Active ageing and universities: engaging older learners

Universities UK

Research reports

This series of Research reports published by Universities UK will present the results of research we have commissioned or undertaken in support of our policy development function. The series aims to disseminate project results in an accessible form and there will normally be a discussion of policy options arising from the work.

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In 2008 Universities UK published two reports arising from a major project analysing how the size and shape of the higher education sector might change over the next 20 years in response to demographic changes. The project considered the demographic data on the age groups most relevant to the future demand for higher education and developed a set of demand-based projections for the four countries of the UK. It examined the impact of these developments on the different student markets that universities currently operate in. The size and shape project generated considerable interest in the sector and as a result Universities UK decided to publish a number of specific studies of the different student markets, combining an analysis of data about enrolment trends with a discussion of current issues and the opportunities for future growth. The purpose of these studies is to alert member institutions and policy makers to the main issues affecting the future development of these markets. This report on older learners follows the publication of studies on taught and research postgraduates. Further studies on part-time students and the future market impact of private providers will follow later in 2010.

This report reviews the engagement of older learners (defined as those aged 50 and over) in education and training with particular reference to their involvement in higher education. The ageing of populations was one of the most important trends in the 20th century and will raise major challenges in this century. In 2007, for the first time ever in the UK, the percentage of the population under the age of 16 dropped below those of state pension age. The number of people aged 50 to 64 will rise to 21,7 million by 2032, an increase of a million on the 2007 figure. These trends suggest that social institutions will need to find fresh ways of adapting to and supporting an ageing population. The report examines the contribution that higher education might make to this process and suggests how universities might respond to changing patterns of demand (which will be influenced by varying patterns of work and employment as well as changes in the older age cohort). It also consider how policy changes could remove some of the barriers to the participation of older people in higher education.

Summary

Findings

1 This report reviews the engagement of older learners (defined as those aged 50 and over) in education and training, with particular attention to their involvement in higher education.

2 The ageing of populations was one of the most important developments of the 20th century and will raise major challenges for life in the 21st. The proportion of the UK population aged 65 and over has increased steadily over the past 35 years: from 13 per cent of the population in 1971 to 16 per cent in 2008; it is projected to reach around 20 per cent by 2026. In 2021 there will be nearly 1 million more adults between the ages of 55–64 than in 2011, with many among this group keen to participate in higher education.

3 Ageing will be transformed in the 21st century, with:

■ increases in life expectancy – currently standing in the UK at 17.4 years at age 65 for men and 20 years at age 65 for women

■ changes in social attitudes – with traditional stereotypes of old age challenged by the post-war 'baby boom' generation

■ new social roles – with greater engagement in community and leisure activities

■ extended activities associated with employment – illustrated by the rise in self-employment, part-time working and consultancy work.

4 Higher education can be a key partner shaping responses to demographic change. It can achieve this in four main ways:

■ playing a leading role in creating a new type of ageing for the 21st century, built around extended economic, family and citizenship roles

■ supporting women and men planning the two decades or more likely to be spent beyond their main work careers

■ unlocking mental capital and promoting wellbeing in later life

■ supporting a range of professional and voluntary groups working on behalf of older people.

5 Presently, only a small proportion of the 50-plus age group is involved in formal educational study. Much of the growth in the numbers of mature students on part-time undergraduate and postgraduate courses has been taken up by students in their 30s and 40s, with 50 remaining a point at which educational activity goes into sharp decline.

6 In the UK, a number of universities has developed centres or institutes of lifelong learning. Most of these build upon a longstanding university adult and continuing education tradition, promoting a wide range of courses to the general public. Despite this, such courses have yet to reflect the changing needs and aspirations of a new cohort entering what has been termed the 'third age' following full-time employment.

7 Formal education remains a relatively junior partner beside informal learning, with the University of the Third Age (U3A) probably the best illustration with an estimated 670 active groups and around 190,000 older learners.

8 Informal learning has flourished in part because the formal sector has either remained marginal or has substantially withdrawn from engagement with older learners: the number of people aged 60 and over participating in further education declined by 38 per cent between 2005/06 and 2006/07. There has been a long-term decline in those participating in adult and community learning. In higher education, the problems facing older learners may be increased by the withdrawal of institutional funding for students studying for a qualification at a level equivalent to or lower than the qualification they already hold (ELQs).

9 In terms of activities with older learners, universities might pursue four possible pathways:

■ Educational and personal development programmes: these would build upon existing work in adult and continuing education, but would identify new types of courses and markets among a diverse and segmented post-50 market.

■ Employment-related programmes: these might support the policy objective of extending working life, although the extent of employer-demand may be fragile in the context of high levels of unemployment. The development of courses supporting people moving from full-time paid employment to various forms of self-employment may, however, remain attractive.

- Social inclusion programmes: substantial numbers of older people – in current as well as succeeding cohorts – remain trapped in a cycle of educational and social disadvantage. Higher education institutions, with partners such as local authorities, community colleges and the major national charities, should focus on 'widening participation' for older as well as younger age groups.

- Health and social care programmes orientated to professionals working with older people: these could run from foundation degrees through to modules for continuing professional development, with the theme of maintaining 'active ageing' as a key component.

10 Specific areas for development in universities might include:

- Piloting new undergraduate curriculum areas relevant to a cadre of service professionals working on behalf of older people: the demand for undergraduate programmes in gerontology is untested in the UK context but is a major area in the United States.

- Developing modules on 'active ageing' as a component in professional training for health and social care professionals: this could be a core or 'elective' on undergraduate programmes and/or part of continuing professional development.

- Developing outreach programmes targeted at older people: this could be done in partnership with further education colleges or as a feature of new university centres within local communities.

- Establishing centres/institutes for learning in retirement in geographical areas with substantial ageing populations: these could be co-funded ventures working with primary care trusts, further education colleges and local authorities. They could combine health promotion and educational issues. They could build upon the existing adult education tradition but develop new programmes appropriate to a cohort of older people with an extended period of initial and higher education.

- Developing educational programmes that support new forms of civic engagement in later life: areas such as 'environmental citizenship' and legal studies in 'human rights and community action' may be especially attractive to the baby boom generation.

- Linking with regional development agencies to establish co-funded projects with employers around training programmes targeted at older workers: this may be especially important given pressures to reduce training opportunities for workers in a period of economic recession.

- Targeting the 50-plus self-employed group, many of whom will be career/job changers with specific training requirements.

- Establishing partnerships with Age UK and other relevant voluntary organisations to develop educational programmes focused on tackling social exclusion in later life: co-funding through government and other agencies would be one avenue to explore. Developing innovative programmes that incorporate new social groups within the older population and those about to enter retirement should be a key strategy for educational policy.

- Developing ageing as a niche area for academic development but combining teaching older adults with a research focus.

11 Contents of the report:

- Sections 1–5 review the background to the discussion and highlight demographic and policy issues raising the profile of older learners.

- Sections 6–7 discuss the involvement of older learners in training and higher education.

- Sections 8–9 review barriers to participation in formal education compared with evidence of activity in non-formal, self-help groups.

- Section 10 reviews several initiatives and policy issues aimed at engaging older learners in higher education.

1
Introduction

1.1 In 2007, for the first time ever in the UK, the percentage of the population aged under 16 dropped below those of state pension age. In the same year there were 20.7 million people aged 50 and over. By 2032 there will be around 1 million more people among those aged 50 to 64, and a rise of around 1.5 million among those 65 and 69.[1] Even more striking is the projection that the majority of babies born since 2000 in the UK (and across most developed countries of the world) is likely to reach their 100th year.[2] These trends suggest that social institutions will need to find fresh ways of adapting to and supporting an ageing population. This report examines the contribution of higher education to this process.

1.2 The report examines the involvement of older learners (defined as those aged 50 and over) in training and higher education, and potential changes in patterns of demand given the expansion of this group over the coming decades. Educational activity covers a broad spectrum of programmes. Studying full-time for a degree in order to progress to a career is a substantially different activity to learning a foreign language for a few hours a week primarily as a leisure interest. Educational activity also encompasses a wide range of learning environments, from universities to vocational and professional training undertaken at local colleges, community centres or the workplace. These different types of educational pursuits, the environments within which they are undertaken and the duration of the course (for example, full- or part-time) can be considered as highly diverse market sectors within the education system.

1.3 Since the 1970s, there has been a rapid expansion of higher education, with the student population increasing from 621,000 to 2.4 million over the period 1970/01 to 2007/08. This development reflects the entry of previously under-represented groups (notably women) into the university system and the diversification of institutions, with the recognition of colleges and polytechnics as universities. At the same time, discussions have continued around the continuing failure of working-class groups to access higher education and the difficulties facing part-time as opposed to full-time students.[3]

1.4 In the UK, consideration of older learners has remained largely absent from debates about the future of higher education.[4] Only a small proportion of those aged 50-plus is involved in formal educational study. Much of the growth in the numbers of mature students on part-time undergraduate and postgraduate courses has been taken up by students in their 30s and 40s, with 50 remaining a dividing point at which educational activity goes into sharp decline (see section 7). This remains the case with formal educational activity; there is a more positive picture of informal activity, however, with the growth of various voluntary and self-help organisations (see section 9).

1.5 The fall in educational activity among those aged 50-plus has considerable significance for key areas within social and economic policy. UK public policy has embraced the concept of 'active ageing'[5] defined as: 'the process of optimising opportunities for health, participation and security in order to enhance the quality of life of people as they age'.[6] Within this approach, lifelong learning is identified as contributing to the social environment by supporting people in later life (see section 4).

1.6 When it comes to economic policy, promoting the employability of older workers has been a key development, with moves to increase pension ages and remove incentives for early retirement or early exit from the workforce (see section 5).[7] Attempts to extend working life for women and men in their 50s and 60s highlight a major challenge for improving the quality of work-based training (discussed in section 6); educational institutions have had to consider how they might provide appropriate forms of support.

1.7 Patterns of employment are also changing among a significant proportion of the population aged 50 and over. Many people are switching careers, with a trend towards self-employment and an interest in flexible working.[8] Those in transition between different types of employment are likely to contribute to demands for new types of education and training in order to achieve their career objectives.

