcare) are available is crucial to support their decision-making process and manage expectations.
- **Provide opportunities for adults at key life transitions to take a first step into learning and build confidence.** Retired adults and those who have been out of the

labour market while caring for children tend to be under-represented in learning. Those who are learning, are often doing this independently, and would therefore benefit from provision, such as taster courses, that builds confidence and provides an accessible pathway into further opportunities. Older adults were often worried about their ability to 'keep up' with other learners, while time out from work had impacted on the confidence levels of some returners.

- **Provide a curriculum that aligns with the goals, aspirations and interests of adults across a range of life stages and transitions.** Adults in both groups expressed concern that much of the learning currently on offer was targeted at young people studying full time or entering the labour market for the first time. As such, they often felt that the provision offer did not align well with their aspirations and interests. Returners expressed particular interest in being able to access more career-related courses, as well as provision to develop their basic skills and to build confidence. Adults approaching retirement would like to see a stronger to help them plan this stage of life, as well as a wider range of leisure and personal interest courses.
- **Offer flexible provision that can fit alongside learners' competing priorities.** Returners in particular have to manage several competing priorities, including work, family and caring responsibilities. During this transition, family is their main priority, and provision should therefore be designed to flex around this. Blended courses and online provision have a role to play, as do more opportunities to learn in the workplace and greater employer support for learning.
- **Provide quality, affordable childcare provision.** Returners face a range of barriers to learning, though sourcing childcare is the most challenging. Ensuring that suitable, quality and flexible childcare provision is

available would support more adults at this key transition to engage in learning.

We recognise that providers are limited in the extent to which they can offer childcare support within existing resources and facilities. Organisations such as Save The Children (through their Make Childcare Work campaign) and Coram Family and Childcare are campaigning for better and fairer childcare provision. This is primarily to help parents return to work, but would also serve to improve early years support for child development. We encourage government and providers to work more closely with childcare advocates to develop a system which supports both work and learning opportunities.

- **Create appropriate support and progression pathways that recognise learners' changing priorities and circumstances.** Change is a dominant feature of any transition, including that associated with retirement or returning to work after caring for children. For adults to continue with their learning and to progress onto further opportunities as their priorities and circumstances change, tailored support and flexible pathways will be needed.
- **Regularly review your provision and learner profile to better understand the extent to which you are attracting and meeting the needs of adults at key life stages.** In doing so, there is a need to avoid overburdening learners with intrusive data collection, while collecting appropriate data to ensure that the provision and support on offer is relevant and appropriate, and that possible barriers to learners are minimised.

1. INTRODUCTION

The UK economy and society faces many critical challenges:⁴ advances in technology and the changing nature of work suggest that an estimated 10–35 per cent of UK jobs are at high risk of replacement in the next 20 years; we are one of the world's richest countries and yet a growing number of working families live in poverty; an ageing population is increasing the need for adults to reskill throughout their extended working lives, while posing significant challenges in relation to tackling social isolation and meeting our growing health and social care needs; social mobility is low by international standards with life chances in the UK far too dependent on family background.⁵ Providing opportunities for all adults to engage in relevant, high-quality learning opportunities throughout their lives has a key role to play in ensuring that we successfully address these challenges.

The benefits of learning for adults of all ages are well evidenced. There is strong evidence of the economic value of formal qualifications, with no apparent disadvantage if these are obtained after the age of 25.⁶ Participation in learning can also result in an important range of wider benefits, with research demonstrating a positive impact on health and wellbeing, as well as upon wider families and communities.⁷ Increasing and

4 Government Office for Science, Foresight. 2018. *Future of Skills and Lifelong Learning*: <https://www.gov.uk/government/publications/future-of-skills-and-lifelong-learning>

5 Royal Academy of Engineering. 2012. *7 key truths about social mobility: The interim report of the APPG on social mobility*: <https://www.raeng.org.uk/publications/other/7-key-truths-about-social-mobility>

6 Government Office for Science. 2018. *Future of Skills and Lifelong Learning*: <https://www.gov.uk/government/collections/future-of-skills-and-lifelong-learning>

7 L&W. 2017. *Healthy, Wealthy and Wise*: <https://www.learningandwork.org.uk/wp-content/uploads/2017/01/LW-EU-Report-Nov-2017-V8.pdf>

widening access to learning is crucial to future prosperity, as well as to fairness and social inclusion within our nation.

Yet, despite the strength of this evidence, the UK has seen a recent decline in the number of adults participating in learning,⁸ with the number of adult learners at its lowest level in nearly two decades. Learning and Work Institute's series of annual surveys of Adult Participation in Learning shows a steady decline since 2001, when 46 per cent of adults reported taking part in learning, to a record low of just 35 per cent in 2018. In addition, studies have consistently demonstrated persistent patterns of inequality in participation.⁹ Younger adults, people who already have higher-level qualifications and those in higher socio-economic classifications are most likely to be learning; with participation levels declining with age and distance from the labour market, and lowest for those with fewer or no formal qualifications.¹⁰ This poses particular challenges for those facing retirement or returners seeking to re-enter the labour market following a break to care for children.

If we are to engage more adults in learning and address these inequalities, it is vital that we understand the reasons why different people are motivated to engage in learning, the barriers they face, and what would help overcome these. Previous research shows that motivations for learning among adults are wide-ranging and influenced by personal, social and economic circumstances, as well as past experiences.¹¹ For example,

8 Department for Education. 2017. *Further Education and Skills in England (SFR 62/2017)*: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/660580/SFR62_Nov_2017.pdf

9 Egglestone, C. et. al. 2018. *Adult Participation in Learning Survey 2017*. Department for Education: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735438/Participation_in_Learning_Survey_2017.pdf

10 Government Office for Science. 2018. *Future of Skills and Lifelong Learning*: https://www.gov.uk/government/publications/future-of-skills-and-lifelong-learningds/system/uploads/attachment_data/file/660580/SFR62_Nov_2017.pdf

11 Pennacchia, J., Jones, E. and Aldridge, F (L&W). 2018. *Barriers to Learning for Disadvantaged Groups: Report of Qualitative Findings*. Department for Education: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735453/Barriers_to_learning_-_Qualitative_report.pdf

motivations to learn among those considering semi-retirement may be more work-focused, whereas for those looking to exit the labour market may be more associated with personal enjoyment or areas of interest. For those returning to work after caring for children, motivations to learn tend to be both career-led and family-oriented.

For those returning to work after caring for children, institutional barriers to engaging in learning, such as lack of suitable childcare can be an important consideration. Dispositional barriers can also play a key role for parents and carers as they consider whether it is right for them to take time away from the family to invest in themselves. Parents with poor experiences of initial education and/or those with lower-level qualifications, are particularly likely to lack confidence in their ability to learn successfully as an adult.

Those who have recently retired or who are approaching retirement, can likewise struggle with their confidence to learn new things, often believing that they are too old to learn. If we are to encourage more adults, including those journeying through these two key life transitions, to learn and progress, it is essential that a range of practical and circumstantial factors are understood and addressed, including cost, childcare, awareness of opportunities and employer support.

In recognition of the challenges ahead and the contribution that a renewed focus on lifelong learning could make in helping to address these, many of the political parties are turning their attention to how we should both increase participation in learning and address inequalities within it. The Labour Party is currently developing its ideas for a National Education Service and the Liberal Democrat Commission on Lifelong Learning has recently reported. The Conservative government is focusing on career learning and the development of the National Retraining Scheme (NRS) as well as commissioning the Augar Review of Post-18 Education and Funding, which will look at how future learners will contribute to the cost of their studies.

The cross-party consensus on the need to stimulate lifelong

learning, presents an important and opportune moment for the sector to come together to help shape future policy and practice. This is what this study is intended to do.

1.1 About this study

Funded by the Further Education Trust for Leadership (FETL), Learning and Work Institute (L&W) was commissioned by the WEA: Adult Learning Within Reach and a cross-sector steering group to undertake research to explore the motivations for, barriers to, and experiences of learning for adults at two key life transitions: returning to work after caring for children, and retirement.

The mixed-methods study involved the following four stages:

- **Rapid evidence reviews** to draw together evidence from existing literature on adults' experiences of learning during the two key life transitions considered within the study, alongside the wider evidence on broader patterns of adult participation in learning.
- **Collection and analysis of quantitative data from L&W's 2018 Adult Participation in Learning Survey.** To facilitate this analysis, an additional question was included in the survey to identify respondents returning to work after caring for children, and those preparing for retirement. From an overall representative sample of 5,000 adults across the UK, 516 (10%) were recently retired and 243 (5%) said they were expecting to retire. In addition, 295 (5%) were caring while not working (76 of whom were considering returning to work) and 231 (4%) were both caring and working.
- **In-depth interviews** to gain further insight into the interaction between each transition and engagement in learning. Twenty qualitative interviews were conducted with current and recent learners; ten of whom

were approaching retirement or had recently retired, and ten of whom were considering returning, or had recently returned, to work following a period of caring for children.

- **Focus groups** to better understand the reasons behind not engaging in learning as an adult and what changes to policy and practices would enable those who are not current or recent learners to take up learning. Two focus groups, one for each transition, were conducted with adults without recent experience of learning.

Further details about the methodology can be found in *Annex 1*.

2. WHO PARTICIPATES IN ADULT LEARNING?

Participation in learning matters. It makes a difference to the social and economic well-being of individuals, families, communities and nations. It is good for our health, our longevity and the social cohesion of the communities in which we live.

Yet despite a growing evidence base on the benefits of learning, active participation in learning remains a minority activity – with latest research showing declining rates of engagement. Furthermore, opportunities to participate in learning are not evenly distributed, with younger adults and those who have benefited most from the initial education most likely to learn as adults.

Identifying who participates in learning and understanding how to engage more and different adults to learn is critical if we to open up opportunities for all. Adult learning can help tackle wider inequalities but will only do so if inequalities in participation are addressed.

2.1 Adult Participation in Learning Survey: Patterns of participation

Since 1996, Learning and Work Institute (then NIACE) has been undertaking an Adult Participation in Learning Survey on an almost annual basis. The survey provides a unique overview of the level of participation in learning by adults, with a detailed breakdown of who participates and who does not over a span of more than 20 years.

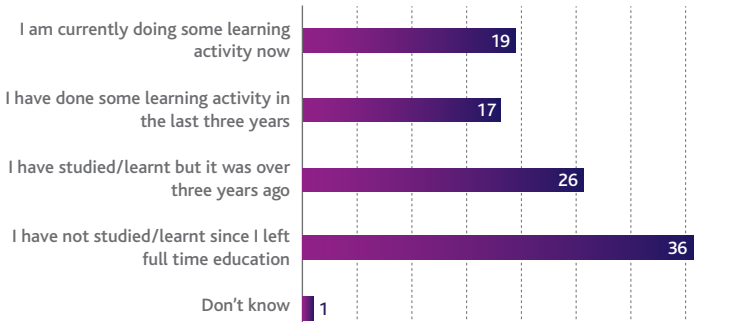
The survey adopts a broad definition of learning, including a wide range of formal, non-formal and informal learning, far beyond the limits of publicly offered educational opportunities for adults.

Each year, a representative sample of approximately 5,000 adults aged 17 and over across the UK (or Great Britain in 2017) are provided with the following definition of learning and asked when they last took part:

Learning can mean practising, studying or reading about something. It can also mean being taught, instructed or coached. This is so you can develop skills, knowledge, abilities or understanding of something. Learning can also be called education or training. You can do it regularly (each day or month) or you can do it for a short period of time. It can be full time, or part time, done at home, at work, or in another place like a college. Learning does not have to lead to a qualification. We are interested in any learning you have done, whether or not it was finished.

The 2017 survey showed that around a fifth of adults (19%) were currently learning, with a further 17% having done so in the previous three years (see *Figure 1*). Over a third of adults (36%) said they had not learnt since leaving full-time education, with a further 26% having done so, but over three years ago.

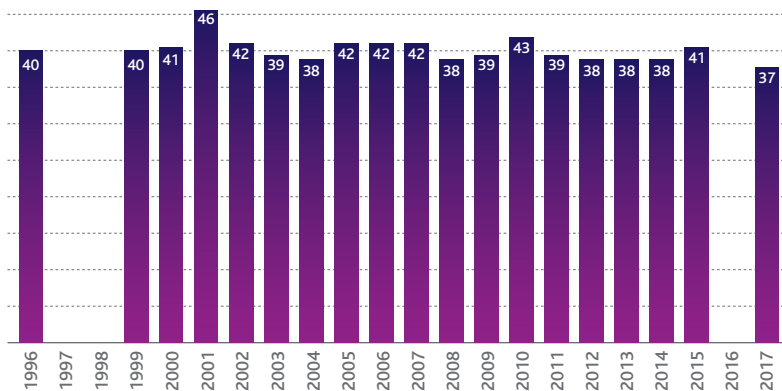
Figure 1: Participation in learning



Base: all respondents. Total unweighted base = 5169

At 37 per cent of all adults, the 2017 survey highlighted the lowest participation rate (current or recent learning) in the 20-year history of the survey, indicating considerable challenges for engaging adults who are least likely to learn. (see *Figure 2*).

Figure 2: Participation in learning, 1996–2017



Base: all respondents to each survey. Unweighted base for 2017 = 5169

Drawing both on the 2017 survey findings, and the wider evidence base, a recent L&W report on barriers to learning identified a number of long-standing trends apparent in relation to who participates in learning:¹²

Parental experiences of learning: The likelihood of participating in learning in adulthood is strongly influenced by family experiences and attitudes towards education and learning.¹³ Learning as a family, and learning across generations, has been shown to increase the overall level of children’s development by as much as 15 percentage points for those from disadvantaged groups.¹⁴ Improving the education and qualification level of adults

12 Pennacchia, J., Jones, E. and Aldridge, F (L&W). 2018. *Barriers to Learning for Disadvantaged Groups: Report of Qualitative Findings*. Department for Education: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735453/Barriers_to_learning_-_Qualitative_report.pdf

13 Tuckett, A. and Field, J. 2016. *Factors and motivations affecting attitudes towards and propensity to learn through the life course*. Foresight, Government Office for Science: https://dera.ioe.ac.uk/29182/1/Skills_and_lifelong_learning_-_attitudes_to_learning.pdf

14 Sheffield City Council, Analysis of foundation stage pupil data, 2011–2012.

is not just about them but also about their children. Upgrading adult skills can bring large returns for their children.¹⁵

Initial experiences of education: Learning identities are shaped early, influenced by family expectations and initial education. Adults who have experienced early successes in education are more likely to continue to learn throughout adulthood. This early positive educational experience provides ‘cumulative advantage’ throughout the life course.¹⁶ Conversely, learners who do not experience success in compulsory education are less likely to engage in learning as adults. Those who leave education at the earliest opportunity are less likely to engage in learning later in life.

Age: National measures of participation consistently show that rates of learning decline with age. This is despite the rise in life expectancy in the UK and longer working lives. There is, therefore, an economic and social case for ensuring access to learning for people aged 50 plus.¹⁷ The 2017 Adult Participation in Learning Survey found a nine percentage point drop in participation among learners aged 45–54, compared to the 2015 survey.

Social class: Social grade is a key predictor of participation in learning. Occupational status, parental education level and experiences, income and level of qualification all shape the likelihood of participating in learning as an adult and are all interrelated with social class.¹⁸ Over the last two decades, the Participation Survey has found that the higher the socio-economic group someone is in, the more likely they are to be engaged in learning. The 2017 survey showed that people in the

15 Sabates, R. 2008. *The Impact of Lifelong Learning on Poverty Reduction: IFLL Public Value Paper 1*. NIACE: <http://www.learningandwork.org.uk.gridhosted.co.uk/wp-content/uploads/2017/01/The-Impact-of-Lifelong-Learning-on-Poverty-Reduction-Public-Value-Paper-1.pdf>.ioe.ac.uk/29182/1/Skills_and_lifelong_learning_-_attitudes_to_learning.pdf

16 Schuller, T. and Watson, D. 2009. *Learning Through Life: Inquiry into the Future for Lifelong Learning*. NIACE: <http://www.learningandwork.org.uk.gridhosted.co.uk/wp-content/uploads/2017/01/Learning-Through-Life-Summary.pdf>

17 McNair, S. 2015. *Older people, learning and education: what do we know? A NIACE paper for the Department for Business Innovation and Skills*. NIACE: <http://stephenmcnair.uk/wp-content/uploads/2015/07/2011-Older-Learners-Key-Facts.pdf>

18 Savage, M. 2015. *Social class in the 21st Century*. London, Pelican.

AB grade are twice as likely to participate as people in the DE grade (51% compared with 23%). In contrast, twice as many adults in the DE grade have not participated in learning since leaving full-time education as those in AB (53% compared with 22%).

Connection to the labour market: Those with no connection to the labour market have lower rates of participation in learning. Being employed in a low-skilled job or being registered unemployed provides more opportunities to learn than being unconnected to the labour market.¹⁹ More educated people are more likely to be in employment contexts where they can take advantage of further learning and training.²⁰ People in lower-paid and lower-skilled roles receive the least training in the workplace.²¹ Work-based training is also more likely in public sector roles rather than the private sector.²² Work is important, both as a place where learning takes place, and as a motivating factor for undertaking learning.²³

Gender: Participation in learning as an adult is interrelated with gender in complex ways. Those who initially do well in the education system, both men and women, are more likely to participate in learning as adults. In 2009, Schuller and Watson found that women were more likely to participate in learning as young adults but by 50 the rates equalised.²⁴ The 2017 Adult Participation in Learning Survey indicated that women have a significantly higher participation rate than men; in total, 39 per cent of women are participating in learning, compared with 35 per cent of men.

19 Schuller, T. and Watson, D. 2009. *Learning Through Life: Inquiry into the Future for Lifelong Learning*. NIACE: <http://www.learningandwork.org.uk/gridhosted.co.uk/wp-content/uploads/2017/01/Learning-Through-Life-Summary.pdf>

20 Ibid.

21 Ibid.

22 Ibid.

23 Aldridge, F. and Hughes, D. 2012. *Adult Participation in Learning Survey: Headline Findings*. NIACE: <https://www.learningandwork.org.uk/wp-content/uploads/2017/01/2012-NIACE-Adult-Participation-in-Learning-Survey-Headline-Findings.pdf>

24 Ibid.

Ethnicity: Headline figures from participation measures indicate that participation is higher overall among adults from Black, Asian and minority ethnic (BAME) backgrounds. For example, the 2017 Adult Participation in Learning Survey found that respondents from BAME backgrounds are significantly and substantially more likely to be participating in learning than respondents from White backgrounds (48% compared with 35%). Grouping individuals from BAME backgrounds into one masks differences between different ethnicities. A 2008 study found that individuals with Black African heritage or mixed heritage had significantly higher rates and were in stark contrast to individuals from Pakistani and Bangladeshi backgrounds.²⁵

Having a disability or learning difficulty: People with a disability are less likely to participate in learning.²⁶ They are also less likely to participate in the labour market, which is related to lower rates of participation in learning. A lack of mobility may make it difficult to access some learning venues, where they have not been made into inclusive and accessible learning spaces. People with disabilities may also face additional barriers resulting from negative experiences of compulsory education, intimidation and being labelled, and people having lower aspirations for them.²⁷

Being a 'slower adapter to technological advances': Slower adapters to technological advances experience greater barriers to learning. They are more likely to be: people in social housing; people with lower incomes or who are unemployed; people with disabilities; rural populations; older people; traveller communities; homeless people; young people who are not in education, employment or training (NEET); and people with 'no

25 Aldridge, F., Lamb, H. and Tuckett, A. 2008. *Are we closing the gap? Briefing on participation in learning by adults from minority ethnic groups*. NIACE.

26 Copestake, P. 2014. *Removing barriers, raising disabled people's living standards*. Office for Public Management, Ipsos MORI

27 Ibid.

recourse to public funds', although this list is not exhaustive.²⁸ Access to technology has been found to have a modest impact on the propensity to learn,²⁹ and one which has remained fairly consistent over time, despite continual changes in the way the internet is used as a learning resource.

Language needs: Adults with poor English skills can struggle to access education for a range of reasons including poor access to information advice and guidance that is clear and usable, levels of confidence and cost. Current ESFA funding rules makes cost a particular barrier to accessing ESOL provision, 'pricing out' certain groups including those in low-paid work, asylum seekers who are not entitled to benefits, and women who tend to be on 'inactive benefits'.³⁰

2.2 Adult learners' motivations, barriers and benefits

As well as providing insight into who does and does not participate in learning, the 2017 Adult Participation in Learning Survey also provides a rich evidence base on adult learners' motivations, barriers, and benefits experienced.

What motivates adults to learn? The 2017 survey showed that three-quarters (75%) of learners primarily took up learning for work or career-related reasons, and just under a quarter (24%) for leisure or personal interest. Younger respondents and those in employment were most likely to be learning for work-related reasons, with learning for leisure or personal interest more prevalent among those over 65 and retired adults.

28 Aldridge, F. and Hughes, D. 2012. *Adult Participation in Learning Survey: Headline findings*. NIACE: <https://www.learningandwork.org.uk/wp-content/uploads/2017/01/2012-NIACE-Adult-Participation-in-Learning-Survey-Headline-Findings.pdf>

29 Tuckett, A. and Field, J. 2016. *Factors and motivations affecting attitudes towards and propensity to learn through the life course*. Foresight, Government Office for Science: https://dera.ioe.ac.uk/29182/1/Skills_and_lifelong_learning_-_attitudes_to_learning.pdf

30 L&W. 2018. *ESOL Funding and Participation Roundtable: Summary*; Pennacchia, J., Jones, E. and Aldridge, F (L&W). 2018. *Barriers to Learning for Disadvantaged Groups: Report of Qualitative Findings*. Department for Education: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735453/Barriers_to_learning_-_Qualitative_report.pdf

A more detailed breakdown of motivations to learn within the 2017 survey showed that around a quarter of respondents said they started learning to develop themselves as a person (27%); to help improve in their job (27%); due to an interest in the subject (26%); or to get a recognised qualification (24%). A further fifth of learners (22%) said they were learning because they enjoy it.

Where do adults learn? Adult learners in the 2017 survey were learning in a range of different locations. Excluding those in full-time education, learners were most likely to say they did their learning on a training course at work (23%), independently (20%), on the job (19%) or through a university, higher education institution or the Open University (16%).

What do adults learn? The 2017 survey showed that adults were learning a wide range of subjects and skills, including health and science; digital, computer skills and IT; business and administrative; creative and design; and childcare and education.

Around two-thirds (67%) of learners were working towards a qualification, with younger adults most likely to be doing so – more than nine out of 10 learners aged 17–24 said their learning would result in a qualification.

What are adults' barriers to learning? The most frequently cited barrier to learning was work or other time pressures. Adults who had engaged in learning in the previous three years identified particular challenges around situational barriers such as cost, caring responsibilities and availability of suitable childcare.

Adults who have not engaged in learning for at least three years were more likely to cite dispositional barriers, such as feeling too old and a lack of interest. Nearly two out of five (38%) said that they were not able to identify any specific barriers that were preventing them from learning, indicating that this not something they have considered or that they feel would be of value for them.

What might encourage adults to learn in the future? When asked about what would make them more likely to participate in the future, more than one in ten adults said that they would be more likely to take up learning if it was cheaper or the fees were lower (12%), if it was related to something that they were interested in (12%) or if they could learn from home (11%). However, almost two-fifths (38%) of adults said that nothing would make them more likely to take up learning, suggesting the need for more to be done to communicate the value and relevance of learning.

What are the benefits of learning? In the 2017 survey, almost two-fifths (37%) of learners identified an improvement in knowledge of the subject as a benefit after learning. Just under a third (31%) stated that they have improved the skills needed to do their job, and almost a quarter reported that their self-confidence has improved (24%), that they are more confident at work (23%) or that they enjoy learning more (22%). Only one in ten learners (11%) stated that they had not yet experienced any benefits or changes

3. ENGAGEMENT IN LEARNING AT KEY TRANSITIONS

Being motivated to learn, and learning being made easy or easier to engage with, are not always sufficient for learning to happen. Instead, learning is often triggered by a specific event or change in circumstance that leads people to take action at that point in time.

While a wealth of evidence exists on educational disadvantage in general, much less is known about adults' experiences at particular transition points in life. To make a distinctive contribution to the evidence base, this research aims to explore the relationship between engagement in adult learning and key life transitions.

Given our broad understanding of the educational disadvantages that older adults face, and the disadvantage that women returners experience in the labour market, the study focused on exploring the motivations for, barriers to, and experiences of learning for adults who were: approaching retirement

3.1 Transition into and through retirement

Our population is ageing. By 2030, the number of people in England aged 60 and over is set to increase by 50 per cent.³¹ In response to the challenge of an ageing society, government has

31 Hyde, M. and Phillipson, C. 2014. *How can lifelong learning, including continuous training within the labour market, be enabled and who will pay for this? Looking forward to 2025 and 2040 how might this evolve?* Government Office for Science: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/463059/gs-15-9-future-ageing-lifelong-learning-er02.pdf

sought to promote 'extended' or 'fuller' working lives,³² with a range of policy developments, including the development of mid-life reviews³³ or MOTs³⁴ to support older adults to make the most of their later working lives and to work towards a positive 'retirement' and later life. The promotion of lifelong learning and opportunities to upskill and retrain, forms a growing part of this agenda, as does a focus on the role that learning can play in maintaining physical and mental health and wellbeing into older age.³⁵

The evidence is clear. Participation in adult learning can play a key role in supporting longer working lives and maintaining health and well-being in later life. Despite this, participation is at an all-time low, and has been shown to decline significantly with age.³⁶

32 DWP. 2014a. *Fuller Working Lives: A Framework for Action*. London: HMSO: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/458861/fuller-working-lives.pdf; DWP. 2014b. *Fuller Working Lives – Background Evidence*. London, HMSO: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/319948/fuller-working-lives-background-evidence.pdf

33 Watts, J. et al. 2015. *Mid Life Career Review: Pilot Project Outcomes: Phases 1, 2 and 3* (2013–2015). NIACE: <https://www.learningandwork.org.uk.gridhosted.co.uk/wp-content/uploads/2017/01/MLCR-Final-Report.pdf>

34 Cridland, J. 2017. *Smoothing the Transition: Independent Review of the State Pension Age*. Department for Work and Pensions: <https://www.gov.uk/government/publications/state-pension-age-independent-review-final-report>

35 L&W. 2017. *Healthy, Wealthy and Wise*: <https://www.learningandwork.org.uk/wp-content/uploads/2017/01/LW-EU-Report-Nov-2017-V8.pdf>

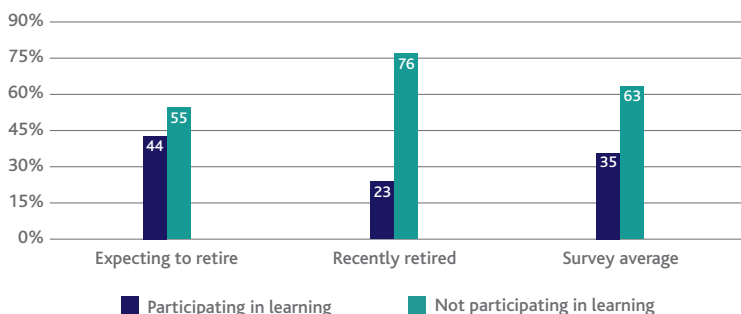
36 See L&W data charts which show the rate of adult participation in learning: <https://www.learningandwork.org.uk/our-work/promoting-learning-and-skills/participation-survey/rates-of-adult-participation-in-learning/>

L&W Adult Participation in Learning Survey

Transition into and through retirement: Learning status

- While in general, participation in learning declines with age, those who expect to retire in the next three years (44%) are significantly more likely to be learning than the overall population (35%).
- In contrast, fewer than one quarter (23%) of adults who have recently retired are participating in learning.

Figure 3: Learning status



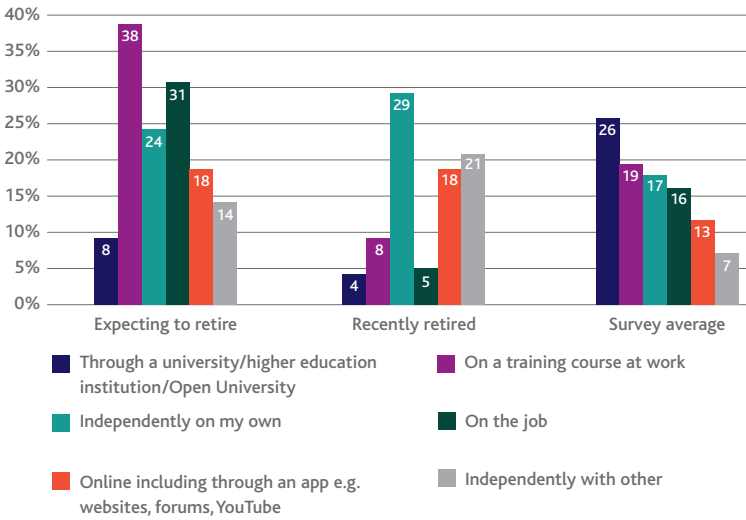
Base: All respondents = 5,060. Expecting to retire = 243, Recently retired = 516

Note: 1% of those expecting to retire and 2% of the overall population said they 'didn't know' their learning status.