1.8 Education policy documents such as *Building a society for all ages*[9] and *The learning revolution*[10] have focused on increasing access to education by older people. The *Inquiry into the future of lifelong learning* drew attention to the significance of demographic change, with the final report emphasising the importance of education for those aged 50-plus.[11] The higher education sector's interest in older learners has also been strengthened by the projected decline in undergraduate student numbers (especially among those aged 18–20) due to take place over the period 2009/19.[12]

1.9 A limited number of surveys is available reviewing trends in learning among older people (see section 2). Although this research provides information on important areas, such as the types of subjects studied and the courses available, it falls short in several ways. First, most surveys focus on the supply side of educational activity rather than on demand. They therefore reflect what is currently available in further and higher education for older learners, rather than the motives and aspirations of older learners themselves. Secondly, information about the educational activity of older learners collected over the past few years has been mainly concerned with current rather than future generations of older people. While there may be some similarities between the current and the future generations' choice of subjects and desired qualifications, it is reasonable to assume that future generations may have new needs and demands. The arrival of the post-1945 'baby boom' generation at retirement age, a generation with characteristics somewhat different to their predecessors, may increase the differences.[13]

1.10 As the cohort of people born immediately after the Second World War – the baby boomers – enters retirement, there is increased interest among policymakers in whether individuals within it will challenge traditional notions of ageing. The possibility of a break with the past arises in several different fields. As pioneers of the expansion in consumer culture during the 1960s, it may well be that baby boomers will continue to play a key role in shaping patterns of consumption as they move into old age.[14] Active ageing and associated leisure pursuits may become more commonplace and extend into late old age, with education a significant dimension. Higher rates of divorce and separation after the age of 50 may lead individuals to redefine their social identity with educational involvement an important element in this process.[15] These expectations, and the ways in which the first of the post-1945 birth cohorts are currently engaging in lifestyles different from those of previous cohorts, have important consequences for future educational activity among older learners.

2.1 There are not many direct sources of data on the current participation levels of older learners in educational activities. The Higher Education Statistics Agency (HESA) groups together mature and older learners in the category age 30 and above. Regular reports on the profile of universities, such as *Patterns of higher education institutions in the UK*[16], do not provide separate figures for the age group 50 and over. We have drawn upon a wide range of published sources, as well as secondary analysis of survey data, to illustrate the involvement of older people within the educational system. We also commissioned a more detailed breakdown of the age composition of undergraduate and postgraduate students from HESA (see further below). These data sources, however, use different definitions of adult learning. For this reason, we include in this section those definitions that the reader should refer to when interpreting the tables and figures throughout the report.

2.2 The main sources of government and official data are the Office for National Statistics and the Government Actuary's Department. These are used, together with data from the Learning and Skills Council, to provide information on educational qualifications in the general population. Relevant data have also been drawn from the publication *Social trends*, which is produced annually by the Office for National Statistics. Data from the Labour Force Survey have been extracted to provide information relating to training issues and older workers.

2.3 New data was also commissioned from the Higher Education Statistics Agency to provide a more detailed breakdown of age groups on undergraduate and taught postgraduate, full- and part-time courses. The selected years used in this report are 1998/99, 2002/03 and 2007/08.

2.3.1 The relevant tables refer to students on full-time and part-time modes of study. Full-time and sandwich/full-time students are those normally required to attend an institution for periods amounting to at least 24 weeks within the year of study, on thick or thin sandwich courses, and those on a study-related year out of their institution. Part-time students are those recorded as studying part-time, or studying full-time on courses lasting less than 24 weeks, on block release, or studying during the evenings only.

2.4 The National Institute of Adult Continuing Education (NIACE) undertakes annual surveys of adult participation in learning, the results of which have been drawn upon in this report.[17] We have also used data from the 2005 survey published as *What older people learn*.[18] NIACE's definition of learning is: '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 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'. Following this definition, NIACE creates two indicators – the percentage of respondents who are currently undertaking some learning activity (NIACE 1) and the percentage who are currently doing some learning activity or have done some learning activity in the last three years (NIACE 2). This distinction is highlighted in chart 7.

2.5 We have undertaken secondary analyses of existing data sources to supplement the NIACE studies and other official sources. These have been drawn from the English Longitudinal Study of Ageing (ELSA), a dataset that contains information on approximately 12,000 persons aged 50 and above, the Survey of Health, Ageing and Retirement in Europe (SHARE), the British Household Panel Survey (BHPS) and the Annual Population Survey.

2.5.1 Data from ELSA are taken from the Waves 1–3 (Wave 1, 2002/03; Wave 2, 2004/05; Wave 3, 2006, 2007). The data are presented cross-sectionally. In each Wave, respondents were given a show card and asked: 'Did you do any of these activities during the last month?' The listed activities included 'attended a formal education or training course'. Respondents were also specifically asked: 'Did you attend a formal education or training course in the last 12 months?' We have combined these two sources of information to give a single variable 'attended a formal education or training course in the last 12 months'.

2.5.2 Data from the Survey of Health, Ageing and Retirement in Europe is taken from Wave 1 (2002/03). Respondents were given a show card and asked: 'Did you do any of these activities during the last four weeks?'; the activities included 'attended a formal education or training course'.

2.5.3 Data from the British Household Panel Survey are taken from Wave O (2005/06). As in previous years, respondents were asked about their participation in training schemes or courses. The precise question was: '(Apart from the full-time education you have already told me about) have you taken part in any other training schemes or courses at all since 1 September 2005 or completed a course of training which led to a qualification? Please include part-time college or university courses, evening classes, training provided by an employer either on or off the job, government training schemes, Open University courses, correspondence courses and work experience schemes (excluding leisure courses, but including continuing courses started)'. The interviews were undertaken between September 2005 and April 2006, meaning that respondents who answered positively to this question had taken part in a training scheme or course within the past six months.

2.5.4 The Annual Population Survey comprises variables from the Labour Force Survey, with key topics including education, employment, health and ethnicity. The 2008 survey has been drawn upon for analysis of the type of learning programmes undertaken across different age groups.

2.6 We also made an extensive search of relevant national and international websites for material about education and older learners and drew on a review of this area by Anderson[19], produced for the Association of Educational Gerontology. A report published by the American Council on Education[20] also provided a valuable framework for understanding recent initiatives in the United States.

3.1 The ageing of populations was one of the most important developments of the 20th century and will raise major challenges for life in the 21st. The proportion of the UK population aged 65 and over has increased steadily over the past 30 years: from 13 per cent of the population in 1971 to 16 per cent in 2008 and projected to reach around 20 per cent by 2026. Projected growth in the UK population over the next 10 and 20 years was revised substantially upwards with the release of 2006-based population projections (table 1). By 2033, 23 per cent of the population is projected to be aged 65 and over compared to 18 per cent aged 16 or younger.

3.2 Population ageing will vary among the countries of the UK and within each country. In England, the Audit Commission[21] highlighted the fact that although all local authorities will be affected by demographic change, some will be affected more than others. For example, in 2009, West Somerset Council had the highest proportion of people aged 50 or more (53 per cent), while the London Borough of Tower Hamlets had the lowest (16 per cent). In 2019, the proportion of people aged 50 or more in Tower Hamlets will remain low at 17 per cent, while the proportion in West Somerset will have grown to 60 per cent. Localised variations may be highly significant for some universities when planning their approach to demographic change.[22] Taking the period 2009–2019, for example, the biggest increase in the proportion of people aged 50 and over will affect South Staffordshire Council, with an increase from 42 per cent to 49 per cent (reaching 51 per cent by 2029). The City of Bristol's population will show the smallest change between 2009 and 2029. The area's population of people aged 50 or more will be around 28 per cent in 2009, and is set to remain at less than 30 per cent by 2029.

3.3 The increasing number of older people is accompanied by greater diversity. At age 65, average life expectancy in the UK stands at 17.4 years for men and at 20 years for women. With the lengthening of the typical lifespan, experiences of later life now vary hugely from the late 50s to the 90s. The older population is also becoming more ethnically diverse, with the early waves of post-war immigrants now well into retirement. Equally, there are substantial variations in lifestyles, reflecting the influence of gender and social class over the life course. At the same time, the number of people with severe disabilities is rising, reflecting the extent of medical advances over recent decades and improvements in survival rates from serious illness.[23] The fastest growing age group in the population is those aged 80 and over, increasing by over 1.1 million between 1981 and 2007 or from 2.8 to 4.5 per cent as a proportion of the total population.

3.4 An important driver of population change over the next 20 years is the combination of the increase in fertility rates that took place in separate waves between 1945 and 1973, commonly referred to as the 'baby boom', and the continuing increases in life expectancy. In England (and the UK generally), fertility rates rose dramatically around 1946, declined until around 1953, and then rose again to reach a peak around 1964. This has led commentators to refer to 'early' and 'late' boomers, with early boomers having been born immediately after the second world war, and late boomers during the late 1950s and early 1960s (chart 1).[13]

Table 1
UK population growth projections, 2006

	2018		2028	
	Growth over next 10 years	Revision since 2004	Growth over next 20 years	Revision since 2004
Over 50s	3.5m (17%)	+100k	6.2m (30%)	+430k
Over 65s	2.3m (24%)	+100k	4.9m (49%)	+350k
Over 80s	640k (25%)	+120k	2.2m (79%)	+330k
Total population	**4.5m (7%)**	**+1.9m**	**8.6m (14%)**	**+3.6m**

Source: *National Populations Projections 2006-based* Office for National Statistics, 2008

Chart 1

Fertility rates in England, 1935–2000

Source : Institut National d'Etudes Démographiques (INED)
www.ined.fr/en/pop_figures/developed_countries/situation/one_indicator/

3.5 These two peaks of the baby boom will have a significant impact on the population of 50–59 year olds (a key group of older learners) over the next 20 years. In 2008, the 'early' baby boomers started to reach retirement age and it is likely, given the higher qualifications among this group, that they will have greater expectations than previous generations in areas such as leisure and education. However, between 2008 and 2019, the ageing of the 'late' baby boomers will significantly boost the number of 50–59 year olds. The number of 50–54 year olds in the population is set to increase from 2008 to 2018, and the number of 55–59 year olds is set to increase from 2010, reaching a peak in 2023. Moving down to those in their mid to late 40s – where there may be a substantial demand for part-time higher education – the number of 45–49 year olds in the population is set to increase over the period up to 2013 (chart 2).

Chart 2

Population projections of the UK (thousands by age band), 2008–31

Legend: 45–49, 50–54, 55–59, 60–64, 65–69
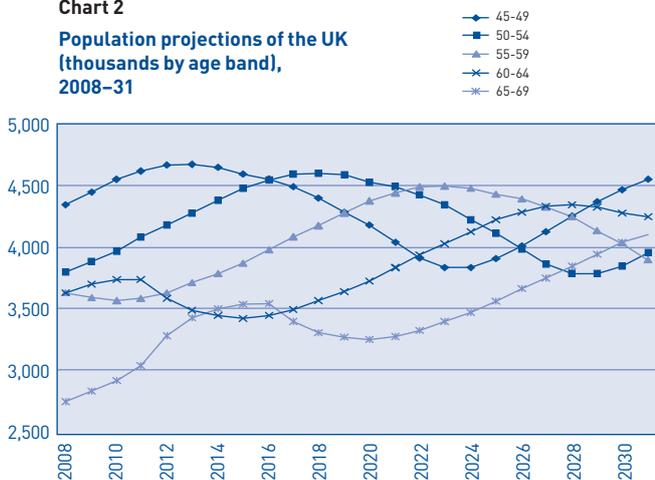
Source: Office of National Statistics, Government Actuary's Department, Online data base,
http://www.gad.gov.uk/Demography_Data/Population/Index.asp

3.6 Similar trends can also be seen in chart 3. Whereas the major increase in the population of 55–64 year olds will take place between 2011 and 2021 (for men, from 3.6 million to 4 million; for women, from 3. 8 million to 4. 2 million), the population of 45–54 year olds will decrease slightly between the years 2011 and 2021.