Transition into and through retirement: How adults are learning

- Learners who are expecting to retire in the next three years are most likely to be undertaking their learning on a training course at work (38%) or on the job (31%).
- Recently retired learners are most likely to be learning independently on their own (29%) or independently with others (21%).
- Learners who are expecting to retire (8%) or recently retired (4%) are much less likely than adult learners in general (26%) to be studying at a university or higher education institution, but more likely to be learning online (18% cent compared to an average of 13%).

Figure 4: How adults are learning



Base: All learners = 1,747, Expecting to retire 108, Recently retired = 118

Note: Respondents were able to select more than one response. This figure shows the most common methods of learning.

3.1.1 Motivation to learn

For some adults going into and through retirement, a work orientation remains strong, with self-employment, part-time or occasional work a feature of their retired lives.³⁷ In these instances, ongoing access to work-related learning may be considered of value. For others, however, interest in learning is more orientated toward leisure activities, remaining socially engaged or developing non-work-related skills and competencies, often through more informal provision.³⁸

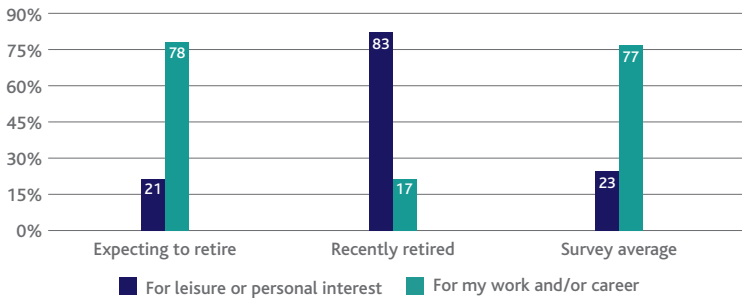
37 Smeaton, D., Di Rosa, M., Principi, A. and Butler, Z. 2018. Reverse retirement—a mixed methods study of returning to work in England, Italy and the United States: propensities, predictors and preferences. *International Journal of Ageing and Later Life*, 12(1), pp. 5–40.

38 Principi, A., Santini, S., Socci, M., Smeaton, D., Cahill, K.E., Vegeris, S. and Barnes, H. 2016. Retirement plans and active ageing: Perspectives in three countries. *Ageing & Society*, 38(1), pp. 56–82: https://www.cambridge.org/core/services/aop-cambridge-core/content/view/8E3C3CEEC9B2F5519752431EFEE0454A/S0144686X16000866a.pdf/retirement_plans_and_active_ageing_perspectives_in_three_countries.pdf

Transition into retirement: motivation

- The recently retired (83%) are much more likely to say that they are primarily learning for leisure, rather than work-related reasons, than adults in the overall sample (23%).

Figure 5: Main motivation for learning: Work-related vs leisure/personal interest



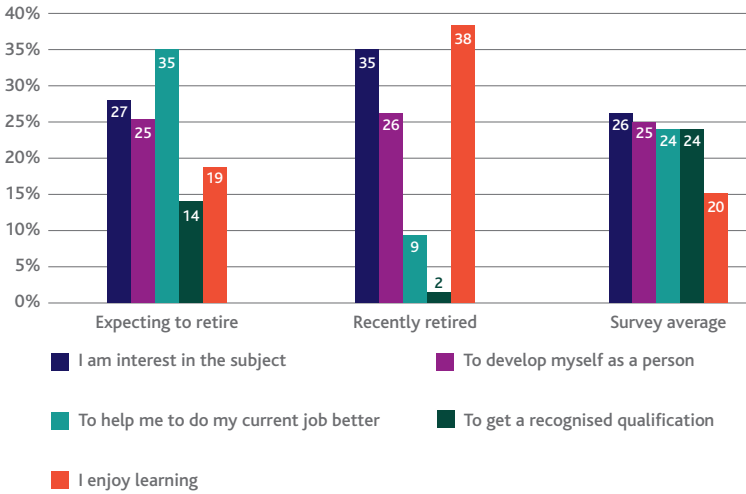
Base: All learners = 1,747. Expecting to retire = 108, Recently retired = 118

Note: 1% of those expecting to retire selected 'don't know'

Figure 6 shows a breakdown of the five most common motivations by each group.

- Overall, adults are most likely to be learning because of an interest in the subject (26%). This was followed by a desire to develop as a person (25%), to help them do their current job better (24%), to get a recognised qualification (24%) and out of enjoyment of learning (20%).
- The recently retired were much less likely to be learning in order to help them to do their job better (9%) or gain a professional qualification (2%), and much more likely to be learning out of interest in the subject (35%) or for enjoyment (38%)
- Those expecting to retire were more likely than average to be learning to help them do their current job better (35%), while only 14 per cent were motivated by the prospect of gaining a qualification.

Figure 6: Motivation for learning



Base: All learners = 1,747. Expecting to retire = 108, Recently retired = 118

3.1.2 Barriers to learning

Cost and course availability can be key barriers to learning faced by adults at this transition, particularly for those living in rural areas.³⁹

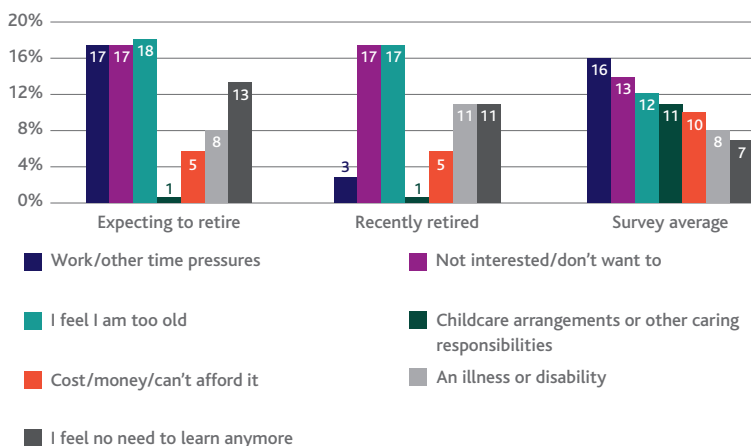
Transition into and through retirement: Barriers to learning

- When asked about barriers to learning, adults who have not engaged in learning during the previous 3 years are most likely to cite work and time pressures (16%), lack of interest (13%), feeling too old (12%), caring arrangements (11%) and cost (10%).
- Adults going into and through retirement are much more likely to cite feeling too old as a barrier to learning. This was the most commonly identified barrier for adults expecting to retire in the next three years (18%) and the joint most common barrier for recently retired adults (17%).

³⁹ Ibid.

- Work and other time pressures (17%), a lack of interest in learning (17%) and feeling no need to learn anymore (13%) are also key considerations for those expecting to retire in the next three years.
- In addition to feeling too old to learn, recently retired adults cite their main barriers to learning as being a lack of interest (17%), having an illness or disability (11%) and not feeling the need to learn anymore (11%).

Figure 7: Barriers to learning



Base: All adults not currently or recently learning = 3,162, Expecting to retire = 133, Recently retired = 394

Note: Survey average responses under 3% have been excluded from the table. Respondents were able to select more than one response. Respondents who selected 'no barrier' are not included.

3.1.3 Benefits of learning

Participation in lifelong learning can bring a variety of benefits and is associated with higher levels of life satisfaction,⁴⁰

40 Vorhaus, J., Duckworth, K., Budge, D. and Feinstein, L. 2008. *The social and personal benefits of learning: A summary of key research findings*. Centre for Research on the Wider Benefits of Learning, Institute of Education: London.

heightened subjective well-being⁴¹ and increased confidence.⁴² Learning can also promote self-efficacy,⁴³ helping individuals during the retirement transition to feel more in control of changes in their life and thereby more readily able to adjust.

Learning can be a key way to remain socially engaged and active in body and mind. For many, moving into retirement can raise concerns about the final stage of life. Learning is perceived to play a role in reducing these concerns, supporting adults to start something new.⁴⁴

Learning in later life can also bring benefits to the wider community. Older people's participation in lifelong learning through cultural activities, such as volunteering at museums or visiting historical sites, can help keep traditions such as heritage crafts alive for future generations to enjoy.⁴⁵ While 'active, healthy and well-informed, older adults are less likely to place demands on family and community resources and services'.⁴⁶

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- 41 Moody, H.R. 2004. Structure and agency in late-life learning. *Old Age and Agency*. Nova Science Publishers: New York; Hammond, C. and Feinstein, L. 2006. *Are those who flourished at school healthier adults? What role for adult education?* [Wider Benefits of Learning Research Report No. 17]. Centre for Research on the Wider Benefits of Learning; Jenkins, A. 2009. *Adult learning, mental health and wellbeing among older adults*, Evidence from ELSA Report for the Inquiry into Lifelong Learning, Centre for Research on the Wider Benefits in Learning. Institute of Education: London.
- 42 Dench, S. and Regan, J. 2000. *Learning in Later Life: Motivation and Impact*. Department for Education and Employment; Schuller, T., Preston, J., Hammond, C., Brassett-Grundy, A. and Bynner, J. 2004. *The benefits of learning: The impact of education on health, family life and social capital*. Routledge; Preston, J. and Hammond, C., 2003. Practitioner views on the wider benefits of further education. *Journal of Further and Higher Education*, 27(2), pp. 211–222.
- 43 Richeson, N.E., Boyne, S. and Brady, E.M. 2007. Education for older adults with early-stage dementia: Health promotion for the mind, body, and spirit. *Educational Gerontology*, 33(9), pp. 723–736; Formosa, M. 2012. Education and older adults at the University of the Third Age. *Educational Gerontology*, 38(2), pp. 114–126.
- 44 Principi, A., Santini, S., Socci, M., Smeaton, D., Cahill, K.E., Vegeris, S. and Barnes, H. 2016. Retirement plans and active ageing: Perspectives in three countries. *Ageing & Society*, 38(1), pp. 56–82.
- 45 Grut, S. 2013. The Challenge of Ageing Populations—Assessing the Contribution of Heritage and Creative Learning. Creativity, *Lifelong Learning and the Ageing Population*, pp. 29–31.
- 46 Hyde, M. and Phillipson, C. 2014. *How can lifelong learning, including continuous training within the labour market, be enabled and who will pay for this? Looking forward to 2025 and 2040 how might this evolve?* Government Office for Science: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/463059/gs-15-9-future-ageing-lifelong-learning-er02.pdf

3.1.4 Engaging and supporting learners

Those on the cusp of retirement have observed how little support they receive and that most retirement-planning sessions tend to be overly focused on the financial aspects of retirement.⁴⁷ In a study of retirement transitions,⁴⁸ a widespread lack of both preparedness and planning for retirement was found, concluding that there is considerable need for investment in courses for retirement that go beyond the traditional focus on financial planning and which also take account of the impact of retirement on social, psychological and emotional wellbeing.

Third-sector organisations provide a range of advice and guidance for adults approaching retirement, including on the acquisition of digital skills and on learning more broadly. For example, Age UK⁴⁹ suggests engaging in an evening class as a means of building social networks and encourages people to 'grasp technology' to enable them to keep in touch with family all over the world and learn new things.

In 2012, L&W's predecessor organisation NIACE, ran a three-year Mid Life Career Review (MLCR) programme exploring the demand for a career review among over 3,000 employed and unemployed adults aged 45–65 and investigated the costs and benefits of such a service. The programme, which was designed to support adults in mid-life to review their opportunities and aspirations for work and learning in the context of their life circumstances, showed that a career review can have a clear and positive impact on a wide range of people. Benefits of a MLCR included helping older people return to employment, find appropriate training, make realistic decisions about extending their working lives and

47 Smeaton, D., Di Rosa, M., Principi, A. and Butler, Z. 2018. Reverse retirement—a mixed methods study of returning to work in England, Italy and the United States: propensities, predictors and preferences. *International Journal of Ageing and Later Life*, 12(1), pp. 5–40.

48 Hyde, M., Cheshire-Allen, M., Damman, M., Henkens, K., Platts, L., Pritchard, K. and Reed, C. 2018. *The experience of the transition to retirement: Rapid evidence review*. London, Centre for Ageing Better: <https://www.ageing-better.org.uk/sites/default/files/2018-12/Transition-to-retirement.pdf>

49 Age UK. 2019. *Preparing Emotionally for Retirement*: <https://www.ageuk.org.uk/information-advice/work-learning/retirement/preparing-emotionally-for-retirement/>

improve their health and wellbeing. Using a person-centred, holistic approach that considers the individual's whole life, MLCRs take into account not only their employment and learning needs, but also their life circumstances.⁵⁰

Based on these findings, the initiative was a key focus in Cridland's recent Independent Review of the State Pension Age, which recommended that it be built on and broadened to a Mid-Life MOT.⁵¹ Reviews at this life stage are particularly required due to factors such as age-based discrimination in the labour market and the raising of the state pension age and the abolition of compulsory retirement ages. The Fuller Working Lives team in the Department for Work and Pensions is currently working to develop a range of support options that match the aspirations or needs which people identify will help them to stay in work and progress positively into later life.

The acquisition of financial and digital skills later in life has been particularly emphasised, in order to ensure that during the transition to retirement adults are able to benefit from an increasingly digital world and make appropriate choices for their long-term financial wellbeing.

3.2 Transition back to work after caring for children

There is increasing concern that taking a career break to care for children impacts on parents' future career opportunities. Although this is an experience relevant to both men and women, it is a heavily gendered issue, with women disproportionately affected. Women with children are much less likely than men to be in employment, with only 65 per cent of mothers working three

50 Richeson, N.E., Boyne, S. and Brady, E.M. 2007. Education for older adults with early-stage dementia: Health promotion for the mind, body, and spirit. *Educational Gerontology*, 33(9), pp. 723–736; Formosa, M. 2012. Education and older adults at the University of the Third Age. *Educational Gerontology*, 38(2), pp. 114–126.

51 Cridland, J. 2017. *Smoothing the Transition: Independent Review of the State Pension Age*. Department for Work and Pensions: <https://www.gov.uk/government/publications/state-pension-age-independent-review-final-report>

years after having their last child. Mothers (55%) are also more likely than fathers (6%) to be working part-time.⁵²

Women who do return to the labour market, face a range of challenges and penalties. These include finding it hard to combine a successful career with caring responsibilities; working below their potential; and being more likely to move into lower-skilled or lower-paid roles, experiencing an immediate earnings reduction of up to a third.⁵³

Returning mothers identify one of the main barriers to work as a lack of qualifications and experience to be able to compete with others in the job market.⁵⁴ Supporting returners to gain further qualifications would give those with little or no prior qualifications more flexibility to pursue paid work which suits their needs. This is particularly important given that those with fewer or no formal qualifications are least likely to be learning,⁵⁵ resulting in more limited employment options as children become older.