Chart 3

Population by sex and age, United Kingdom, 2001/21

Legend: 45-54, 55-64, 65-74, 75 and over

Men

Women
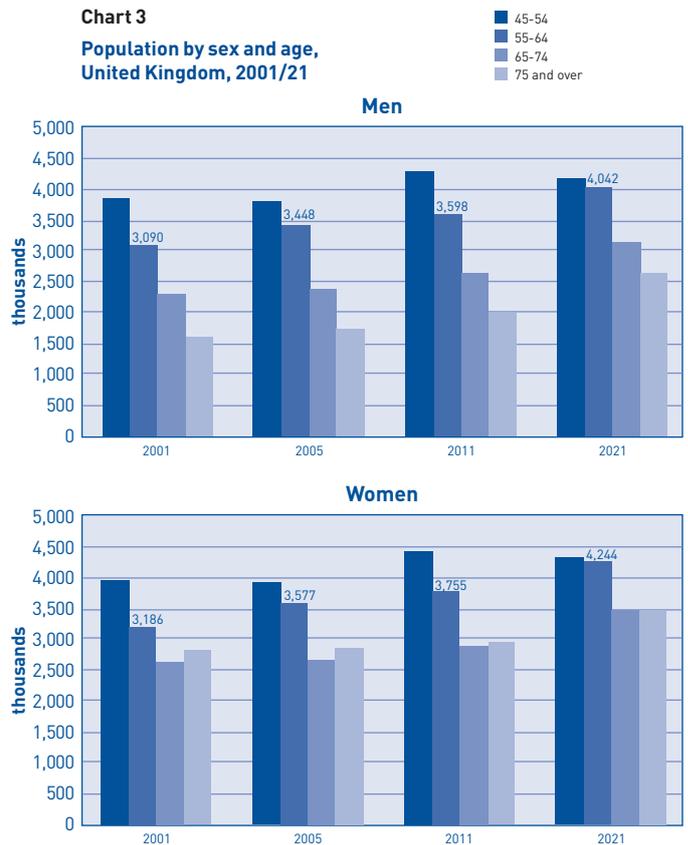
Source: Social Trends, 37, Office for National Statistics, 2007

3.7 In 2021 there will be nearly 1 million more adults between the ages of 55–64 than in 2011. If predictions concerning the changing aspirations of the late baby boomers are correct and lifelong learning becomes established as an individual aspiration as well as part of government policy, then the growth of this segment of the population could have a significant impact on educational policy.

3.8 The various age groups will demand different activities. Among those aged 45–54, the demand for job training and professional courses is likely to increase, since many people in this age group will still have a substantial number of working years to complete before they are eligible for a pension. Current employment patterns are often characterised by either forced or desired employment and career changes (see section 5). If this pattern continues, as appears likely, there could be sufficient demand from those affected to stimulate new forms of participation within higher education. Among those aged 55–64 (currently under-represented in higher education) it is reasonable to assume (given pressures to extend working life) that there will be a demand for employment-related as well as leisure-based forms of education.[11]

3.9 An expansion in demand for educational activities among the 65-plus population is also likely. In 2007, nearly 50 per cent of the age cohort 50–54 had a Level 3 qualification or above. In 2021, this cohort will be in their mid to late 60s. Given that previous levels of education influence further demands over the life course, it is reasonable to assume that many of these newly retired and well-educated individuals will seek leisure-related educational activities, particularly revolving around the arts and related areas. Much of this will be driven by ideas around active ageing that began to receive attention in European social policy from the late-1990s onwards.[24] The next section traces the evolution of this policy, highlighting its relevance for activities within education.

4
Active ageing and the value of learning in later life

4.1 The concept of 'active ageing' emerged during the United Nations' Year of Older People in 1999 with subsequent elaboration by the European Union[24] and the World Health Organisation (WHO).[6] Walker[25] suggests that the idea built upon an earlier debate in the United States around notions of 'successful'[26] and 'productive' ageing.[27] The notion of 'successful ageing' focused upon the need to replace new roles and relationships for those lost in middle age; the idea of 'productive ageing' developed the theme of older people maintaining activities that would defray some of the costs associated with ageing. The idea of 'active ageing' recasts the issues of adjustment in later life by focusing on older people maintaining a broad spread of relationships and activities.

4.2 Education can provide a major contribution to improving the quality of later life. For example, the WHO[6] report maintains that social policies which support active ageing will result in fewer disabilities associated with chronic diseases in older age and will lead to more people enjoying a positive quality of life. Opportunities for education and lifelong learning are cited as part of the social environment contributing to maintaining the health and security of people as they age. The WHO report underlines the association between the employment problems of older workers and low levels of education, stressing the need for continuous training in the workplace and lifelong learning opportunities in the community. The report also highlights the potential of 'intergenerational learning' (see section 9) to help bridge age differences and enhance the transmission of cultural values.

4.2.1 Within England and Wales, the theme of active ageing underpins three government policy documents: *Winning the generation game: improving opportunities for people aged 50–65 in work and community activity*, published in 2000 by the Performance and Innovation Unit (PIU) of the Cabinet Office[28], the Department for Work and Pensions' *Opportunity age: meeting the challenges of ageing in the 21st century'*, published in 2005[29], and its follow-up *Building a society for all ages*[9], published in 2009.

4.3 *Winning the generation game* highlighted the 'sharp decline in the number of people working in their 50s and early 60s, with two out of five of those in their 50s either unemployed or economically inactive'. It focused on 'enabling and encouraging the over-50s to stay in work' and 'helping and encouraging displaced workers to re-enter work'. Its practical policy suggestions included providing career information for older displaced workers, reducing incentives for early retirement, encouraging lifelong learning and promoting flexibility in employment.

4.4 *Opportunity age* set out a government strategy for active ageing, emphasising a '...vision where later life is as active and fulfilling as the earlier years, with older people participating in their families and communities' [para 30]. Learning and continuing education was viewed as an important element in achieving this objective, with evidence showing how education could ease major transitions in the second half of life. The document proposed:

- removing the age limit attached to educational loans

- prioritising public funds and help for those with no qualifications to achieve a Level 2 qualification

- protecting learning for personal interest, while indicating that some groups of older people would have to pay more for their courses in the longer term (paras 3.26 and 3.28).

4.5 The successor document, *Building a society for all ages*, continued to emphasise the importance of learning but mainly through 'informal' networks as an 'essential social activity' (para 23) rather than involving formal institutions such as universities or further education colleges.

4.6 An important aspect of social policy has been concerned with challenging social exclusion, defined as the process whereby groups such as older people are marginalised from key areas and institutions within society. Although the link with learning and active ageing was not developed within this policy, in 2006 the final report of the Social Exclusion Unit (SEU) *A sure start to later life: ending inequalities for older people*[30] identified lifelong learning as an area to be tested in pilot programmes aimed at empowering older people within communities. Age Concern England[31] and Help the Aged[32] (now merged as Age UK) have also both stressed the value of lifelong learning and the role of education in tackling social exclusion.

4.7 The Audit Commission has assessed the success of local authorities in promoting active ageing[21], as expressed in *Opportunity age*.[29] The commission concluded that only about a third of councils in England were well prepared for an ageing population and that older people tend to experience councils as organisations that focus on their care needs rather than seeing them as having any wider aspirations and supporting them as learners and volunteers. It called for services that would focus on the underlying causes of dependency in later life.

4.8 The idea of active ageing has been a significant policy initiative, one with considerable implications for the field of education. However, the precise role of education has yet to be fully articulated, with higher education in particular rarely mentioned in relevant policy documents. This absence of focus on higher education is reinforced by the fact that arguments about the importance of learning for older people have tended to come more from government departments and agencies linked to employment, health and social care, with training and education viewed as important in promoting employment in later life.[33] It is also relevant to note here that the Public Service Agreement covering people aged 50 and over (PSA 17) makes no mention of education as an area that might promote 'independence and wellbeing' among older people.[34]

4.9 Active ageing might also be linked to the policy of 'lifelong learning', which gathered momentum in educational and social policy thinking through the 1990s.[35] On the surface, adopting this perspective might have encouraged a focus on the needs of older learners. The 1988 Green Paper *The learning age*[36] emphasised the importance of widening access to learning in the following terms:

> 'This country has a great learning tradition. We have superb universities and colleges which help maintain our position as a world leader in technology, finance, design, manufacturing and the creative industries. We want more people to have the chance to experience the richness of this tradition by participating in learning. We want all to benefit from the opportunities learning brings and to make them more widely available by building on this foundation of high standards and excellence' [para 9].

4.10 Feinstein and colleagues suggest, however, that despite this rhetoric '... the Government's commitment to achieving this objective has focused on the demand by and provision for young full-time learners following on from school or in further education settings'. And they highlight the point that, 'More recent policy documents focus on the value of lifelong learning that develops skills that have an obvious labour market objective rather than lifelong learning that promotes wider benefits such as personal development and citizenship...' (page 3).[37]

4.11 Learning in later life might be seen as a significant contributor to active ageing, given the evidence about its role in improving the quality of life in old age. Its contribution has been identified at three different levels:

- assisting transitions through middle and later life

- postponing or delaying some of the physical and mental problems associated with ageing

- developing social contacts and support in old age.

4.12 Adult learning may be especially important in boosting self-confidence about the ability to cope with the social changes associated with ageing. Dench and Regan[38], in a study commissioned by the then Department for Education and Employment, investigated the impact of learning on older people. They reinterviewed 336 respondents aged between 50 and 71 who had first been interviewed in 1997 for the National Adult Learning Survey (NALS). Respondents reported that learning had led to increases in their self-confidence, enjoyment and satisfaction with life, positive changes in how they felt about themselves and their ability to cope with everyday living.

4.13 There is some research that supports the suggestion that education delays some of the physical and mental problems associated with ageing. Jagger[39], drawing on the longitudinal Medical Research Council Cognitive Function and Ageing Study , reported higher levels of education to be associated with increasing longevity and increased years free of disability. Findings from the study pointed to the important link between initial full-time education and impaired mobility in later life:

> '...having nine or less years of full-time education compared to those with 12 or more years was associated with being 70 per cent more likely to become mobility disabled in men and 50 per cent more likely in women. These differences were adjusted for the greater disease burden in the lower educated and thus inequalities in disability were not solely due to poorer health in the lower educated. With regard to recovery, men and women at lower educational levels were significantly less likely to recover from mobility disability although in women this accounted for the greater burden of other health problems' (page 9).

Jagger argued that education may be a factor helping people 'adapt to increasing disability either through modifying tasks or employing technical aids', and that 'later life could be an opportune time to provide education about strategies to compensate for failing function' (page 9). The potential of using learning in later life to 'compensate for ageing'[40] raises significant issues both for training future professional workers and for older learners themselves.

4.14 Sorenson[41] made similar points about dementia, suggesting that 'people with a higher level of educational achievement experience the onset of dementia later than people with lower educational achievements'. She noted, however, that dementia once diagnosed appears to progress much faster in people with higher educational achievement: 'This has lead clinicians and psychologists to talk about people with higher education having a bigger cognitive reserve. We think this group probably develop[s] dementia in the same way as other[s], but that people with a bigger cognitive reserve can mask the symptoms of the developing dementia for a while'.

4.15 More research is needed on the potentially beneficial role of mental stimulation in later life, with evidence suggesting that it can assist in reversing memory decline[42], as well as promoting wellbeing and life satisfaction.[43] *Mental capital and wellbeing*, the report of the Foresight Project[44], highlighted the extent to which 'the talents, skills, and experiences of older adults are vastly under-used, and this can affect both their mental wellbeing and the maintenance of their mental capital and capacity' (page 214). The report noted that, despite evidence about the potential of learning to protect against cognitive decline, current educational policies were overwhelmingly focused on younger people and those in employment.

4.16 Education may also play an integrative role in securing access to new social ties. Social networks in the form of friends and associates have been identified as an important source of life satisfaction and wellbeing in old age.[45] Educational activities, provided through formal and informal routes, may be important both in maintaining as well as replacing relationships depleted through retirement and the death of close friends. Age Concern England[31] concluded that:

> '...learning can be a way of moving into a new phase of life and making new social ties. One of the reasons people can have negative feelings... [about]...retirement is a fear of isolation and a lack of purpose to life without employment. Learning therefore provides not only a meaningful activity in itself, but also the social networks to replace those of the workplace. It can help retired people adapt their skills to play a constructive role in society, whether in voluntary activity or through the pursuit of interests that has meaning to the individual' (page 15).

Help the Aged[32] has identified the importance of learning as a means of tackling inequality, concluding that 'Learning for learning's sake and the acquisition of new skills are not necessarily different things but there needs to be an awareness of the new types of skills – such as financial literacy, ICT literacy, health literacy and citizenship literacy – older people need to prevent them drifting into isolation and exclusion' (page 1).

4.17 The potential role of education –and higher education in particular – in developing active ageing is addressed in section 10. The next section reviews changes in work and employment that underpin many of the assumptions behind policy initiatives about older people.

5.1 An important context for active ageing, especially in relation to education, has been the changes affecting work and retirement. In recent years, issues relating to older workers and retirement have become major influences in the development of economic and social policy. In part this has reflected significant changes to retirement as a social institution. Donald Hirsch[46] has observed that, throughout the 20th century, the idea of a fixed point of leaving work – at age 60 or 65 – developed as one of the great certainties of life, especially for men. Modern retirement policy was itself a product of the late 19th century, as large private companies and branches of the civil service adopted pension policies of different kinds. Subsequently, at certain periods in the 20th century (during, for example, periods of economic depression), pension provision was extended to a wider range of groups. Modern states became responsible not only for the income maintenance of substantial sections of the older population but also for determining the rules governing access to different pathways into retirement.[47]

5.2 Over the past 10 years these 'pathways' or 'transitions' have become more diverse:

- Of people leaving full-time permanent jobs between 50 and state pension age, as many now enter part-time or temporary positions or become self-employed as leave work altogether.

- While men (more than women) are much more likely to leave work before state pension age than a generation ago, policies now emphasise later rather than earlier retirement.

5.3 Changes to retirement as an institution have been one element driving a number of significant debates within economic and social policy. Early retirement, while accepted (and indeed in part promoted by government policy) over the course of the 1980s and early 1990s, came under scrutiny from the late 1990s onwards. Government and pressure groups such as The Age and Employment Network (TAEN) argued for limiting the withdrawal of people aged 50 and over from the workplace, and encouraging those economically inactive back into work.[29,9] Employment rates for older workers in fact increased during the 1990s and 2000s. For men aged between 50 and state pension age they rose from 66 to 72 per cent. For women in the same age group they rose from 59 to 71 per cent. Over the same period, the percentage of people working past state pension age rose from 8 to 12 per cent.

5.4 Policymakers' focus on older workers has reflected several issues:

- labour market pressures arising from the increase in older people in the workplace (projections indicate that around 32 per cent of the working age population will be aged 50 and over by 2021)

- pension reforms (for example, the 2007 Pensions Act) aimed at extending working life and encouraging greater flexibility about when to retire

- concern over the desirability of early retirement, with the social and personal costs emphasised in documents such as *Winning the generation game* and *Opportunity age.*

5.5 People entering their 50s, however, face a number of changes. Moen[48] identified an emerging life stage between the years of career building and old age, a period stretching roughly from 50 to 75. She perceived this new phase as creating a mixture of uncertainties and opportunities: the uncertainties reflected in pressures and insecurities in the workplace (with downsizing and compulsory early retirement); the opportunities developed through a broadening in the range of productive activities (with combinations of work, caring and leisure activities). Schuller and Watson[11] highlighted the importance of a 'third stage' within the life course, reflected in 'alternative careers, new interests, a new mix of paid and unpaid work, [and] new family patterns' (page 95).

5.6 Some of these developments are reflected in the emergence of so-called 'bridge jobs', along with the rise of self-employment, these becoming increasingly common among women and men in their 50s and 60s. Research by Cahill and colleagues[49], using data from the US Health and Retirement Study (HRS), found that most older Americans leaving full-time career employment (about 60 per cent of those leaving a full-time career job after 50 and about 53 per cent of those leaving after the age of 55) moved first to a 'bridge job' rather than directly out of the labour force. Analysis of the UK British Household Panel Survey, examining job changes among men in their 50s, indicated that around one in five had had spells of part-time, bridging forms of employment.[50]

5.7 On the one hand, such movements might be taken as signs of increasing choice for individuals in reshaping the ending of their work careers. The reality, however, may be otherwise, with many workers moving into 'bridge employment' out of financial necessity and often into contingent or 'non-core' areas of the workforce.[49] On the other hand, people may be withdrawing from the workforce because they want to find a new direction to their lives. In the survey by Humphrey and colleagues[51], almost a quarter (23 per cent) of those who had taken early retirement had done so to 'enjoy life while they were still fit and young'. Among those intending to retire early, 83 per cent gave this response.

5.8 A trend among professional and managerial groups to view their 50s as an appropriate point to 'take stock' and possibly leave full-time employment was identified by Scales and Scase[52] in their report *Fit and fifty*, published by the Economic and Social Research Council (ESRC). They found that by the end of the 1990s some groups harboured a firm 'expectation of early retirement', with a desire for building a new life beyond their main careers – even in the face of potential financial pressures. This study pointed to changes in priorities over the life course, with an increasing number of people wanting a different direction to their lives. Higher education, especially for the 'baby boom' cohort, could play a major role in reinforcing this trend.

5.9 Whether expecting to retire early will be a brief phenomenon (characteristic of the first baby boom generation) or will become more permanent has important implications for attempts to extend people's working lives as well as for training and education. Changing attitudes to early retirement may encourage flexible working of different kinds. People may, however, resist taking on the sort of work which they perceive as failing to add to the quality of daily life in middle and older age[53].

5.10 Active ageing may become embedded in the life course in two main ways through:

- the desire or necessity to maintain one's existing career or employment

- the move (again through choice or necessity) into new forms of activity, employment-based or related, or in a new direction entirely (leisure or education-based, voluntary activity or some other form of civic engagement).

5.11 How far can education and training provide support during the transitions associated with extended working life or the new forms of engagement associated with family and community life? The main sections of this report address this issue, beginning with evidence about the extent of support from employers.

Responses from employers to older workers and older learners

6.1 The benefits of learning and training, across all age groups, are now widely acknowledged. The former Department for Education and Skills[54] pointed to evidence that 'older people can benefit substantially from continuing to learn and gain new skills' (para 210). Given the plans to put back retirement age, the expectation must be that older workers will have the same opportunity as younger people to take part in different types of training and learning. However, evidence suggests that older workers continue to be disadvantaged when it comes to receiving training while employed.

6.2 Table 2 confirms the gradual decline in job-related training over the life course. Chart 4 reveals, however, that the decline is not necessarily because of a drop in demand for work-related training, with this holding up in particular for those in the 40–55 age group. The falling away after age 55 though is noteworthy, reflecting both discrimination in access to training as well as negative attitudes among older workers themselves.

Table 2

Employees receiving job-related training[1] by age and sex, United Kingdom, 2008[2]

	Percentages	
	Men	Women
16–17	26.4	15.6
18–24	19.0	19.8
25–34	14.6	17.2
35–49	11.9	16.6
50–59/64[3]	9.2	12.9

1 Employees (those in employment excluding the self-employed, unpaid family workers and those on government programmes) who received job-related training in the four weeks prior to interview

2 Data are at Q2 (April–June) and are not seasonally adjusted

3 Men aged 50–64 and women aged 50–59

Source: *Social Trends* 39 Office for National Statistics, 2009

Chart 4

Percentage of employees who would like work-related training
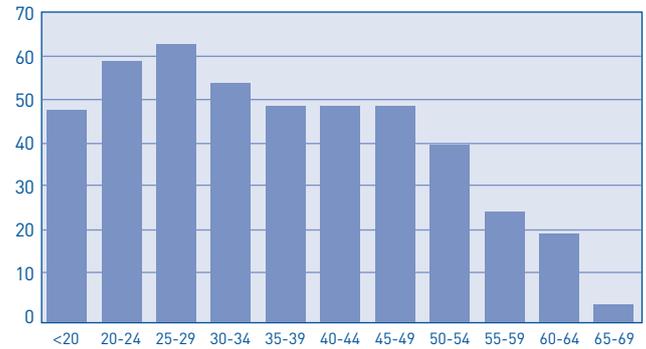
Source: BHPS, Wave O (2005); authors' analysis

6.3 Humphrey and colleagues[51] found that while most employees received some encouragement to learn more job-related skills, this encouragement tended to fade after 50–54. Thus among men, 58 per cent had received a 'great deal' or a 'fair amount' of encouragement, this compared with 41 per cent for those aged 60–64 and 35 per cent for those who were 65–69. Among women, the equivalent figures for the 50–54 and 60–64 age groups were 63 per cent and 40 per cent.