L&W Adult Participation in Learning Survey

Returning to work: Learning status

- Adults with childcare responsibilities have a higher rate of participation in learning than the UK population as a whole, though this is likely to be influenced by their age profile.
- Among those with caring responsibilities, adults who are in work are more likely to be learning (42%) than those who are outside the labour market (30%).

52 Gicheva, N. and Keohane, N. 2018. *Back on Track: Making the Most of Parents' Working Lives*. Social Market Foundation: <http://www.smf.co.uk/wp-content/uploads/2018/06/Back-on-Track-full-report.pdf>

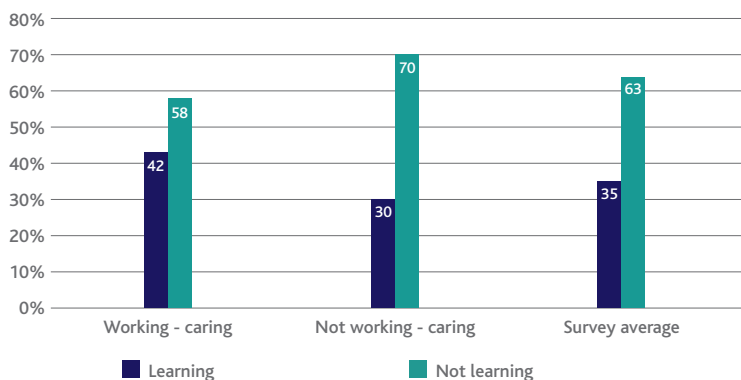
53 PWC. 2016. *Women Returners*: <https://www.pwc.co.uk/economic-services/women-returners/pwc-research-women-returners-nov-2016.pdf>

54 Knudsen, L. and Bradshaw, P. 2017. *Growing Up in Scotland: Patterns of maternal employment and barriers to paid work*. Scottish Government: <https://www.gov.scot/publications/growing-up-scotland-patterns-maternal-employment-barriers-paid-work/pages/2/>

55 Government Office for Science, Foresight. 2018. *Future of Skills and Lifelong Learning*: <https://www.gov.uk/government/publications/future-of-skills-and-lifelong-learning>

- Women (80%) are more likely than men (20%) to have caring responsibilities. 76% of those who are caring but not working are women; as are 85 per cent of those who are combining both work and caring responsibilities.

Figure 8: Learning status

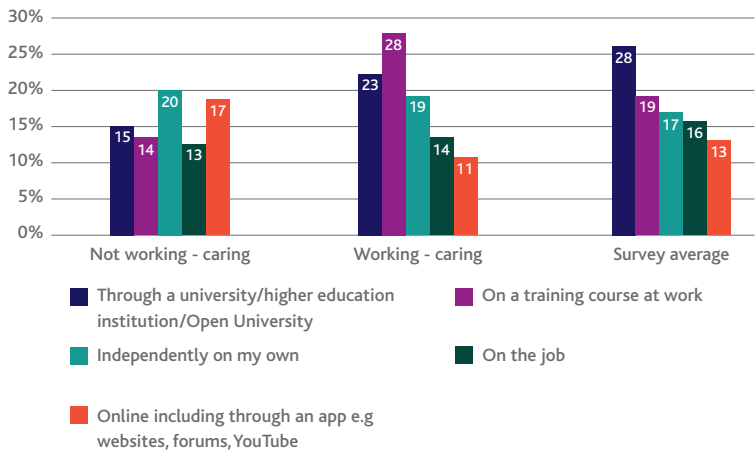


Base: All respondents = 5,060, Working – caring (N.B. includes: P/T working – caring and recently returned having cared) = 231, Not working – caring (N.B. includes, not working – caring and considering returning – caring) = 295. N.B. 2% of the overall population said they 'didn't know' their learning status.

Returning to work: How adults are learning

- The ways in which adults learn change as they return to the labour market having taken time out to care for children, becoming more likely to learn through a university or other higher education institution (+8 percentage points) or a training course at work (+14pp) and less likely to learn online (-6pp).
- Adults who are caring but not working (including those considering returning to work) are most likely to be learning independently on their own (20%) and online (17%).
- Those who had returned to work were most likely to be learning on a training course at work (28%), or through a university or higher education institution (23%).

Figure 9: How adults are learning



Base: All learners = 1,747, Not working – caring = 88, Working – caring = 96

Note: Respondents were able to select more than one response.

Note: 14% of those not working and caring said they learned on a training course at work, and 13% said they learned on the job. This is because their learning can have taken place up to three years prior to giving their responses.

3.2.1 Motivation to learn

A US literature review⁵⁶ found that women’s goals and purposes for learning on re-entry to the labour market included:

- Increased confidence and self-esteem
- Networking with other women
- Job search skills

Among returners, the relative importance of these motivations may differ according to the age, education, family background and economic background of individual women. For instance, one study⁵⁷ found that women returners who have lower education levels re-joined the paid workforce primarily for the purpose of

56 Greer, T.W. 2013. Facilitating Successful Re-entries in the United States: Training and development for women returners. *New Horizons in Adult Education and Human Resource Development*, 25(3), pp. 41–61.

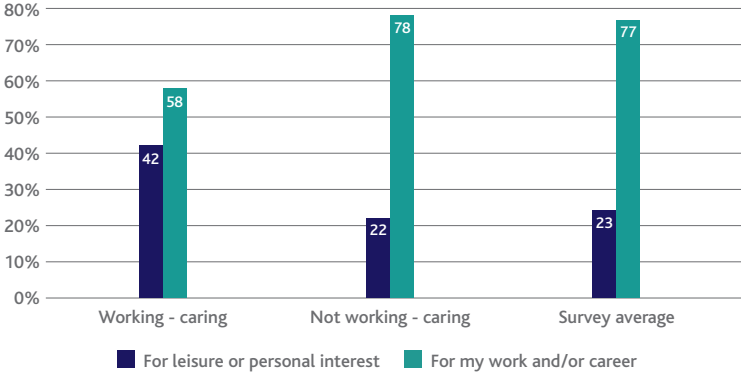
57 Doorewaard, H., Hendrickx, J. and Verschuren, P. 2004. Work orientations of female returners. *Work, employment and society*, 18(1), pp. 7–27.

earning money; while women returners with higher education levels and who were financially comfortable were more likely to return to paid work for 'job' reasons. Older women returners were more likely to cite 'people' reasons for returning to the paid workforce. Appealing to these motivations is important for re-entry training programs to attract, engage, and benefit women returners.

Returning to work: Motivation to learn

- Returners, both those in work as well as those outside of the labour market, are more likely to be learning primarily for work-related reasons, rather than for leisure or personal reasons. Personal interest is the main motivator for 58% of those who are not working and 22% of those in work.

Figure 10: Main motivation for learning: Work-related vs leisure/personal interest



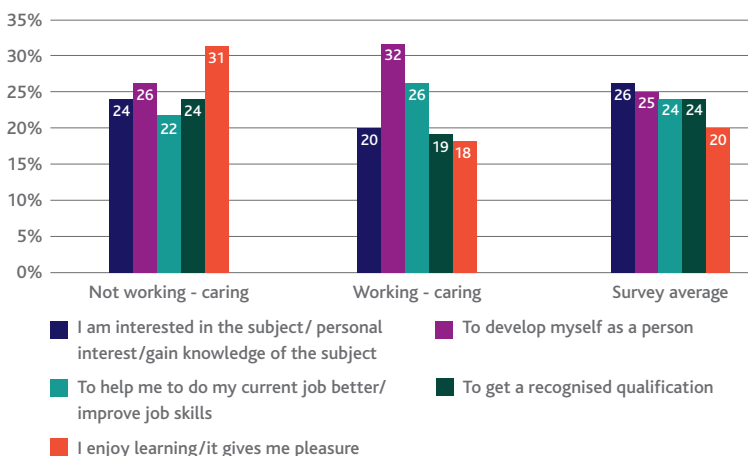
Base: All learners = 1,747, Not working – caring = 88, Working – caring = 96

- Adults are most likely to be learning out of interest in the subject (26%), to develop as a person (25%), to help them do their current job better (24%), to get a recognised qualification (24%) and out of enjoyment of learning (20%).
- Those with caring responsibilities who are not working are more likely to be learning for enjoyment (31%), for

personal development, (26%), out of interest (24%) and to get a recognised qualification (24%).

- Those who had returned to work are much more likely to learn for personal development (32%) and to help them do their job better (26%), and less likely to be learning out of personal interest (20%), to get a qualification (19%) or out of enjoyment (18%).

Figure 11: Frequently cited motivations for learning



Base: All learners = 1,747, Not working – caring = 88, Working – caring = 96

Note: Respondents were able to select more than one response.

3.2.2 Barriers to learning

Evidence suggests that returners face a range of barriers and challenges affecting their decision to engage in, and their experience of, learning as an adult:

- **Fee costs**⁵⁸ particularly for those with lone parent status or who depend on one wage. The Women and Equalities Committee⁵⁹ have recently raised concerns about the 'decline in funding in further education and adult skills in recent

⁵⁸ Walby, S. and Olsen, W. 2002. *The impact of women's position in the labour market on pay and implications for productivity.*

⁵⁹ The Women and Equalities Committee. 2016. *Second Report of Session 2015–16, Gender Pay Gap.* House of Commons:

years' and the impact on women over the age of 40 who may be returning to the labour market after having their second or third child in particular.

- **Hidden costs** such as a lack of affordable, high-quality childcare and being unable to complete courses full-time. Childcare is necessary not only for contact hours but also for independent study, and research shows that having children impacts the ability of mothers, in particular, to successfully study. Overall, having a family has been found to be a 'catalyst' for other barriers to learning.⁶⁰
- **Attitudinal barriers/social and cultural norms.**⁶¹ Entry into higher education presents different levels of risk for older female students when compared to those of men. These include social issues derived from being a caregiver and a student, not least the need to coordinate learning around the responsibilities of caring for family and home. Research with female learners with children found that women can feel guilty about accessing learning opportunities because they subtract time from their maternal responsibilities.⁶²
- **Lack of tailored support.** Returners need support to retrain and update their skills, including careers information and advice. However, research shows that the support, advice and funding available is largely focused on low-skilled jobs and does not target or appeal to adult learners.⁶³

60 Pennacchia, J., Jones, E. and Aldridge, F. 2018. *Barriers to Learning for Disadvantaged Groups: Report of Qualitative findings*. Learning and Work Institute. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735453/Barriers_to_learning_-_Qualitative_report.pdf

61 Summarised in O'Shea, S. 2015. "I generally say I am a mum first... But I'm studying at uni": The narratives of first-in-family, female caregivers transitioning into an Australian university. *Journal of Diversity in Higher Education*, 8(4), p. 243.

62 Reay, D. 2003. A risky business? Mature working-class women students and access to higher education. *Gender and Education*, 15(3), pp. 301–317.

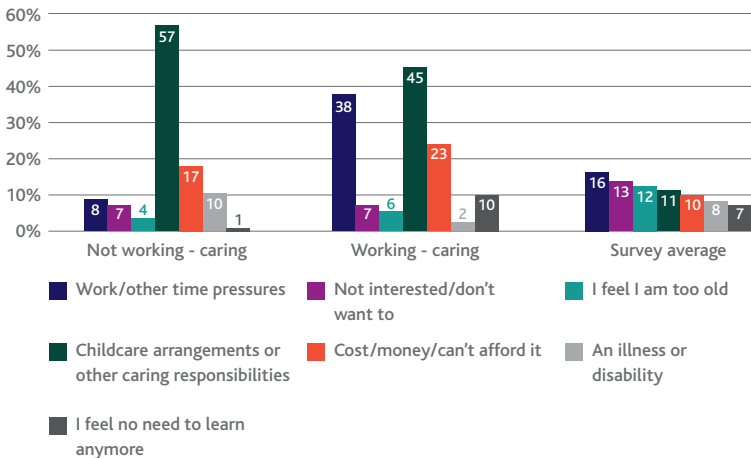
63 Kendall, S. 2018. *Analysis of responses to the call for evidence on returning to work after time out for caring*. Government Equalities Office: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/694470/GEO-Final_Return_to_Work_after_Caring_Report__Call_for_Evidence_.pdf

Returning to work: Barriers to learning

When asked about barriers to learning, returners who have not engaged in learning during the previous three years are most likely to cite work and time pressures (16%), lack of interest (13%), feeling too old (12%), caring arrangements (11%) and cost (10%).

- Those with caring responsibilities who are not working are significantly more likely (57%) than the overall sample to cite childcare arrangements as a barrier to learning.
- For those in work, childcare arrangements (45%), work/ other time pressures (38%) and cost (23%) are the most pressing barriers to learning.
- Overall, for women, childcare arrangements (16%) was a much more pressing barrier than for men (5%).

Figure 12: Barriers to learning



Base: All adults not current or recently engaged in learning = 3,162, Not working – caring 207, Working – caring = 133

Note: Respondents were able to select more than one response. Respondents that selected 'no barrier' are not included.

3.3.3 Engaging and supporting learners

Research shows that those who are returning to work after taking time out to care for children often have specific support needs that must be addressed in order to facilitate successful participation in learning.

This means going beyond initial engagement activities, to also consider what learning opportunities are most suitable and accessible for returners, and how returners can best be supported to achieve and progress in learning.

Research involving women returners found that support was necessary to overcome the lack of skills and self-confidence which can act as a barrier to many women returners in relation to both education and work.⁶⁴ However, a recent government call for evidence about returning to work after caring identified that the main challenge in relation to upskilling or retraining was that support and advice is predominantly focused on young people and those in low-skilled jobs.⁶⁵ Similarly, funding to update skills and qualifications tends to be focused on young people or the unemployed.

A key policy recommendation from the Social Market Foundation's report exploring the impact of parenthood on the work outcomes of mothers and fathers was that the government explore funding free post-career break reviews for parents who have taken career breaks of five or more years.⁶⁶ This is intended to overcome some of the specific barriers facing returners by identifying appropriate learning and/or employment

64 Holdsworth, J., Clisby, S., Fairbank, A., and Miles, H. 2007. *Breakthrough: Researching gendered experiences of education and employment in Yorkshire and Humberside*. Report 3, European Social Fund in conjunction with Research Papers in Social Sciences and Policy, University of Hull. <https://www.purplehouse.co.uk/wp-content/uploads/2018/09/Breakthrough3.pdf>

65 Kendall, S. 2018. *Analysis of responses to the call for evidence on returning to work after time out for caring*. Government Equalities Office: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/694470/GEO-Final_Return_to_Work_after_Caring_Report__Call_for_Evidence_.pdf

66 Gicheva, N., and Keohane, N. 2018. *Back on Track: Making the Most of Parents' Working Lives*. Social Market Foundation. <http://www.smf.co.uk/wp-content/uploads/2018/06/Back-on-Track-full-report.pdf>

opportunities. This support should be available from the beginning of the period of caring and continue through into the return to employment. Returners wanted practical support in terms of how to explain gaps in their CV, how to obtain references and complete online application processes. They also identified a lack of training to bring skills up to date and a lack of funding for retraining or to update skills as issues for women returners.