6.4 Lissenburgh and Smeaton's[55] analysis of Labour Force Survey data confirmed the link between increased age and declining access to training. Logistic regression models suggested that men and women in part-time and temporary employment were especially disadvantaged. Humphrey[51] also found that part-time employees were less encouraged to learn more job-related skills than full-time colleagues: a third of part-time employees were offered no encouragement, compared with a quarter of full-time employees. Comparative data also show Britain performing below the OECD (Organisation for Economic Co-operation and Development) average for expected hours in job-related education and training.[56] Analysis of data from the Survey of Health, Ageing and Retirement in Europe also supports this (chart 5).

Chart 5

Percentage aged 50-plus who have attended a formal education or training course during the last month by age cohort, Europe

Legend:
- 45-54
- 55-64
- 65-74

Switzerland
Sweden
Denmark
Belgium
Netherlands
England
Germany
France
Greece
Austria
Spain
Italy

0 5 10 15 20 25 30 35
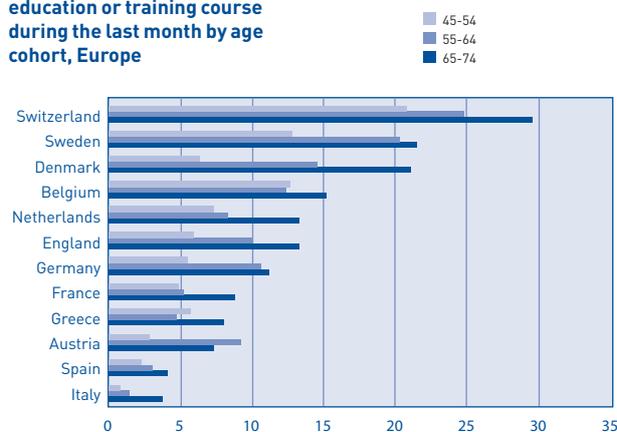
Source: Survey of Health, Ageing and Retirement in Europe (SHARE), Wave 1; ELSA, Wave 2; authors' analysis

6.5 We do not know enough about why older workers fail to take up opportunities for education and training. They may lack confidence about learning new skills[57] or feel that acquiring them is unnecessary or may go unrewarded[58]. Taylor and Urwin's[59] research suggested that declining participation in training was linked to employers' decisions rather than an individual preference not to undertake training. Urwin[60], on the other hand, argued that not only may training be less likely to be offered to older individuals, but also that 'large proportions of this group have not taken up the opportunity to train'. Moss and Arrowsmith[61] concurred, suggesting that 'attitudinal barriers' can limit responses to training: '...some [Jobcentre] customers may either feel that it is too late in their life to learn basic skills that they have managed to survive without for so long, or, if they have worked before, that they do not need a course that offers basic employability skills' (page 24).

6.6 Employers vary considerably in their approach to training. McNair and colleagues[62] found that in large firms people continued to develop skills more regularly than those in small and medium-sized enterprises. Some occupational sectors (notably managerial and professional groups) were more likely to provide training than others (for example those in elementary occupations). And level of skill and qualification (or human capital) appears critical – those with higher degrees and/or professional qualifications were more likely to participate in training later in working life than those with lower level qualifications. For professional/managerial groups, external pressure to extend working life may not be a major issue given that higher qualifications and socio-economic class are strong predictors of longer working life.[62] For some manual groups, lack of training may be difficult to make up for in later life, especially given limited workplace opportunities and depressed expectations about learning.

6.7 Among unemployed and economically inactive people, Newton and colleagues[58] found that less than one in 10 reported involvement in training and that training participation declined rapidly with age. The likelihood of someone aged 55 and over participating in training was 50 per cent less compared with an adult aged 35–44. McNair and colleagues[62] found that levels of support given to those changing their job declined with age. Older workers were less likely than younger ones to receive any help during a job transition (37 per cent of older workers, against 47 per cent of those under 50). They were less likely to receive training from their employers, help from their workmates and colleagues, or support from a government agency. They were also less likely to have sought out support for themselves, either through the internet or other informal sources.

6.8 Against the above, largely negative findings, must be balanced more positive developments which may be important over the medium and longer term. Future generations of older workers can be expected to have higher levels of basic numeracy and literacy skills and this should have a major impact on areas such as participation in continuing education and training. Dixon[63] noted from the Labour Force Survey the strong relationship between level of qualification and the likelihood of undertaking job-related training; those with higher existing qualifications were also more likely to be studying for a new qualification. She concluded that 'these relationships suggest that age-specific differentials in learning activity could flatten in future as the fraction of older workers who have not completed secondary education gradually declines' (page 74).

6.9 Evidence suggests that older people are just as willing to invest in learning new skills as younger age groups. Taylor and Urwin[59] found that, despite the shorter time horizons of those in the 50–64 age group, a similar proportion to those in the 25–39 and 40–49 age groups (20 per cent) had self-financed their own training. Economic growth in the second half of the 1990s may have had some impact in reducing training differentials between age groups. Urwin[60] suggested some 'catch-up' in the period 1992–2002 when comparing the training received by older and younger workers, reflecting a cyclical component with improved economic prospects allowing firms to increase the amount of money allotted to formal education and training. Conversely, periods of economic recession may introduce new forms of discrimination against older workers, especially in areas such as training and education.[64, 65] Training in the workplace is, however, just one element in a range of educational possibilities open to older learners. The next section of the report examines take-up through formal education and higher education in particular.

Responses to older workers and older learners within formal education

7.1 This section examines participation by older learners in formal education and higher education in particular. We have drawn on a variety of sources, most of which focus on different age groups in the 50-plus age band, but with some analysis of younger age groups for comparison.

7.2 The level of older learners' qualifications has an obvious impact on their access to higher education. Table 3 shows that 17 per cent of men aged 50-64 and 12 per cent of women aged 50-59 have a degree or equivalent or higher; among those aged 40–49 the figure for men is 21 per cent and for women 18 per cent.

Table 4 illustrates this point through NVQ levels: around one in three people in their late 40s and early 50s has a level 4 qualification or above; and nearly one in two level 3 and above. Conversely, 16 per cent of those aged 50–54 and 20 per cent of those aged 55–64 are recorded as having 'no qualifications'.

Table 3

Highest qualification held[1] by sex and age, 2005[2]

Great Britain						Percentages
	Degree or equivalent or higher	Higher education qualification[3]	GCE A level or equivalent	GCSE grades A* to C or equivalent	Other qualification	No qualification	All
Men							
16–19	–	1	27	43	9	20	100
20–24	15	6	38	23	11	8	100
25–29	29	7	23	19	13	9	100
30–39	24	8	24	20	14	10	100
40–49	21	9	28	17	13	12	100
50–64	17	9	31	11	13	19	100
All men	**19**	**8**	**28**	**19**	**13**	**14**	**100**
Women							
16–19	–	1	31	45	7	16	100
20–24	18	6	34	23	9	9	100
25–29	30	8	20	22	11	9	100
30–39	22	10	17	29	12	10	100
40–49	18	11	14	29	12	15	100
50–59	12	12	12	21	16	27	100
All women	**17**	**9**	**18**	**27**	**12**	**15**	**100**

1 Men aged 16 to 64, women aged 16 to 59

2 January to December. See Appendix, Part 4: Annual Population Survey

3 Below degree level

Source: Office for National Statistics

Table 4

Level of highest qualification held by people aged 19–64 in England, 2007

	All people aged 19–59/64[2] (thousands)	Level 7–8	Level 4–6	**Level 4 and above**	Level 3	**Level 3 and above**	Level 2	**Level 2 and above**	Below level 2	No qualifications
				Percentage of people ages 19–64 qualified at each level[1]						
By age										
19–24	4,079	2.0	17.6	**19.6**	34.1	**53.7**	21.8	**75.5**	16.7	7.8
25–29	3,360	8.5	29.5	**38.1**	19.6	**57.7**	19.3	**76.9**	15.5	7.6
30–34	3,277	10.4	28.7	**39.1**	18.4	**57.5**	18.9	**76.4**	15.7	7.9
35–39	3,775	8.6	25.0	**33.6**	16.0	**49.6**	20.6	**70.1**	20.9	9.0
40–44	3,936	7.6	25.1	**32.6**	16.3	**48.9**	20.9	**69.9**	21.2	9.0
45–49	3,562	7.3	23.5	**30.8**	17.6	**48.4**	20.3	**68.8**	19.1	12.2
50–54	3,107	7.4	22.8	**30.2**	16.8	**47.0**	19.4	**66.4**	17.3	16.3
55–64	4,505	6.5	19.9	**26.4**	17.9	**44.2**	19.2	**63.5**	16.4	20.1

1 Qualifications at level 7–8 include higher degrees, postgraduate level professional qualifications and NVQ level 5

Level 4–6 qualifications include foundation or first degrees, recognised qualification degree-level professional qualifications, NVQ level 4, teaching or nursing qualifications, HE diploma, HNC/HND or equivalent vocational qualification

Qualifications at level 3 include either two A-levels grade A–E, four AS levels graded A–E, an advanced GNVQ or NVQ level 3 or equivalent vocational qualification

Trade apprenticeships have been assigned to level 3 and level 2 in the ratio 50:50

Level 2 qualifications include either five GCSEs grade A*–C (or equivalent), an intermediate GNVQ, two AS levels, an NVQ level 2 or equivalent vocational qualification

Qualifications below level 2 include one or more GCSE grade G or equivalent (but less than five grades A*–C), BTEC general certificates, YT certificates, other RSA certificates, other City and Guilds certificates or NVQ level 1. Key Skills and Basic Skills qualification are also classified here

Those qualifications that do not fit into the existing pre-code list are recorded as 'Other' qualifications, along with all foreign qualifications and any other professional qualifications. People with an 'Other' qualification as their only, and therefore highest, qualification level are assigned to level 3, level 2 and below level 2 in the ratio 10:35:55

2 Males aged 19–64 and females aged 19–59

Source: Office for National Statistics

7.3 Set against the data on qualifications, how many older people are there in higher education? HESA statistics were commissioned for this report to examine participation on undergraduate and postgraduate taught programmes, full- and part-time. Tables 5-7 examine trends from 1998/99 to 2007/08 for first-year undergraduate (full- and part-time) and first-year postgraduate (taught only full- and part-time) students, across all age groups. The findings confirm the sharp drop after age 50 in these various modes of study. Full-time 50-plus students remain a tiny group within UK universities, with fewer than 4,000 first-year students on undergraduate and postgraduate courses in 2007/2008 (an increase of around 1,400 from 1998/1999).

7.4 Among part-time students, however, the 50-plus group is better represented, comprising 15 per cent of all first-year part-time undergraduates in 2007/08 (a similar proportion to 1998/99) and 10 per cent of first-year part-time postgraduates. This adds up to nearly 62,000 students across the UK (an increase of around 18,400 since 1998/99). Those aged 60 and over comprise 6 per cent of first-year students in the UK, a total of nearly 20,000 students (a slight fall though in percentage terms since 1998/99). The 50-plus sub-divide into three groups:

- those undertaking professional/vocational qualifications (sometimes supported by their employer)

- those taking non-vocational courses (for example, in adult and continuing education) – an important market for those aged 60 and over

- those studying for a degree but preferring a part-time route for financial, work-related or other reasons.