The recent APPG Women and Equalities Committee consultation suggested that a coherent approach to supporting women returners was needed, rather than simply expecting them to find, and pay for, the right training opportunities for themselves.⁶⁷

The solutions proposed included: women returner schemes; apprenticeships for adult workers; and improving careers advice and guidance for adults. The report highlights the role that specific women returner schemes could play in helping women back into work. There is clearly a current policy interest in returnship initiatives. The Government Equalities Office produced a guidance document in 2018 for employers on how to offer such training to workers/potential workers.⁶⁸ Flexible job design, a strong support framework – including a supportive line manager – are highlighted as key to the success of such programmes. However, there is concern that such activities are only targeted at higher skilled women and those in senior professional-level positions. It is perhaps not surprising therefore that a report by the APPG highlights that women on low incomes or women with mid-level positions are not covered by the majority of returnship initiatives.⁶⁹

However, women returners will require different messaging and approaches than traditional apprentices. For example, the lack of

67 All Party Parliamentary Group. 2016. *Women Returners: Annual Report*: <https://connectpa.co.uk/wp-content/uploads/2017/01/Women-and-work-Annual-report-low-res.pdf>

68 Timewise and Women Returners. 2018. *Returner Programmes: Best Practice Guide for Employers*. Government Equalities Office: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/685064/Returner_Programmes_-_Best_Practice_Guidance_for_Employers.pdf

69 All Party Parliamentary Group. 2016. *Women Returners: Annual Report*: <https://connectpa.co.uk/wp-content/uploads/2017/01/Women-and-work-Annual-report-low-res.pdf>

part-time and flexible options for apprenticeships is a significant barrier for women, particularly those with caring responsibilities.

Given this, L&W and Timewise propose that an effective flexible and part-time apprenticeship programme should work closely with employers and employees, communicate the demand and benefits of flexible and part-time apprenticeships among employers, providers and potential apprentices, ensure that the apprenticeship offer is suitable to the individual, of high quality and offers real progression opportunities, and pay apprentices at least the Living Wage or London Living Wage.⁷⁰ A recent report by the Social Market Foundation recommends that women returners become one of the target groups under the government's widening access policies for apprenticeships and through the Institute of Apprenticeships and Technical Education considering developing part-time apprenticeships for returners.⁷¹ This recommendation builds on findings from L&W and Timewise about a lack of understanding of part-time apprenticeships.⁷² It also highlights the results of a scheme in Camden which found that part-time flexible apprenticeships were a useful way of bringing parents back into the workplace.⁷³

To overcome some of the barriers around childcare, the literature raises the issue of whether distance learning could be a viable and useful option for women returners. Online learning has been found to be a useful option for some mothers in the UK

70 Learning and Work Institute and Timewise Foundation. 2018. *Exploring Models for Part-time and Flexible Apprenticeships*. Learning and Work Institute and Timewise Foundation: https://www.youngwomenstrust.org/assets/0000/8848/Part-time_and_flexible_apprenticeships_report_LWI_TW.pdf

71 Gicheva, N. and Keohane, N. 2018. *Back on Track: Making the Most of Parents' Working Lives*. Social Market Foundation: <http://www.smf.co.uk/wp-content/uploads/2018/06/Back-on-Track-full-report.pdf>

72 Learning and Work Institute and Timewise Foundation. 2018. *Exploring Models for Part-time and Flexible Apprenticeships*. Learning and Work Institute and Timewise Foundation: https://www.youngwomenstrust.org/assets/0000/8848/Part-time_and_flexible_apprenticeships_report_LWI_TW.pdf

73 NEF Consulting. 2015. *Interim evaluation of an adult apprenticeship programme*. Camden Council, October 2015, cited in Gicheva, N. and Keohane, N. 2018.

because it overcomes both mobility and childcare issues.⁷⁴ Distance courses can provide peer support, encouragement, and social interaction necessary to support course retention.⁷⁵ However, while distance learning offers the illusion of increasing accessibility to learning, it also risks limiting opportunities to women with regular internet access and who are competent computer users, which may exclude lower-income women, lower-skilled women and women from rural areas.

74 Pennacchia, J., Jones, E. and Aldridge, F. 2018. *Barriers to Learning for Disadvantaged Groups: Report of Qualitative findings*. Learning and Work Institute. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735453/Barriers_to_learning_-_Qualitative_report.pdf

75 Greer, T.W. 2013. Facilitating Successful Re-entries in the United States: Training and development for women returners. *New Horizons in Adult Education and Human Resource Development*, 25(3), pp. 41–61.

4. UNDERSTANDING ADULT ENGAGEMENT IN LEARNING AT RETIREMENT AND RE-TURNER TRANSITIONS

As adults go through different life transitions, their priorities change, as do their circumstances – all of which impacts on both motivation to learn and the barriers and enablers that adults face in engaging in learning.

In order to better understand the interaction between engagement in learning and key life transitions, and build on the existing evidence, we undertook in-depth interviews with learners who were making the transition into retirement or back into work after caring for children. This was then supplemented with focus group discussions involving adults without this recent experience of learning.

4.1 Retirement

4.1.1 Priorities and motivation to learn

Learners going into and through retirement reflected that learning was now more important to them than it had been throughout earlier life stages, particularly in relation to helping achieve broader life goals and aspirations for retirement.

For some, retirement provided the first opportunity for them to engage in learning for its own sake, rather than for the benefit that it would bring to their working life. Learners discussed how they no longer had to work towards qualifications or specific work-related learning goals, unless this was important to them. Instead, they could pursue long held interests, or begin learning

new things because they felt that they would enjoy doing so. For example, one retired learner explained how they had taken up language learning in order to develop their appreciation of opera:

I think it's asking that question, 'What do I want out of my life in retirement?' and doing the thing I enjoy, one of them is learning. (Recently retired, current learner)

Learning was also seen as playing an instrumental role in this life transition in two keys ways. The first was providing an opportunity to socialise and meet new people. Some participants noted that leaving the labour market marks an end of being involved in social situations. Therefore, learning for this reason became more important than prior to retirement:

It is about keeping the contact going because when you finish work you lose contact with so many people so quickly. (Recently retired, recent learner)

This was particularly felt by one participant who was recently retired and single:

I'm doing a lot of courses because I want to make sure I'm not isolated as a single person, I'm so used to a busy work space and suddenly you're not, you're at home. One of the things is to get out and meet people. You meet more interesting people in educational settings and creative settings than you meet anywhere else, I think. (Recently retired, focus group participant)

One learner had initially taken up learning during a long stay in hospital as a way of spending time with new people and had specifically chosen a course on managing anxiety and depression to improve their interactions and develop relationships with other patients who also had these conditions.

The second was helping to keep their brain active, something that was cited as gaining importance during the transition into retirement:

I need to do it, basically I don't want my brain to get addled, I don't want to be bored. I enjoy the self-indulgence of learning and getting skills and I enjoy the fact that I can do it now because I want to, not because it's for work. (Recently retired, current learner)

In recognition of this, learners identified that different elements of the learning experience had now become more or less important to them. Learning to gain a qualification was generally considered to be less important whereas learning as a way of meeting new people and keeping your brain active was of greater priority.

As one retired learner described, their initial plan for retirement has been to do nothing, although this changed over time as they realised their need for structure and activity to keep them stimulated.

Doing nothing is not good enough, it's just... you can't do nothing. When we first came up, we did a lot of work on the house so that took up time. Eventually you think, I need something else, to do something. (Recently retired, recent learner)

4.1.2 Barriers and enablers to learning

Learners who were going into and through retirement noted a range of factors – both barriers and enablers – that influenced their take up of learning.

Time to learn

For many, the transition into retirement or semi-retirement was associated with having more time to engage with learning.

I think I'd be much more interested in doing it now than when I was actually working. I wasn't really interested, just too tired all the time. Then when it came to the weekend, I thought my weekend's my own. So now I've got more time I can really think...a bit more of a structured way about doing something like that. (Recently retired, Focus group participant)

Having more time to learn, acted as an enabler in two main ways. For some, retirement provided the opportunity and inspiration to

learn things that they had wanted to for a while. They described how work pressures and time spent working had meant that it was not feasible to engage in learning before they retired, but that this was now possible.

Five years ago, or so, when I did look into it for a different thing, maybe it was the wrong subject or something else was wrong. I didn't feel like the inspiration was there. The final push to get you to do this wasn't really there.

(Approaching retirement, recent learner)

Others alluded to more dispositional factors, whereby their change of circumstances now enabled them to take up learning, guilt-free:

Having the time now to be able to do it. That's the trigger, it's having the time and space to be able to go and sit behind the computer and not feel guilty that I should be doing other things. So, consequently, come retirement, I'm doing things for myself as well as with the family. The sorts of things that I wouldn't give up the time when I was working that I now do. So, it was having the time to do it.

(Recently retired, current learner)

In contrast, some learners were concerned about having too much time in retirement and were keen to fill their time and stay busy.

I had time, time that I've not had in a long, long time. And you've got to fill that time and you want to fill it with something that inspires you, interests you, you know, or you stagnate, sit and watch TV, what would you do, you know, read? Yes, I read but there has to be something that you do.

(Recently retired, recent learner)

Those in semi-retirement considered that they still lacked the time and energy necessary to pursue learning opportunities outside of work. Two learners were regularly required by their employer to take work-based courses to maintain their professional skills, leaving little appetite for personal learning. Another, who was in the process of planning their retirement, felt

unable to commit to formal learning as they did not know their work schedules in advance:

The job can be quite involving in that way and you feel when you go home you just want to switch off. (Approaching retirement, current learner)

Personal circumstances

While many noted that this life transition meant having more time because their children had grown up and left home, some had family commitments which affected their ability to engage in learning, particularly when they were balancing both eldercare and childcare responsibilities. Many had elderly parents or in-laws that required their support. One participant, who was single, supported her mother and son which hindered their ability to commit to learning:

Now my parents are getting old, and my husband's parents... well parent, mother, is very old and in a nursing home, we have unpredictable commitments. (Recently retired, current learner)

Health-related issues were less frequently cited, but where they were present could limit learning choices. One learner, who had retired early due to ill-health, found it difficult to access some courses because of mobility issues. For this learner, the availability of transport and physical support was an important consideration when making choices about learning:

My only concern was getting there because... someone needed to travel with me, and I had to go by taxi. (Recently retired, recent learner)

Similarly, one focus group member discussed how using computers for long periods was difficult as it resulted in sore eyes – something which would not have been a problem when they were younger. Such health or physical capability issues are likely to affect many retired people, particularly as they age.

Previous experiences of education

Some learners had spent a lifetime engaged in learning and training to support their careers. They naturally assumed that they would seek out learning opportunities when they retired. Others had seen the benefits of learning in the lives of their family or friends, or experienced this themselves, and were therefore committed to the idea of learning throughout their lives:

We've all gone through university as adults and we've all done... our lives have been, all of us have been able to do things which we wouldn't have been able to do had we not taken the step as adults to go to university. (Expecting to retire, current learner)

Cost

Cost is an important consideration for many adults who are deciding whether or not to engage on learning – and particularly so during life transitions, such as retirement, that have a significant impact on income.

There was a general perception that learning costs were too high or rising – prompting calls for discounts to be offered to retired learners. For some, the cost of specific courses was prohibitive; others had only been able to engage by choosing low-cost options such as self-study, short or subsidised courses.

Sometimes, very rarely, once in a blue moon, courses are subsidised. For example, tomorrow, I am doing a jewellery thing for two hours and I only paid £2. (Recently retired, Focus group participant)

Timing, duration and flexibility of offer

Despite identifying that retirement can often result in more time for learning, the timing, duration and flexibility of the offer remains important. Some adults – looking to align learning with wider schedules and preferences – were attracted only to

opportunities available during the daytime, while others were looking for availability in the evening.

Several learners noted that the flexibility of the offer had enabled them to participate, whereas a weekly commitment would be a hindrance to future engagement:

As soon as I have to go every Tuesday evening, I'll start thinking...I can't go that week and I can't go that week and the whole thing starts to fall apart. (Expecting to retire, current learner)

Course length was also considered important. Focus group participants discussed how retirement had resulted in less structure to their lives, leaving them less confident or willing to commit to a longer, more structured course:

The commitment thing is about not being used to a structure now so how easy it is to return to that kind of weekly activity. (Recently retired, Focus group participant)

Lack of information

Adults are more likely to engage in learning if they know what courses are available, or indeed know where to find such information; those facing retirement transitions are no exception to this. One recently retired learner noted how they had initially been deterred by not knowing where to look, but had subsequently received a leaflet through their door, which enabled them to take up learning:

It put me off because, you know, I don't know where to start looking. I know they say the library is the best place to maybe go and look and we did go down there at the beginning but didn't see anything. (Recently retired, recent learner)

A number of interviewees and focus group participants described how they had been unable to find any suitable courses in their local area; although a number had taken steps to teach themselves about a particular area of interest in the absence of a taught course.

Social drivers

For some learners the social aspect of learning – being with others, finding likeminded individuals and meeting new people – was the primary driver of their learning. For others, this was a cause of concern. Echoing our survey findings that ‘feeling too old’ is a common barrier to learning for retired adults, some learners had been concerned about studying alongside people who were much younger than them, and whether they would be able to keep up.

People are on these things to start their careers so you're in there with a lot of 18-year olds and it's going to cost a fortune and that's kind of difficult, because the things that I really want to do are like that, they're academic courses.

(Recently retired, current learner)

Basically, about self-confidence, yes, because you've been away for so long. The kids that I'm around, I do voluntary courses for them. They are so quick, they're so fast these days because you ask them something, they're just on it.

(Semi-retired, Focus group participant)

Psychological capability

A small number of learners were planning to use their existing skills in voluntary roles and had engaged in learning to help them do this. They were keen not to ‘stagnate’, but to ensure that existing skills and knowledge were kept up to date, and even develop them further:

You can stagnate if you're not careful. We're a long time retired. (Recently retired, recent learner)

For example, one retired teacher had enrolled on a course to learn to teach adults. Another wanted to continue to use their presentation skills and was learning in order to present on an entirely new topic. Their confidence in their existing skill set and desire to continue to use these skills and knowledge in retirement was a compelling driver in their decision to engaging in learning.

In contrast, some felt that their capabilities had, or might have, deteriorated as they got older. This changing assessment of

their abilities affected their willingness to learn and/or the type of learning options they would consider. For example, one independent learner was keen to engage in more formal provision, but expressed doubts over their ability to remember information:

I'm at the point now when I need to do a more formal class, but my problem is that now I'm getting older, my memory isn't too brilliant and I learn all of this stuff and I go back to it and think, 'I've forgotten half of this, I'm going to have to learn it again', and then read it all through again. So, it's better really to be able to pace myself at my own speed.