7.5 Tables 8-11 show what types of courses the 50-plus group and those aged 40-49 are taking, with information on the five most popular subject areas for first-year students. For full-time students who are 50-plus, the top two categories are in education and in subjects allied to medicine, reflecting the importance of teaching and nursing. Otherwise, there is a broad steer towards studies in the arts, humanities and social sciences. For part-time students, the 'combined' category comes top, with students (for example, in continuing education) studying programmes across a range of subject categories. The importance of language studies reflects personal interests and lifestyle changes associated, for example, with overseas travel among this group.[13]

7.6 Although the focus of this report is on those aged 50 and over, the importance of the age group immediately below is especially noteworthy. The number of first-year full-time students aged 40–49 in UK universities reached just over 17,000 in 2007/08, compared with nearly 13,000 in 1998/99. Numbers of first-year part-time students increased from 71,169 in 1998/99 to just over 96,000 over the same period (table 7). This group now represents around one in four of those studying part-time at postgraduate level and one in five at undergraduate level. Tables 8 and 9 shows these students' five most popular subject areas, with professional subject areas prominent for full- as well as part-time students.

Table 5

First-year students (excluding postgraduate research students) in the UK by selected academic year, age group and level of study, 2007/08

Academic year	Age group	Number/ (percentage) of students on *postgraduate* courses in UK within age group	Number/ (percentage) of students on *undergraduate* courses in UK within age group
1998/99	24 and under	52,704 (29.2%)	366,343 (58.8%)
	25–39	91,806 (50.9%)	161,630 (26.0%)
	40–49	28,436 (15.8%)	55,984 (9.0%)
	50–54	5,422 (3.0%)	15,193 (2.4%)
	55–59	1,302 (0.7%)	7,722 (1.2%)
	60 and over	829 (0.5%)	15,726 (2.5%)
Total 1998/99		**180,499**	**622,598**
2002/03	24 and under	75,989 (34.4%)	416,623 (58.3%)
	25–39	103,966 (47.1%)	175,996 (24.6%)
	40–49	30,583 (13.8%)	71,730 (10.0%)
	50–54	6,949 (3.1%)	18,444 (2.6%)
	55–59	2,515 (1.1%)	12,362 (1.7%)
	60 and over	877 (0.4%)	19,939 (2.8%)
Total 2002/03		**220,879**	**715,094**
2007/08	24 and under	92,854 (37.4%)	470,235 (59.6%)
	25–39	111,679 (44.9%)	184,185 (23.3%)
	40–49	31,617 (12.7%)	81,350 (10.3%)
	50–54	7,684 (3.1%)	20,164 (2.6%)
	55–59	3,252 (1.3%)	12,873 (1.6%)
	60 and over	1,415 (0.6%)	20,164 (2.6%)
Total 2007/08		**248,501**	**789,271**

Source: HESA Student record 1998/99 to 2007/08

Table 6

First-year students (excluding postgraduate research students) on *full-time and sandwich courses* in the UK by selected academic year, age group and level of study, 2007/08

Academic year	Age group	Number/ (percentage) of students on full-time and sandwich *postgraduate* courses in UK	Number/ (percentage) of students on full-time and sandwich *undergraduate* courses in UK
	24 and under	43,108 (51.2%)	325,353 (85.0%)
	25–39	35,710 (42.4%)	47,268 (12.4%)
	40–49	4,547 (5.4%)	8,204 (2.1%)
1998/99	50–54	613 (0.7%)	1,055 (0.3%)
	55–59	146 (0.2%)	379 (0.1%)
	60 and over	101 (0.1%)	308 (0.1%)
Total 1998/99		**84,225**	**382,567**
	24 and under	64,526 (53.8%)	360,658 (85.5%)
	25–39	48,837 (40.7%)	48,555 (11.5%)
	40–49	5,463 (4.6%)	10,497 (2.5%)
2002/03	50–54	787 (0.7%)	1,373 (0.3%)
	55–59	271 (0.2%)	543 (0.1%)
	60 and over	112 (0.1%)	372 (0.1%)
Total 2002/03		**119,996**	**421,998**
	24 and under	78,191 (56.5%)	396,852 (86.4%)
	25–39	53,028 (38.3%)	48,800 (10.6%)
	40–49	5,786 (4.2%)	11,159 (2.4%)
2007/08	50–54	929 (0.7%)	1,573 (0.3%)
	55–59	329 (0.2%)	575 (0.1%)
	60 and over	191 (0.1%)	340 (0.1%)
Total 2007/08		**138,454**	**459,299**

Source: HESA Student record 1998/99 to 2007/08

Table 7

First-year students (excluding postgraduate research students) on *part-time and other courses* in the UK by selected academic year, age group and level of study, 2007/08

Academic year	Age group	Number/ (percentage) of students on part-time and other *postgraduate* courses in UK	Number/ (percentage) of students on part-time and other *undergraduate* courses in UK
	24 and under	9,596 (10.0%)	40,990 (17.1%)
	25–39	56,096 (58.3%)	114,362 (47.6%)
	40–49	23,389 (24.8%)	47,780 (19.9%)
1998/99	50–54	4,809 (5.0%)	14,138 (6.0%)
	55–59	1,156 (1.2%)	7,343 (3.1%)
	60 and over	728 (0.8%)	15,418 (6.4%)
Total 1998/99		**96,274**	**240,031**
	24 and under	11,463 (11.4%)	55,965 (19.1%)
	25–39	55,129 (54.6%)	127,441 (43.5%)
	40–49	25,120 (24.9%)	61,233 (21.0%)
2002/03	50–54	6,162 (6.1%)	17,071 (5.8%)
	55–59	2,224 (2.2%)	11,819 (4.0%)
	60 and over	765 (0.8%)	19,567 (6.7%)
Total 2002/03		**100,883**	**293,096**
	24 and under	14,663 (13.3%)	73,383 (22.2%)
	25–39	58,651 (53.3%)	135,385 (41.0%)
	40–49	25,831 (23.5%)	70,191 (21.3%)
2007/08	50–54	6,755 (6.1%)	18,891 (5.7%)
	55–59	2,923 (2.7%)	12,298 (3.7%)
	60 and over	1,224 (1.1%)	19,824 (6.0%)
Total 2007/08		**110,047**	**329,972**

Source: HESA Student record 1998/99 to 2007/08

Table 8

Top five subjects studied by full-time students aged 40–49, 2007/08

Subject	000s
Subjects allied to medicine	4,260
Education	3,665
Social studies	2,265
Business and administration studies	1,200
Creative arts and design	1,095

Source: HESA Student record 2007/08

Table 9

Top five subjects studied by part-time students aged 40–49, 2007/08

Subject	000s
Subjects allied to medicine	24,055
Education	19,010
Combined	13,290
Business and administrative studies	10,070
Social studies	7,665

Source: HESA Student record 2007/08

Table 10

Top five subjects studied by full-time students aged 50-plus, 2007/08

Subject	000s
Education	680
Subjects allied to medicine	655
Creative arts and design	630
Social studies	385
Historical and philosophical studies	305

Source: HESA Student record 2007/08

Table 11

Top five subjects studied by part-time students aged 50-plus, 2007/08

Subject	000s
Combined	17,315
Education	8,765
Languages	8,055
Subjects allied to medicine	7,695
Historical and philosophical studies	5,985

Source: HESA Student record 2007/08

7.7 The Annual Population Survey provides data on modes of study and the findings are set out in tables 12 and 13, taking five-year age bands from 20 up to age 69. The tables demonstrate the switch from full- to part-time study moving from younger to older age groups, which is especially marked in the case of women. Of those aged 50–54, for example, on a course of some kind or waiting to start one, 54 per cent of women were studying part-time at university or college, as compared with 39 per cent of men. Conversely, men were more likely to be registered for full-time study: 15 per cent of those 50–54 as compared with 9 per cent of women. Distance learning (through the Open College, Open University or another correspondence course) also becomes noticeably more important for older age groups: among men aged 50–54, 21 per cent listed this as a mode of study, compared with 13 per cent of women; the comparable figures for the 60–64 and 65–69 groups (women in brackets) are: 24 per cent (15 per cent); 16 per cent (14 per cent).

Table 12

Type of course attended (male), 2008

	Age									
	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69
Full time university, college including 6th form	76.9%	45.7%	28.2%	20.9%	17.2%	15.9%	15.1%	9.8%	9.6%	3.5%
Nursing or similar medical course	0.5%	1.1%	1.4%	1.4%	2.2%	1.1%	0.7%			
Part-time university/college	14.8%	28.0%	36.3%	37.3%	38.1%	38.5%	39.1%	41.3%	41.1%	58.5%
Open College	0.8%	2.1%	2.4%	2.7%	1.8%	1.5%	4.9%	5.0%	2.9%	4.0%
Open University	1.1%	3.4%	5.3%	7.0%	8.7%	7.7%	7.1%	9.0%	15.0%	8.6%
Other correspondence course	1.2%	6.7%	6.1%	10.8%	8.2%	8.2%	9.0%	7.6%	6.1%	3.0%
Any other self/open learning	3.5%	12.6%	19.3%	19.6%	23.8%	26.9%	23.6%	27.2%	25.2%	22.4%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Percentages may not add up due to rounding

Source: Annual Population Survey (2008)

Table 13

Type of course attended (female), 2008

	Age									
	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69
Full time university, college including 6th form	74.1%	40.2%	27.0%	23.8%	18.8%	13.2%	9.1%	8.0%	5.8%	9.3%
Nursing or similar medical course	2.2%	2.6%	3.1%	2.8%	3.1%	4.4%	2.9%	1.5%	0.3%	
Part-time university/college	14.0%	33.8%	40.8%	40.6%	47.1%	45.2%	53.7%	51.7%	59.1%	57.1%
Open College	1.1%	1.1%	1.7%	1.8%	1.4%	2.2%	2.2%	3.5%	3.2%	5.4%
Open University	1.8%	4.2%	4.9%	7.2%	6.7%	5.7%	5.1%	3.6%	7.7%	3.8%
Other correspondence course	1.4%	5.0%	9.1%	6.4%	5.5%	6.6%	5.8%	5.5%	4.1%	5.2%
Any other self/open learning	4.4%	12.7%	12.8%	17.1%	17.0%	22.1%	20.6%	25.6%	19.1%	18.7%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Percentages may not add up due to rounding

Source: Annual Population Survey (2008)

7.8   The importance of part-time and distance learning is confirmed in studies of institutions specialising in part-time and distance learning provision. For the Open University and Birkbeck College, around 20 per cent of their graduating students are aged 51 or above.[66] Research by Feinstein and colleagues[37] found the average age of graduates at Birkbeck to be 43, and 44 at the Open University. Open University data on the type of modules for which students aged 50-plus register show a broad spread of interests across the arts, social sciences and natural sciences. However, 50-plus students tend to favour short courses (10/15 credits), notably in the arts, languages (summer schools in particular) and the natural sciences (including maths and computing).

7.9 Another way of exploring interest from older students in university is through examining the age profile of 'access to higher education' courses. First established in the late 1970s, such courses remain an important route into higher education for mature entrants. One in four first-time mature entrants to full-time degree programmes still enters via an access course. The report[67] published by the Higher Education Funding Council for England which covers this group used data based on English-domiciled students with no recent higher education experience who registered for an access course at further education colleges and higher education institutions in England in 1998–99. This cohort contained 19,196 students on standard length access courses and 2,520 on longer courses. The 'typical' access student was found to be in his or her 20s or early 30s. Around 4 per cent of standard access students were aged 50-plus with a similar figure for extended access students (chart 6).

Chart 6
Access students by age
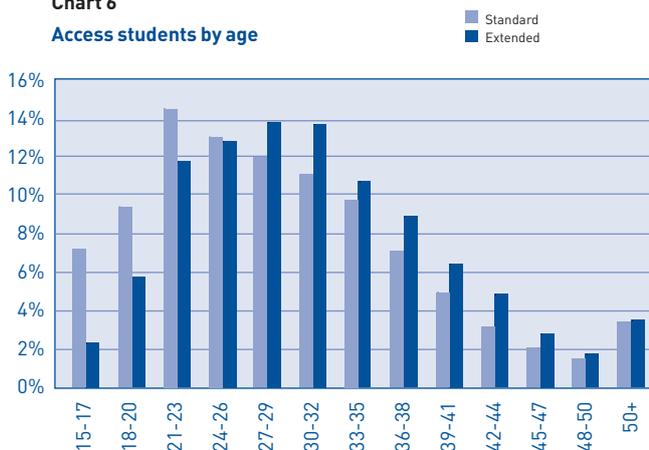
Source: HEFC (2006) *Pathways to higher education, 2006/16*
Base n=21,716 (Standard: 19,196; Extended: 2,520)

7.10 The above findings are reflected in the proportion of 50-plus adults studying for a qualification, especially one at level 4 or above. Table 14 confirms that studying at sub-degree or higher degree level (or above) is much less likely compared to studying for 'other qualifications'. Again, there is a marked contrast here with those aged 40–49. Reinforcing this picture, Pollard and colleagues[68] examined the perception of working adults towards going to university. Just 16 per cent of 45–55 year olds were 'definitely/probably considering/already considering' higher education and 84 per cent were 'not interested/unlikely to consider'. Equivalent figures for those aged 31–44 were 28 per cent and 72 per cent.

Table 14

People working towards a qualification[1] by age, 2008[2]

United Kingdom						
	Degree or equivalent and higher	Higher education[3]	GCE A level or equivalent	GCSE or equivalent	Other qualifications	All studying
16–19	15	22	74	67	13	35
20–24	45	20	9	6	12	21
25–29	13	12	3	5	17	11
30–39	13	22	5	9	25	14
40–49	10	17	6	9	21	12
50–59/64	4	7	2	5	12	6
All aged 16–59/64[4]	**2.0**	**0.5**	**1.4**	**0.9**	**1.7**	**6.5**
(=100%) (millions)						

1 For those working towards more than one qualification, the higher is recorded. See Appendix, Part 3: Qualifications. Excludes those who did not answer and those who did not state the qualification they were working towards

2 Data are at Q2 (April–June) and are not seasonally adjusted. See Appendix, Part 4: Labour Force Survey

3 Below degree level but including National Vocational Qualification (NVQ) level 4

4 Men aged 16 to 64 and women aged 16 to 59

Source: *Social Trends 39*. Office for National Statistics, 2009

7.11 The marginal role of higher education institutions in older learners' lives is also reflected in answers to questions about where learners found out about their main learning activity and the location of their training programme. Information in tables 15 and 16 shows that 1.9 per cent of those aged 55–64 found out about their main learning activity from a university, and 3.7 per cent aged 55–64 had their training scheme or course provided at a university.

Table 15

How current/recent learners found out about their main learning activity

	All current/ recent learners %	Age split at 45 17–44 %	Age split at 45 45+ %	Age split at 55 17–54 %	Age split at 55 55+ %	10-year age bands 45–54 %	10-year age bands 55–64 %	10-year age bands 65–74 %	10-year age bands 75+ %
Work: my employer/training officer/ personnel officer	18.6	18.5	18.9	20.5	10.8	27.3	14.9	5.1	–
Workmates/colleagues	15.8	15.2	16.8	16.8	11.6	22.2	15.2	7.5	–
College	13.3	16.5	7.9	14.5	8.1	7.7	8.3	9.3	*4.1*
Friends/family	11.4	10.6	12.7	10.5	15.2	10.1	10.0	24.8	*23.1*
University	5.2	7.1	2.0	6.1	1.2	2.9	1.9	–	–
Newspaper/magazine	5.1	3.2	8.4	3.9	10.3	6.4	9.4	13.2	*8.3*
School	4.6	6.3	1.8	5.3	1.8	1.8	1.3	1.7	4.9
Internet	3.8	4.6	2.4	4.1	2.4	2.3	3.8	–	–
Adult education centre	3.5	3.0	4.4	3.1	5.3	3.4	5.9	4.3	*4.2*
Printed publicity delivered to home	2.6	2.1	3.4	2.2	4.3	2.5	3.8	*5.8*	4.1
Public library	2.5	1.7	3.8	1.6	6.1	1.5	6.1	4.2	*10.3*

Base: all current/recent learners

Figures in italics, ie the column for adults aged 75+, should be treated with caution due to the very small sample size

Source: Aldridge and Tuckett (2007)

Table 16
Main location of learning

	All current/ recent learners %	Age split at 45		Age split at 55		10-year age bands			
		17–44 %	45+ %	17–54 %	55+ %	45–54 %	55–64 %	65–74 %	75+ %
Further education college/ tertiary/6th form college	20.9	24.2	15.5	22.0	16.5	14.5	15.6	17.5	19.1
Where I work	18.3	17.9	18.8	19.7	12.0	25.8	16.2	4.7	4.3
University	14.1	18.4	7.0	16.6	3.7	10.4	3.7	2.6	6.1
At home	12.1	9.5	16.3	9.9	21.1	11.3	21.6	19.5	22.6
Adult education centre/ evening institute/ WEA	7.2	5.0	10.9	6.2	11.3	10.4	10.6	15.9	5.2
Employer's training centre	4.6	5.0	4.0	5.0	2.9	5.1	4.2	0.7	–
Weighted base	2,101	1,313	788	1,699	402	386	256	102	43

Base: all current/recent learners

Figures in italics, ie the column for adults aged 75+, should be treated with caution due to the very small sample size

Source: Aldridge and Tuckett (2007)

7.12 The annual survey by the National Institute of Adult Continuing Education provides a more general overview of learning and trends in participation in learning, using a broad definition covering publicly-funded as well as self-organised learning (see section 2). Table 17, with figures for selected years from 1996 to 2009, gives a picture of declining participation since 2005 among older age groups, reflecting the substantial fall in the number of adult learners participating in courses funded by the Learning and Skills Council. Over the four years 2002/03–2006/07, the numbers of 60-plus learners enrolled on LSC-funded further education provision fell from 402,000 to 164,000.[69] This reflects the shift in provision from part-time to full-time programmes, and from non-qualification to qualification-bearing courses. McNair[70] makes the point that older people, who were overwhelmingly concentrated in the former type of courses, saw fees rise and courses closed to make way for new priority groups.

Table 17

Current or recent participation in learning by age – 1996, 1999, 2002, 2005, 2007, 2008 and 2009

	1996 %		1999 %		2002 %		2005 %		2007 %		2008 %		2009 %	
Total sample	40	(5)	40	(4)	42	(4)	42	(5)	41	(5)	38	(5)	39	(5)
17–19	86	(42)	81	(37)	78	(34)	75	(46)	82	(53)	79	(52)	78	(48)
20–24	65	(15)	70	(25)	72	(27)	63	(29)	64	(22)	60	(22)	61	(24)
25–34	48	(2)	50	(2)	51	(2)	52	(4)	50	(4)	43	(2)	45	(3)
35–44	43	(1)	47	(1)	47	(2)	49	(1)	44	(1)	46	(1)	42	(1)
45–54	36	(1)	41	(*)	44	(1)	47	(*)	45	(*)	40	(*)	42	(–)
55–64	25	(*)	29	(-)	30	(-)	32	(-)	31	(-)	29	(*)	31	(*)
65–74	19	(2)	16	(-)	20	(-)	17	(-)	21	(-)	19	(*)	18	(-)
75+	15	(–)	9	(-)	10	(-)	10	(-)	15	(-)	11	(-)	13	(-)
Weighted base	4,755		5,205		5,885		5,053		4,916		4,932		4,917	

Base: all respondents

Figures in parentheses show the proportion of each age group who are in full-time education
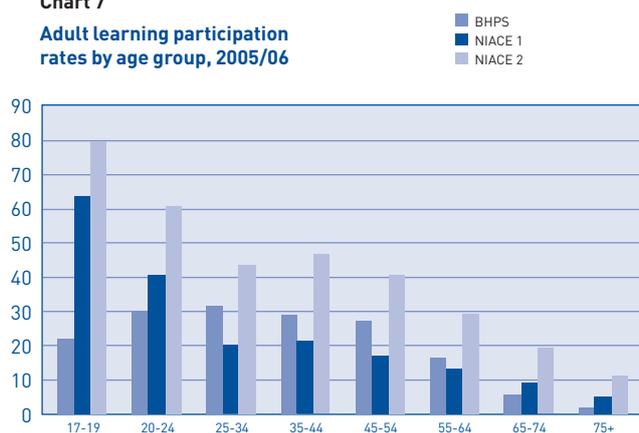
Source: NIACE Survey on Adult Participation in Learning, Aldridge and Tuckett (2009)

7.13 Chart 7 explores participation in learning by comparing responses in relation to different definitions of learning, drawing on the British Household Panel Survey (2005/06) and the 2008 NIACE survey. The key finding is that on both surveys on all three indicators, participation rates decrease with age, with the sharpest fall occurring after the age of 55.

7.14 As this research suggests, most older adults' learning takes place on part-time courses. The British Household Panel Survey asks respondents whether they have taken any part-time course in the six months prior to the interview. Chart 8 shows those who said 'Yes' for the year 2005/06, identifying their occupational status – that is, whether they were working full-time, working part-time or retired.