(Recently retired, current learner)

Focus group participants echoed this perception, discussing the extent to which diminishing capabilities and time out of learning could affect their ability to engage in learning:

Not having studied for such a long time and getting back into it then can one do it again? (Recently retired, Focus group participant)

4.1.3 Outcomes and benefits of learning

Learners who were going into and through retirement noted a range of factors – both barriers and enablers – that influenced their take up of learning.

Perhaps reflecting the goals and aspirations associated with the transition into and through retirement, these learners experienced a range of outcomes and benefits to their learning.

Sense of self and purpose

In the absence of work, learners had benefitted from their engagement in something tangible, often contributing to their sense of self and self-worth.

Several retired learners spoke about how their learning had provided them with a sense of purpose after finishing work. One person had specifically used learning to support their voluntary work and had gained a sense of purpose from taking the course and their subsequent volunteering role through which they were able to 'give back':

I think it's given me a sense of purpose... we're giving something back and we're helping. When you see these children learning and feeling more confident about reading you feel good, you know, and it's like seeing you're not over the hill, you still can give something back, you know, it's definitely made me feel good about myself. (Recently retired, recent learner)

Others described how learning had increased their self-confidence because they had improved their skills in a certain area.

Maintaining/updating professional skills

For the semi-retired, learning had to have work-related outcomes. One had been able to maintain their professional networks through online learning whilst others had increased their professional capabilities through learning new topics and, as a result, improved the professional service they provided:

Learning and understanding what the new practices are and what the recommended practices are, I think, have helped and certainly keeping up with legislation and things. (Recently retired, current learner)

Socialisation

Learning new things and maintaining interests after retirement had helped some learners strengthen existing social relationships; they felt they had more to talk about with other people or were able to share interests with family and friends. Others had established new friendships which they noted had helped them avoid feeling socially isolated when they retired.

Well, there were lots of people there which we got chatting to and they were very informative, and it was a bit like a social club, but you've got your own area of expertise and you all help each other. (Recently retired, current learner)

Those involved in learning a language saw a range of social benefits. These included sharing an interest with family members and friends who had either come from other countries, or who had subsequently moved there, as well as enhancing their

enjoyment of overseas travel. One semi-retired learner worked with multilingual students in their new role and enjoyed the opportunities for dialogue that this new language gave them:

It works quite well, it does... they're funny and they bring me things to read and they bring me cultural movies to practice my Mandarin but yes, we have fun, and...I enjoy that. (Recently retired, current learner)

Enjoyment of learning

For some learners, the main outcome was simply enjoying the learning process. Others were happy because they had been able to pursue a hobby (e.g. silversmithing, sewing and knitting) and now had more practical skills or increased their knowledge in an area of interest (e.g. computing):

None other than that I'm enjoying doing it. I haven't done as much of it as I had thought I would but when I do, it is something that I get a great deal of satisfaction out of doing. (Recently retired, current learner)

Better equipped to manage a health condition

One learner, who had attended a course specifically to help manage their health condition, experienced direct and immediate outcomes. Their course was helping them to adjust to life with a disability following a serious illness:

It is useful, yes, things like goal planning and keeping yourself occupied and that kind of thing, arranging your life around things you need to do, that kind of thing. (Recently retired, recent learner)

4.2 Returning to work

4.2.1 Priorities and motivation to learn

For those returning to work, family life remained their main priority, presenting a range of practical (time, cost, childcare) and emotional (ability to maintain motivation, feeling confident enough, wanting to enjoy their children's early years) factors that needed to be considered as part of a wider decision about

whether or not to engage in learning. In order to participate, adults need to see learning as both valuable and practicable.

For many learners, this transition provided them with time and space not previously available to engage in learning. Having a career break, (considering) going back to work, and/or having a youngest child start school meant that learning had become more feasible than it had been for some time, perhaps since before their children were born.

At the same time, learning had become more of a priority for them. For some, this was seen as a way of improving their employment prospects, while others perceived that it would be an important way of demonstrating the value of education to their children. For others still, learning was seen as a means of taking time out of their employment or caring roles to do something enjoyable for themselves:

I know I said it's for my children but mostly this is for me, you know, this is mine, this is my choosing, this is what I'm doing and it's not easy but, you know, I'm benefitting from it. (Considering returning, current learner)

This transition was perceived as being a natural point at which to consider and evaluate work and career choices. For many, this life stage transition prompted a 'now or never' mindset – postponing the decision would only make it more difficult to achieve longer-term career goals:

I'm actually, you know, quite lucky to be in a position where I can debate about retraining and actually doing something that I would enjoy more or find it more as a career rather than a job, you know. I guess that's that, it's just we had thought about it for quite some time and like I say it literally just was a now or never kind of moment. (Considering returning, current learner)

Conversely, for focus group participants and some interview participants, this transition stage was considered to be one of the most challenging in which to participate in learning, because of the competing demands upon their time. A number of recent

learners who were considering taking up learning in the near future, felt it was currently more important to spend time with their family. This was particularly the case for those with very young families, demonstrating that children's age can be an important factor in the decision to take up learning.

For some, engaging in learning was seen as a vehicle for boosting their confidence – something they had lost while being out of the labour market. Some returners were seeking to regain confidence in existing skills and abilities, while others were looking for confidence to move into a new career:

There's also a slightly fear factor of, 'If I did get a new job or new role, what am I going to do? Am I actually going to be able to do it because I've not been actually using a computer for a long time? I've not been reading for a long time, I'm not really up to date with certain things'. So that was probably an element of scariness and thinking, 'Oh gosh, I need to do something because I need to make sure I can use a computer, and make sure I can do these things'. It was kind of a little test really. (Recently returned to work, recent learner)

One learner used the opportunity to learn during parental leave to maximise their chances of gaining a promotion when they returned and avoid 'falling behind' colleagues' progress:

If a band six role comes up then I could say, well, I've done this, I've furthered myself, I've done my own kind of research and gone off and done my own studying, that they might think yes, this person's quite motivated, you know, so yes, there is some of that trying to sort of further my career. (Considering returning, current learner)

For others looking to embark on a new career or move into a new area, learning provided an opportunity to gain the required qualifications to support them pursue their aspirations:

If I ever want to work on a ward in a hospital then it's a skill that you need because that's something that comes up all the time, so it would further my sort of career in a way, you

know, if I wanted to move round, people would say oh, well, you've got that qualification, you've done that training so yes you can come and work here for a bit. (Considering returning, recent learner)

An interest in changing career was often influenced by the need to secure work that fits alongside caring responsibilities. In recognition of this, returners identified that they were now more interested in undertaking learning that would lead to the development of new skills or gaining a qualification:

Thinking, 'I'm going to learn this and then it could really equip me to get a new job...' Even if I started low down, it means maybe by the time my youngest starts to go to school a bit, then I'll be available a little bit more. (Recently returned to work, recent learner)

For some, learning for familial benefits had become crucial, with learners motivated by an interest in better supporting their children with school work, and in providing a positive role model for their children:

I felt like it would benefit them [their children] as well, you know, in the fact that I would have, you know, like kind of more recent education and be able to say to them, 'Look, you know, this is fine, this is okay, it's not scary it's just you put the work in and you get what you want out'. (Considering returning, current learner)

For one returner who had retrained to become a nurse, being able to manage their child's health condition was their main motivation to take up learning:

I know that if he chokes I can save his life, I know that if he suddenly has a seizure, I can save his life, I know that he'll be proud of anything that I do in the sense of nursing, and he's really proud of that. (Recently returned to work, current learner)

4.2.2 Barriers and enablers to learning

Learners who were returning to work having taken time out to care for a child noted a range of factors – both enabling and constraining – that influenced their decision to participate in learning.

Childcare

Childcare emerged as an important consideration affecting returners' decisions about whether or not to engage in learning, as well as the location (travel distance) and timing of the offer. Many were simply unable to learn because they could not source affordable childcare at the required times:

Well, at the moment it's not possible for me to get childcare, we can't afford because it costs like £300 for one week to be in nursery and then my partner's parents look after their other grandson, so it's quite hard. (Considering returning, recent learner)

Even where a decision to learn had been made, childcare challenges continued to affect the experience of learning and future aspirations to learn. One returner who worked as a nurse struggled to complete a work-related course as she was unable to find childcare providers that would cover 12-hour shifts. Another, who was keen to take up a degree-level course which would require further travel, lamented that this would not be possible as they wouldn't be able to afford childcare for the extra hours.

Some learners relied on family members to provide childcare but were then only able to attend classes at times when family members were available – thus limiting their ability to find a suitable course. Others were clear that they had only been able to engage in learning because they did not have to arrange childcare. This included those who had been offered training during work hours, those on parental leave and parents with school-aged children:

I wanted to get them done so that they didn't impact on childcare when I go back to work, because they're on certain dates, so if my husband was working, I'd have to find childcare so that I could go on the course. (Considering returning, recent learner)

Time

Time was also a pressing issue, with many worrying about whether they would be able to fulfil their caring responsibilities and have the time and energy to successfully learn. Time pressures were most frequently cited by those who had already returned to work, but was also shared by one learner who was considering returning:

I don't want any of my studying to impact on the time that I could spend with them [their children], so it's looking at doing things in the evenings or late on, but I just feel like I'd be too tired at the minute. (Considering returning, recent learner)

Learners without access to training opportunities at work had to consider whether they could fit in learning alongside their work schedules. Here, the ability to plan in advance and be flexible was critical in ensuring that they could stay on course. For one learner, who was also caring for a disabled partner, last-minute information on timing meant giving up a degree place:

I spoke to a couple of different people through email, and I spoke to a few different people online. I even got through to the lead lecturer, but all I ever got was, they don't design the schedule, they get given it the same day we do, you know, that sort of thing. (Recently returned to work, current learner)

Locality

The availability of local learning opportunities also affected participants' choices, particularly if they could not find a suitable local course or provision that aligned with available childcare. One participant described how their ESOL studies had been disrupted when a local childcare provider closed. Another was finding it difficult to plan learning after their Access course

finished because it would not be possible to undertake a daily commute to their nearest university and meet the needs of their family:

I can't head on over to university in England and do my courses there because I have my family and they come first. So, the education will benefit us but as long as it doesn't encroach on that. (Considering returning, recent learner)

Cost

Cost is a key consideration for many adults in their decision-making around learning – this can be particularly so for returners who are not in work and not earning, and/or those facing additional costs, such as childcare.

Many learners reflected that they had been able to engage in learning opportunities because they had access to free or subsidised offers – perhaps through their employer or local council. One parent reflected that they were only able to engage in learning because a bursary was available:

For me, with doing it when I did worked, because I got the childcare paid for, and my son was obviously very little, but obviously if I didn't have the bursary, which they don't offer now, I wouldn't have been able to put him in childcare, so I would have had to wait until he started school. (Recently returned to work, current learner)

In contrast, where the costs of learning had been perceived unaffordable, individuals had been prevented from taking up learning opportunities or restricted their learning choices.

Social drivers

Family members, friends and peers can play a particularly influential role in whether or not adults decide to take up learning.

Supportive and encouraging family members and/or friends were a key facilitator in the decision to take up learning for many, perhaps through highlighting a talent, suggesting a suitable course, or demonstrating that it is possible by doing it first:

Well, my husband has always supported me, he'll support any decision for myself, you know like, especially education he's done the education through his work and we're both big believers... I have friends that have done it and they're around the same age as me. (Considering returning, current learner)

Conversely, those with family members who had never participated in learning or work identified that this had influenced their decision to take a long break from work to care for children and to not take up learning. However, one focus group participant was keen to break away from this norm and pursue learning in the future:

I can't believe it that I've been for that long and there are people out there, but I think it's particularly family because none of the ladies in my family do work, they just... and I don't want to be that person, I want to have something for myself. (Considering returning, Focus group participant)

Several participants described how the recommendations of professionals, including GPs, managers and JobCentre Plus advisers, helped them to either find a suitable course or encourage them to learn. The influence of those outside an individual's social/family circle can therefore be another powerful driver of learning:

I was attending my local Job Centre, and they sort of said, 'Yes, what's the plan? What would you like to do?' and I said, 'Well, it would be nice to speak to a careers advisor, I'm not sure what I want to do, where I want to go,' so they put me in touch with the careers advisor, and we had a discussion about what I'd done in the past, what sort of training I had, what I was passionate about, and she sort of said, you know, '[This] Uni has got an open day, why don't you go and have a look?' I went and had a look, I applied while I was there. (Recently returned to work, current learner)

Some returners spoke about how meeting new people and being able to speak to other adults was a key factor in their decision to learn and enhanced their experience of learning. Sharing their

learning experience with other adults with similar aims and goals for learning, and certain characteristics (including age and gender) made for a particularly positive experience:

I must admit like it was a really enjoyable experience. I've met a few ladies there and everyone seems in a very similar age group, a majority of women that obviously wanted to do something for themselves. (Recently returned to work, recent learner)

Conversely, where learners had few shared characteristics – most notably due to their age – the experience had been less positive. For those not engaged in learning, being older than other learners on the course was a main concern:

I think I'd just feel a bit silly if I walked in and there was like, 16, 17-year olds in there. (Considering returning, Focus group participant)

I think it puts people off because they have to go into a college when there are loads of kids and 16 year olds, and I think it just puts people out of their comfort zone. I think that's why I'm more worried of going back to college now I'm nearly 21...I think because there's like younger people, if you understand what I mean. It's pretty intimidating with younger kids nowadays. (Considering returning, recent learner)

Confidence

Confidence was a key barrier for returners – particularly for those who had not recently engaged in learning and had been out of work for an extended length of time. Focus group participants reported that a lack of confidence was a main barrier to their engagement in learning – feeling overwhelmed and daunted by the idea of returning to education:

I think it's all just so daunting going back into education.
(Considering returning, Focus group participant)

Those who had taken up learning in order to move into a new career identified with this feeling, noting that prior to taking up learning they had been worried about their capabilities. Many

overcame this by completing introductory learning which gave them confidence. This encouraged them to engage in more learning in the future.

4.2.3 Outcomes and benefits of learning

Again, reflecting their breadths of goals and aspirations, returners experienced a range of outcomes and benefits to their learning.

Enhanced skills, knowledge and confidence

The two most commonly cited outcomes for returners related to skills and knowledge development and increased confidence. The two were often linked; by improving their skills and/or knowledge, learners felt more confident about their abilities, their work and future aspirations.

It was a huge confidence boost and also when I'm doing stuff and I knew it and it's like, 'Oh, it's flooding back', and also to know that I can revise for exams. That was quite a shock but I thought, 'Wow'. (Recently returned to work, recent learner)

I think I'm a little more confident. Just before we broke for mid-term we all had to stand up and give a presentation, it's just to our class but the idea if you were to tell me that even 10 years ago, you know, to stand up and talk in a room full of peers I'd be like, 'On your bike', you know, but it was a wee bit nerve wracking, yes, but I just thought, 'yes I can do this, yes I can do it, yes'. (Considering returning, current learner)

One interviewee discussed how by completing learning while on maternity leave, they had been able to overcome some of their anxieties about returning to work:

I felt out of touch with work and stuff so I think it was a way of getting a bit reconnected and getting myself back into it and building my confidence again, even just going to the actual buildings and going and doing something, because it's been such a... it feels like it's been such a long time and you kind of feel like you've forgotten things or things are

changing so much, so you need to keep your skills up to date really and your knowledge. (Considering returning, recent learner)

For others, learning had enabled them to meet their desired career outcomes, which was often complemented by a sense of pride and greater confidence. Improving their English language skills had improved one learner's ability to communicate, which in turn had positive effects in their personal and professional life:

My English was so improved...so everybody was saying your English has improved, I was so proud of myself...It makes me feel good...I can explain myself and I can understand what you try exactly to tell me or ask me and I can understand but before I can't really explain myself, I need to wait for someone to be with me and explaining to me but today I can be able to explain myself. (Recently returned to work, recent learner)

5. ENGAGING MORE ADULTS IN LEARNING

A key purpose of this research is to better understand how changes to policy and/or practice could support more adults at key life transitions – including retirement and return to work after caring for children – to engage in learning.

In order to do this, two focus groups were organised with adults who did not consider themselves to be learners. The first involved those soon to be, or recently, retired. The second comprised those who were considering returning, or who had recently returned, to work after having time out to care for children.

As part of each focus group, information about learning opportunities was presented in six different ways, with participants invited to discuss which approaches they found most effective. A mock prospectus was developed to stimulate discussion.

5.1 Use of images

Participants in both focus groups identified a range of factors that they considered to be important when considering the use of images designed to promote learning opportunities.

Image one



Image two



Being represented in the image

All participants emphasised the importance of seeing 'someone like them' in the image, with the both groups identifying the ages of learners within the image as being the most influential characteristic:

I think it's important for me [that there are] older people in the photo. I would be put off if it was just young people.

(Retirement focus group participant)

Formal vs informal

The layout of the learning environment was also important to both groups. The 'retirement' group tended to be attracted to informal settings, such as group work in a library. The 'returner group' were more attracted to a formal representation of learning, such as a teacher-led session in a traditional classroom setting (Image 1). Returners also valued images where technology was present. Both groups found images of 'engaged' and 'active' learners and 'interactive' experiences of learning attractive.

Tutor presence

Both groups were concerned by the lack of tutor presence in image two, indicating the importance of having a clear representation of the leader of the session:

The top one. Who is meant to be the teacher? It's just a group of people learning. I can't quite come to grips with it.
(Retirement focus group participant)

They could be all strangers just sitting there and they've got no direction. Who is going to lead them? (Retirement focus group participant)

Members of the 'retirement' focus group had mixed views about whether images had a role to play in encouraging adults like them to engage in learning. Some suggested that, as you age, you are less interested in style and more influenced by substance – with information playing a greater role than image.

The images are nice, but they are like wrapping paper for a Christmas present. The children like the wrapping paper but, as you grow older, you like the substance so you go into the agenda, what they say about the course. (Retired focus group participant)

5.2 Communicating the benefits of learning

Participants in both focus groups agreed that communicating the benefits of learning was an effective method of encouraging more

adults to engage, with the most effective messages being those that are perceived to be most relevant to their life stage and circumstances.

Messages focused on the potential to make new friends and feel supported were particularly attractive to the 'retirement' group, as were those focused on the role that learning can play in keeping them active and in supporting them to explore new interests.

Extract from stimuli

91% of adults who took part in U3A activity reported that they made new friends and felt supported⁷⁶

Among the 'retirement' group, it was considered that benefits of learning are best framed in terms of meeting the individual needs of the learner, rather than any wider benefits to their families or economy. In contrast, 'returners' were more attracted to messages focused on the familial benefits of learning.

Extract from stimuli

Family learning has a large and positive impact on children's learning, giving children greater confidence and self-belief, with measurable benefits to their literacy, language and numeracy skills.

⁷⁶ Extract taken from U3A, 2018: <https://www.u3a.org.uk/images/misc/impactreport/impact-report-2018-06-1.2-final-web.pdf>

I like [this one] just because I never thought of it in that way because you always teach your children by the way, we always say, the way you act and behave your children will be like that or learn from you and so I think, obviously, if you go to college or you promote yourself, I'm doing this for myself, that your children will grow and see that this is a good attitude to have or something like that. (Returner focus group participant)

Participants had mixed views on the extent to which they found statistics engaging. While some 'returners' were attracted by information on potential earnings, others were sceptical about whether the figures presented were actually true.

For participants in the 'retirement' group, it was important that information was presented in bitesize chunks, so as not to be overwhelming.

5.3 Learner testimonies

Participants in both focus groups considered that testimonials, drawing on real-life experiences of learners were likely to stimulate action and influence adults' decision to take up learning.

For both groups the message within learner testimonies that 'it's never too late to learn' held most resonance. It gained particular traction among the 'retirement' group, who saw it as providing effective challenge to the normative perception of this stage of life.

Extract from stimuli

'People are working longer than ever before. Your local college offers courses for adults of all ages. It's never too late to learn and progress your career. You could do it too!'

It's breaking that false construct down as well. You come through retirement, you're supposed to do what retired people do, sitting on a beach or something. (Retired focus group participant)

However, participants felt that learner testimonies should be nuanced, rather than simply communicating the positive experiences of learning. 'Returners' suggested that learner stories should include some of the challenges that learners might face, such as lack of confidence, or how a working mother would need to juggle childcare and learning, and their experience of sourcing childcare provision. Honesty was considered to be critical in ensuring that learner stories were credible and compelling.

While our stimulus material was presented in a written format, participants suggested that it would be even more powerful to have stories presented as videos of people talking about their experiences.

5.4 Cost of learning

Participant reactions to receiving information about the costs of learning was varied, although there was consensus that any information should be presented clearly with the learner in mind – and not include confusing jargon, for example about levels of learning.

I think it needs to explain what level training. I haven't got any idea what they're talking about. (Retired focus group participant)

Like, Level 3 training, Level 4 education does that mean uni? I don't know. (Returner focus group participant)

Participants in the 'retirement' group considered it essential that they have information about the cost of learning before making a decision about whether to engage, and that this should include any hidden costs such as transport, meals and course equipment. While this group said that cost was not the primary factor behind their decision to learn, they identified it as an important secondary factor in assessing the affordability of learning.

As identified previously, adults approaching and going through retirement are more likely to engage in learning for enjoyment, rather than for work-related reasons. Some group participants were therefore less likely to want to invest financially in learning at this stage of life, as they did not associate this with providing a return on investment. Their preference was for free or low-cost learning options.

I'd rather just for my own enjoyment try and find something that's free for older people. If I was looking for a certificate, then it would be a different matter, but I'm retired and not really looking for work. (Retired focus group participant)

Returners were much more likely to see learning as a financial investment and were therefore looking to receive specific and reliable information about both the costs of learning and potential returns.

5.5 Supporting learners

The stimulus included details about a range of support services available to learners. Those in the retirement group generally felt that the support options were more appropriate for those studying full time and not necessarily pertinent to their age group.

In contrast, 'returners' were particularly engaged by messages about childcare and financial support but felt that greater clarity about financial support was needed, such as whether eligibility for support was based on household income:

Is it just based on your salary, working salary, or is it combined household? (Returner focus group participant)

Sometimes, especially if you're married, they always look at your whole situation rather than just you and you're the one doing the course and it's, like, expected your husband's at home and he earns a salary but who's to say he gives you anything? (Returner focus group participant)

Participants in both groups concluded that any support offer should explicitly focus on addressing the particular needs of those adults that providers were seeking to engage.

5.6 Different learning modes

Participants in both focus groups were provided with information about different modes of learning that could be available to them. This included online, blended, face-to-face, work placements and peer-to-peer learning options.

The flexibility offered by blended learning was considered attractive to both those in the 'retirement' group and 'returners', with the former deeming that some face-to-face element is essential in creating a shared learning experience:

It's about learning and sharing as well at this age, sharing experience. (Retired focus group participant)

Participants in the 'retirement' group were attracted to flexible learning options that take place over a few hours per week, that focus on enjoyment and interests rather than achievement, and that are delivered locally.

Returners were particularly attracted to the idea of work placements. The opportunity to learn whilst working was felt to be beneficial to both learners and employers, and some participants felt that this practical approach would play to their strengths because they hadn't been engaged in formal learning for a long time and might struggle with the written side of the learning process:

Work placements but that's because I'm better at working and learning on a job than I am writing and reading. (Returner focus group participant)

It means you can work alongside kind of basic qualifications and got kind of... again, it's all about balance, work-life balance. (Returner focus group participant)

5.7 Engaging more adults like me

As well as responding to stimulus material, focus group participants were asked for their ideas about how to effectively engage more adults in learning. Learners involved in interviews were also invited to share suggestions. Responses are outlined in Table 1.

Those going into and through retirement called for more provision that would help them plan for and enjoy retirement, as well as practical courses such as on healthy living. Returners were more likely to focus on career-related provision, including basic skills courses accessible to parents and learning

opportunities that sought to build confidence.

While the focus of learning was different between the two groups, both emphasised the value of flexible provision, including online options, as well as an interest in having access to taster courses to support their return to learning.

Both groups placed a strong emphasis on receiving information, advice and guidance through a range of trusted sources that they were already in contact with. For those in retirement, the information sought often focused on the content, format and location of learning. Returners were also interested in receiving information and support that would facilitate progression to further learning.

Table 1: Engaging others in learning

	Adults at retirement transition	Adults returning to work
Course type	<p>Relevant to life stage and age, and retirement courses</p> <p>More provision on topics such as:</p> <ul style="list-style-type: none"> • accessing further education opportunities • planning retirement and semi-retirement • practical knowledge such as healthy living and first aid 	<p>Career-related courses</p> <p>Making basic skills courses more accessible and attractive</p> <p>Confidence building courses.</p>
Course format	<p>Flexible, short-term provision as many individuals felt unable or unwilling to commit due to other interests and activities, such as travelling.</p> <p>Online learning beneficial as it offers flexibility.</p> <p>Taster courses.</p> <p>Face to face learning as it offers opportunities for social interaction.</p> <p>Provision adapted to health needs. For example, recognition of their ability to work with screens, or physically access classroom-based learning.</p>	<p>Flexible provision to enable adults with children to juggle caring responsibilities, employment and learning.</p> <p>Online learning beneficial as it offers flexibility, especially for those working shifts.</p> <p>Taster courses beneficial as less overwhelming and can access a variety of topics, especially for those who have been away from the labour market for an extended time and are unsure the direction they want to take.</p>

Learning costs	Subsidised learning opportunities for individuals at this life stage, especially those on low pension.	Subsidised learning opportunities for parents on low income. Support from employers with work-based training.
Information, advice, guidance and support	<p>More information about how to spend retirement enjoyably.</p> <p>More information about relevant options such as informal learning opportunities and retirement courses.</p> <p>Information available from a range of sources, with trusted sources (e.g. friends and family) being particularly valued, along with information online and in local community venues such as libraries.</p> <p>One-to-one needs assessment.</p> <p>Signposting to suitable, local provision.</p>	<p>Thorough and accurate information about learning opportunities that realistically reflects the demands of the course.</p> <p>Post-course or pathway information for those looking to access further or higher education but with little experience of academic routes.</p> <p>Information available from a range of sources through individuals and services that returners tend to come into contact with such as their children's schools and social media.</p> <p>Support from employers to access learning through or at work.</p>

6. CONCLUSION

The responses and perspectives captured through this research provide powerful evidence of the complex relationship between engagement in learning and key life transitions associated with retirement or returning to work after caring for children.

Both are heavily influenced by adults' changing position in the labour market, but wider factors are important too – changing goals and priorities, different demands on time and the availability of finances all have a role to play, as do family and societal expectations and responsibilities.

This study both corroborates and builds on existing evidence. It provides insight into the challenges that adults face, and how policy and practice can be developed to better engage them in learning at key transition points. Acting on these findings will be critical if we are to address the under-representation in learning faced by adults in these circumstances.

6.1 Motivations to learn

Previous research⁷⁷ shows that adults have a range of motivations for engaging in learning, influenced by personal, social and economic circumstances, as well as past experiences. This study demonstrates that key life transitions, and the set of

77 Pennacchia, J., Jones, E. and Aldridge, F. 2018. *Barriers to Learning for Disadvantaged Groups: Report of Qualitative findings*. Learning and Work Institute. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735453/Barriers_to_learning_-_Qualitative_report.pdf

circumstances, practical and attitudinal factors that come with them, shape adults' priorities and future plans. This in turn can influence adults' motivations to learn.

For some people, engagement in learning becomes more of a priority at these transition points, especially where there is potential for learning to play a pivotal role in achieving ambitions and aspirations. For example, learning for career-related reasons may still be important for those approaching retirement, whereas once in retirement, learning for leisure and for social and cognitive stimulation, becomes more prevalent. Similarly, improving career options is often a key motivation for returners, as is a commitment to support their children's education.

6.2 Barriers and enablers

A range of barriers exist that affect an adults' decision to take up learning. As with motivations, the influence of these barriers on individual decision-making changes throughout transition periods.

Attitudinal barriers, such as feeling too old, not wanting to learn, or the perception that skills and capabilities may have deteriorated can become more prevalent for adults moving into retirement. Cost too can become a greater barrier, leading to suggestions that retired adults should have access to heavily subsidised or free provision. For returners, the most significant challenge often relates to work and time pressures, primarily associated with childcare arrangements. For those who have spent a long time out of education, a lack of confidence in being able to learn successfully is also an issue; for some, the thought of returning to learning is 'overwhelming'.

Similarly, a range of enabling factors also influence adults' decisions about the feasibility and value of learning during

these transitions. For example, retirement can provide the time and space to pursue long-held interests or take up something new for enjoyment, rather than having to focus on learning for work-related reasons which dominated previous life stages. Taking parental leave or returning to work can also act as a trigger to engage in learning. This often happens when adults have more available time to learn – perhaps when their youngest child starts school or during parental leave. It can also provide parents with emotional space to focus on future aspirations. Considering or planning returning to work can prompt a re-evaluation of work and career aspirations and taking up learning be a way of meeting these goals.

Life transitions therefore, present a changing set of circumstances that shape adults' decision-making to take up learning. The barriers and enablers encountered during these transitions interact to either hinder or facilitate engagement in learning – and should be considered when designing outreach activities and learning provision.

6.3 Engaging adults in learning

Adults are most likely to engage in learning that they consider to be relevant to their life stage and circumstances. For example, having other people at their age and stage of life represented in messaging and marketing was seen as having a key role to play in encouraging adults to consider learning. Messaging focused on relevant outcomes of learning was also highlighted as being important. For those planning retirement, this meant communicating the role that learning can play in social and intellectual stimulation. For returners, this was more about conveying how learning could improve their career opportunities. Returners, reflecting on how this life transition involves juggling multiple priorities, also emphasised the need

for honest and accurate messaging about the experience of learning.

The availability and active promotion of relevant provision was also considered to be important. This might include retirement courses for those making the transition into retirement, and career-focussed provision for returners.

Short-term, local, and affordable provision was suggested as being particularly valuable for those who are retired. For returners, flexible provision, such as blended learning, that fits around other responsibilities, is more of a priority; as is practical support such as suitable, quality and flexible childcare provision, financial support and (where relevant) support from employers.

Finally, for those furthest away from the labour market, provision designed to build confidence is seen as being critical to both increasing and widening access to learning, with taster courses highlighted as an ideal way to encourage more adults to take first steps back into learning.

7. RECOMMENDATIONS FOR POLICY AND PRACTICE

Key life transitions, such as retirement or returning to work after caring for children, can be a catalyst for engaging adults in learning. This study offers a number of recommendations for policy and practice, to help make the most of these opportunities.

7.1 Recommendations for policy

- **National lifelong learning strategy.** The pace and scale of economic, social and demographic change is unprecedented within our lifetime. It is vital that every effort is made to harness the opportunities presented by the 4th Industrial Revolution, while ensuring that no one – including those seeking to leave or return to the labour market – is left behind. Government should lead the development of a national lifelong learning strategy, aligned to wider policy objectives.
- **Increase investment in lifelong learning.** Declining participation and persistent inequalities in lifelong learning limit individual opportunity, hampers social justice and holds back economic growth. Government should reverse the decade-long fall in real-terms investment in lifelong learning to drive economic growth, promote social justice and support inclusive communities.

- **An entitlement to lifelong learning.** Despite a wealth of evidence on the benefits of learning, fewer adults are learning than ever before and persistent patterns of participation are reinforcing inequalities. Urgent action is needed to address this. Government should consider whether, coupled with a step change in investment, the introduction of an entitlement to lifelong learning would have a role to play in addressing this challenge.

An entitlement to lifelong learning could form the cornerstone of a national lifelong learning strategy: facilitating flexible, high-quality learning opportunities in a broad range of settings; encouraging greater and wider access to learning, facilitating pathways for adult learners to progress; and promoting the wider individual and social benefits of learning, including in relation to health and well-being.

- **Personal learning accounts.** There is a growing interest in, and momentum, around the idea of personal learning accounts. Several different models have been proposed and further work is needed to develop and trial an effective approach. Government should develop and trial a personal learning account model, as a mechanism to both stimulate greater engagement in learning and provide a vehicle through which investment in learning by the state, employers and individuals can be aligned and optimised.

Drawing on the findings of this study, there is a case for aligning personal learning accounts with key life transitions by undertaking focused promotion of accounts and/or providing 'top ups' at key life stages, such as returning to work or preparing for retirement.

- **An entitlement to career reviews as part of age- and stage-appropriate information, advice and guidance.** A key challenge for adults at retirement stage and those who have been out of the labour market while caring for children to accessing learning, retraining, financial or career-planning opportunities is the lack of suitable information, advice and guidance. As part of its wider careers strategy, government should introduce an entitlement to career reviews for adults at key points of transition. It should also consider the breadth of these reviews, recognising the interplay between education, work, family and health.
- **National Retraining Scheme.** As part of the wider development of the National Retraining Scheme, the government should give particular attention to how returners can be supported to upskill and retrain to re-enter the labour market. Consideration should also be given to how the Scheme will support older adults managing extended working lives, including transition into semi-retirement and unpaid work. This has the potential to provide a framework to explore supporting the skills needs of adults at other key life transitions.
- **Access to apprenticeships.** Apprenticeships can be an important means of supporting adults at key transition points to develop their skills while working. As part of its wider commitment to review how apprenticeships deliver value for money while improving individuals' skills and supporting increased productivity, government should pay particular attention to ensuring that the programme is accessible to returners. Flexible timetabling and blended learning options to facilitate part-time and flexible apprenticeship models should be developed and

promoted. Ensuring that apprenticeships are consistently of high quality and offer real progression opportunities and wage returns is particularly important for returners.

7.2 Recommendations for practice

- **Tailor outreach and engagement activities to the interests, motivations and priorities of adults at life transitions.** Adults are more likely to respond to material that includes images and learner testimonials of 'people like me' and addresses the concerns they may have about learning. For example, all the participants in this study, thought that a focus on 'It's never too late to learn' would be effective in engaging new adult learners. Promotional materials should also focus on relevant outcomes to the intended target group.
- **Identify and use relevant intermediaries to engage adults in thinking about learning.** Adults are more likely to engage in learning if they are encouraged and supported by individuals and organisations that they trust, including family members and friends. Employers can play a valuable role, particularly in supporting adults as they move in or out of the labour market. Schools and childcare providers could also play a greater role in informing and engaging adults in their own learning.
- **Provide clear, thorough and accurate information about the provision on offer.** The affordability of learning plays an important role for many adults when deciding whether to engage in learning; in particular, information on cost needs to be transparent and reliable. For returners, having honest and accurate information about what the learning experience entails and what support options (e.g. childcare) are available is crucial

to support their decision-making process and manage expectations.

- **Provide opportunities for adults at key life transitions to take a first step into learning and build confidence.** Retired adults and those who have been out of the labour market while caring for children tend to be under-represented in learning. Those who are learning are often doing this independently, and would therefore benefit from provision, such as taster courses, that builds confidence and provides an accessible pathway into further opportunities. Older adults were often worried about their ability to 'keep up' with other learners, while time out from work had impacted on the confidence levels of some returners.
- **Provide a curriculum that aligns with the goals, aspirations and interests of adults across a range of life stages and transitions.** Adults in both groups expressed concern that much of the learning currently on offer was targeted at young people studying full time or entering the labour market for the first time. As such, they often felt that the provision offer did not align well with their aspirations and interests. Returners expressed particular interest in being able to access more career-related courses, as well as provision to develop their basic skills and to build confidence. Adults approaching retirement would like to see a stronger curriculum to help them plan this stage of life, as well as a wider range of leisure and personal interest courses.
- **Offer flexible provision that can fit alongside learners' competing priorities.** Returners in particular have to manage several competing priorities, including work, family and caring responsibilities. During this transition,

family is their main priority, and provision should therefore be designed to flex around this. Blended courses and online provision have a role to play, as do more opportunities to learn in the workplace and greater employer support for learning.

- **Provide quality, affordable childcare provision.** Returners face a range of barriers to learning, though sourcing childcare is the most challenging. Ensuring that suitable, quality and flexible childcare provision is available would support more adults at this key transition to engage in learning.

We recognise that providers are limited in the extent to which they can offer childcare support within existing resources and facilities. Organisations such as Save The Children (through their Make Childcare Work campaign) and Coram Family and Childcare are campaigning for better and fairer childcare provision. This is primarily to help parents return to work, but would also serve to improve early years support for child development. We encourage government and providers to work more closely with childcare advocates to develop a system which supports both work and learning opportunities.

- **Create appropriate support and progression pathways that recognise learners changing priorities and circumstances.** Change is a dominant feature of any transition, including that associated with retirement or returning to work after caring for children. For adults to continue with their learning and to progress onto further opportunities as their priorities and circumstances change, tailored support and flexible pathways will be needed.

- **Regularly review your provision and learner profile to better understand the extent to which you are attracting and meeting the needs of adults at key life stages.** In doing so, there is a need to avoid over-burdening learners with intrusive data collection, while collecting appropriate data to ensure that the provision and support on offer is relevant and appropriate, and that possible barriers to learners are minimised.

ANNEX 1: METHODOLOGY

Funded by the Further Education Trust for Leadership (FETL), Learning and Work Institute (L&W) was commissioned by the WEA: Adult Learning Within Reach and a cross-sector steering group to undertake research to explore the motivations for, barriers to and experiences of learning for adults at key life transitions.

While a wealth of evidence exists on educational disadvantage in general, much less is known about adults' experiences at particular transition stages in life. To make a distinctive contribution to the evidence base, this research aimed to answer the following main question:

- How is educational disadvantage experienced by adults at particular transition points, ages and life-stages?

To provide an in-depth exploration of the topic, the research also aimed to answer the following sub-questions:

- What role do these transition points play in adults' decisions about learning?
- What role is learning expected to play at these transition points and what are the expected outcomes of learning?
- What barriers do adults face at these transition points?
- How do these barriers vary according to other factors including age, life-stage, gender, ethnicity and socio-economic background?

- What could practitioners and policy-makers do to support adult learners at these transition points?

Given our broad understanding of the educational disadvantages that older adults face, and the disadvantage that women returners experience in the labour market, two key transitions were selected for in-depth exploration. These are:

- approaching retirement or being recently retired; and
- returning to work after caring for children.

The mixed methods study was conducted in the four stages:

Rapid evidence reviews. To ensure that this study was underpinned and informed by existing evidence, two evidence reviews were conducted. In addition to our own desk review, the project steering group members were invited to suggest relevant papers.

The first review considered existing evidence relating to the factors (motivations and barriers) and benefits associated with learning around the transition into retirement, including those approaching or considering retirement and those who had recently retired. The second explored the existing evidence base on experiences of learning and the influencing factors for adults who are considering returning to work, or have recently returned to work, having taken time out to care for children.

Collection and analysis of quantitative data from L&W's 2018 Adult Participation in Learning Survey. For over 20 years, L&W has undertaken an annual survey of adult participation in learning. The survey series, which began in 1996, provides a unique overview of the level of participation in learning by adults, with a detailed breakdown of who participates and who does not. Each year, 5,000 adults aged 17 and over across the UK are provided with the following definition of learning and asked when

they last took part in any learning, as well as how likely they are to take part in learning during the next three years:

Learning can mean practising, studying or reading about something. It can also mean being taught, instructed or coached. This is so you can develop skills, knowledge, abilities or understanding of something. Learning can also be called education or training. You can do it regularly (each day or month) or you can do it for a short period of time. It can be full time, or part time, done at home, at work, or in another place like a college. Learning does not have to lead to a qualification. We are interested in any learning you have done, whether or not it was finished.

The survey deliberately adopts a broad definition of learning, including a wide range of formal, non-formal and informal learning, far beyond the limits of publicly offered educational opportunities for adults. The survey also contains a range of wider questions to examine issues such as motivations for learning, barriers encountered, and benefits experienced.

A question was added to L&W's 2018 Survey of Adult Participation in Learning to identify respondents at each of these transition stages. More information about the survey methodology can be found here: <https://www.learningandwork.org.uk/our-work/promoting-learning-and-skills/participation-survey/>. This stage was designed to gather new data of relevance to transition points, age and life-stage, enabling us to compare decisions and behaviour of respondents to the general population. The question was:

Which, if any, of the following statements apply to you?

- ▶ I am expecting to retire in the next three years
- ▶ I am expecting to retire from full time work in the next three years but may consider part time work

- ▶ I am not working at present as I care for one or more children
- ▶ I am in part--time employment at the moment as I care for one or more children
- ▶ I have recently returned to work after a period out of work caring for one or more children
- ▶ I am currently considering returning to work after a period out of work caring for one or more children
- ▶ I am due to go on parental leave in the next 12 months
- ▶ I am considering having children and taking parental leave from work in the next 3 years
- ▶ I am not working at present as I care for a relative or friend
- ▶ I am in part--time employment at the moment as I care for a relative or friend
- ▶ I have recently returned to work after a period out of work caring for a relative or friend
- ▶ I am currently considering returning to work after a period out of work caring for a relative or friend
- ▶ None of these
- ▶ Don't know

For analysis purposes, responses to these questions were used to create four groups:

- Those expecting to retire (243 respondents)
- Those who were recently retired (516 respondents)
- Those not working, with caring responsibilities (including not working and caring and considering returning to work and caring) (295)

- Those working, with caring responsibilities (including those who had recently returned to work and those in part-time work) (231)
- Survey average (total of 5,060 respondents)

Based on the interim findings of the first two stages of the study, the steering group provided feedback and input which helped to inform the final qualitative stage of the project.

Depth interviews. Depth interviews with current and recent learners aimed to complement the quantitative findings of the survey and provide deeper insights on adults' experiences of learning at the two transition stages, including their decisions about, motivations for and barriers to participating in learning, and how these factors and life stages interact and influence each other to shape their experience of participating in learning.

In March 2019, qualitative interviews were undertaken with 20 individuals who were current or recent learners. Ten were approaching retirement or recently retired and ten were considering returning to work, or had recently returned to work, having taken time out to care for children.

A range of participants were recruited based on age, gender, social grade, learning status (current or recent) and transition status (e.g. approaching retirement, or recently retired). This was done to provide insight on the role that demographics such as age, or gender, might play in experiences of learning, and how these interrelate with key transition stages.

During interviews, participants were asked about: experiences of learning, motivations for learning, any challenges experienced, any plans for future learning, and recommendations on how more adults can be supported to engage in learning.

Focus groups. Two focus groups were conducted which built on insights gained from interviews with learners. The focus groups aimed to better understand the reasons behind not engaging in learning as an adult at each transition point and what changes to policy and practice would enable those who are not current or recent learners to take up learning.

The focus groups took place in March 2019 alongside the qualitative interviews. The first was made up of seven adults at retirement stage, the second five adults at the stage of returning to work having taken time out to care for children.

Themes covered in the focus groups included: their perspectives on adult learning, barriers to learning, approaches to potential engagement in a learning opportunity and approaches to engaging more adults at transition stages into learning by concept-testing a mock prospectus.

Although participants were sampled based on them considering themselves to be not current or recent learners, it transpired during the focus group that some participants in the retired group were currently engaged in some learning. We have therefore analysed and reported the findings together, making it clear, where relevant, whether someone considered themselves to be a learner or not.

In order to gain an in-depth understanding of the factors that influence adults' motivations, barriers to and experiences of learning at transition stages, we used elements of the COM-B behavioural model. The model highlights a range of automatic, non-conscious drivers of behaviour (emotions, heuristics and habit), rational drivers (judgement, capability and confidence), social drivers (culture, identity and norms), and the effect of external environmental factors (defaults, priorities and opportunities) which drive behaviour. We used these categories

of behavioural drivers to understand and interpret the qualitative research findings, during the analysis stage. This approach therefore helps derive insights into the real reasons behind people's behaviour, which enables us to reach better conclusions about how to influence behaviour.

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