Chart 7

**Adult learning participation rates by age group, 2005/06**

Source: BHPS, Wave O (2005/2006) (participation in **training schemes or courses**). NIACE, 2008 survey on adult participation in learning (see methodology section for definitions)

Read: 22% of respondents aged 17–19 took part in **training schemes or courses** since 1 September, 2005, ie within the past six months (BHPS); 63% of respondents aged 17–19 were **currently doing some learning activity** (NIACE1) and 79% of respondents aged 17–19 **were currently doing some learning activity** or had done some learning activity in the **last three years** (NIACE 2)

Chart 8

Proportion of the British population who took part in training schemes or courses (part-time) within the last six months by occupational status, 2005/06
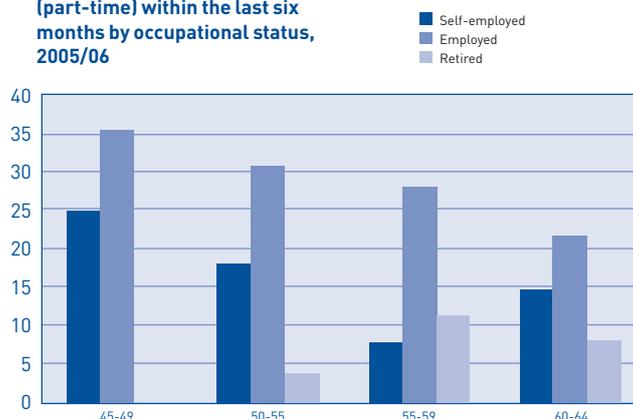

Source: BHPS, Wave O, 2005/2006; author's analysis

7.15 Analysis of the BHPS suggests a number of trends. First, just over one in five people aged 46–64 took a part-time course in the six months prior to interview. Secondly, part-time education is strongly associated with participation in the labour force. Thirdly, older employees, as well as older self-employed people, are less likely to undertake a part-time course than young employees or self-employed people, with the exception of self-employed people aged 60–64. A higher proportion of self-employed people in the age group 60-64 took part in training schemes or courses within the last six months than self-employed people in the age group 55-59 (chart 8). The reasons for this finding are not clear; it could be due to changing needs, in particular among individuals who have recently become self-employed as an 'alternative' to full retirement. Demand for courses to support older workers entering 'bridging' forms of employment (see section 5) could be an area for new types of continuing professional development courses provided by the higher education sector.

7.16 Gender, age and occupational status are important variables influencing participation in formal education and training (charts 9, 10 and 11). This point is illustrated through analysis of Wave 1 data from the English Longitudinal Study of Ageing (ELSA). Gender differences are not so marked, although women still appear more likely to have participated in formal education or training than men. These differences become less significant after the age of 60.

7.17 Social class is also strongly linked to participation of older students within higher education. Jamieson's 2007 survey of students (aged 61 and above) from Birkbeck and the Open University confirmed that most were from senior professional or managerial occupations. Interestingly, the Birkbeck group was highly qualified on entry, with around one in five already having a postgraduate qualification. The association between social class and continuing education is highlighted in the analysis by Jenkins[43] of data from ELSA (Wave 1). This showed that nearly one third of those aged 50-plus with degrees had participated in music, arts or evening classes in the 12 months preceding the interview, with about the same proportion having undertaken a formal education or training course. In comparison, for those with no qualification, fewer than 5 per cent had attended a formal training course or been to an evening class in the previous 12 months.

Chart 9

Percentage of people aged 50-plus who have attended a formal education or training course during the last 12 months by gender and socio-economic group
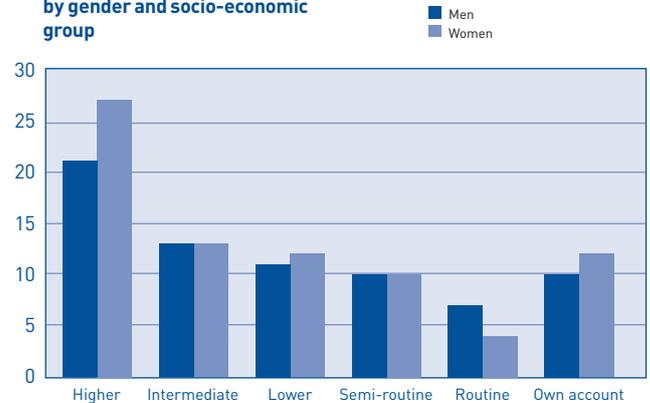
Source: ELSA, Wave 1

Chart 10

Percentage of people aged 50-plus who have attended a formal education or training course during the last 12 months by gender and age
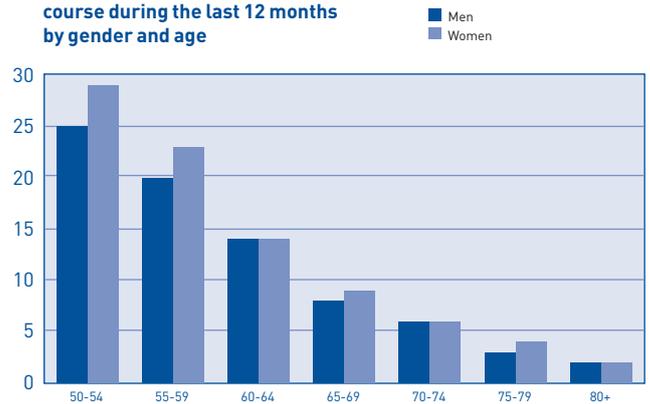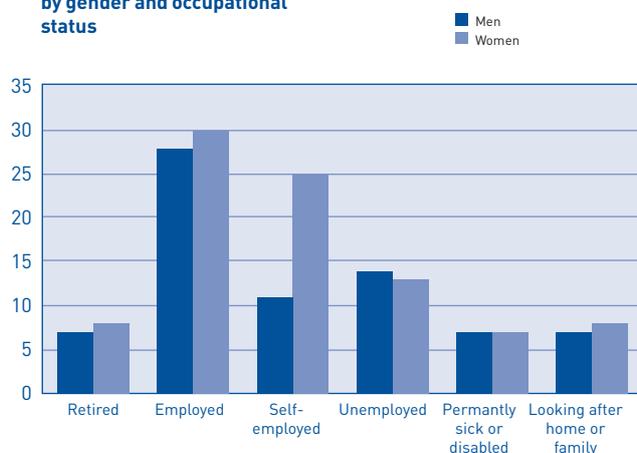

Source: ELSA, Wave 1

7.18 Chart 11 confirms that in general, after the age of 50, it is people who are still in the labour market who take part in education and training. Rates are the highest among employees, followed by the self-employed and those registered as unemployed. The 25 per cent of self-employed women attending a formal education or training course is of particular interest, providing evidence for changing employment patterns among this group. The importance of attachment to work and engagement with learning was further highlighted in the 2009 NIACE survey. This showed a decline from 20 per cent in 1996 to just 16 per cent in 2009 in the proportion of those retired people who had currently or recently participated in learning. Thus despite policies that promote learning in later life and evidence of its benefits, there are signs of declining take-up among older people, across a broad range of provision.

Chart 11

Percentage of people aged 50- plus who have attended a formal education or training course during the last 12 months by gender and occupational status

Source: ELSA, Wave 1

7.19 Section 7 has set out the still limited role of older learners within the educational system – and higher education in particular. The sharp decline in educational involvement after age 50 matches the picture in section 6 about training provided by employers. The next section considers the barriers facing older people who want more formal education.

8.1 Section 8 examines some of the factors that might restrict older people's participation within learning environments. First, it is worth summarising the case for providing learning opportunities for older people. Walker (cited in Anderson[19], page 10) highlights the main arguments as:

- compensation: to make good past disadvantage and lack of opportunity, whether of an individual or social nature

- equal opportunities: to deal with current disadvantage, combat exclusion and provide a 'level playing field' for all citizens, regardless of past or future contribution to society

- intergenerational equity or solidarity: to reinforce or renegotiate the social contract between generations that people both contribute to and benefit from over the course of their lives, in a mutually supportive way.

8.2 There are important variations in older people's abilities and inclinations to take up learning. These reflect factors such as cohort differences (for example, between 'early' and 'late' baby boomers), past educational disadvantage, financial and social circumstances and, not least for some, health and disability.[71] All of these influence how much people are attracted to potential learning activities. The 2009 NIACE survey shows (table 18) how people's intentions to participate in learning decline as they get older. There are nevertheless substantial proportions still expressing positive views: 21 per cent of those aged 45–54 considering it 'very likely' that they will take up learning and a further 21 per cent 'fairly likely'. These proportions will probably increase as younger and more highly educated age groups reach a similar age.

8.3 There is evidence of three major barriers accounting for the under-representation of older people in lifelong learning: attitudes, personal circumstances and institutional barriers. Slowey[35] summarises them as follows:

- Attitudinal barriers reflect perceptions – by older learners as well as providers – about their lack of ability, motivation and interest in gaining new knowledge.

- Situational barriers highlight personal factors beyond the control of the learner. These may include health and caring responsibilities, as well as shortage of time and money.

- Institutional barriers suggest organisational practices that discourage people from participation in learning. The educational environment may be off-putting and people may not regard the subjects offered as relevant to them. Institutions may lack confidence or expertise with older learners, or find it difficult to teach intergenerational groups.

8.4 Research by NIACE shows the impact of some of these barriers. Concern about 'being too old' to learn comes out clearly in table 19 (affecting one in four of those aged 55 and over) and is a bigger barrier than worries about money, health or disability. Lack of interest, mentioned by around one in three of those aged 55 and over, is the other main barrier.

Table 18

Future intentions to take up learning 2009, by age

	Total %	17–19 %	20–24 %	25–34 %	35–44 %	45–54 %	55–64 %	65–74 %	75+ %
Very likely	19	35	29	26	26	21	11	5	4
Fairly likely	19	27	30	26	24	21	13	7	3
Total likely	**38**	**62**	**59**	**52**	**50**	**42**	**24**	**12**	**7**
Fairly unlikely	12	8	12	13	14	14	15	9	6
Very unlikely	47	25	24	30	33	41	59	78	85
Total unlikely	**59**	**33**	**36**	**43**	**47**	**55**	**74**	**87**	**91**
Don't know	3	5	6	5	4	3	2	1	1
Weighted base	4,680	113	311	817	901	789	781	506	464

Base: all respondents who have finished full-time education

Source: Aldridge and Tuckett (2009)

Table 19

Barriers to learning

	All current/ recent learners %	Age split at 45		Age split at 55		10-year age bands			
		17–44 %	45+ %	17–54 %	55+ %	45–54 %	55–64 %	65–74 %	75+ %
Not interested/don't want to	26.1	16.3	32.8	18.1	36.7	22.4	32.7	39.2	40.0
Work/other time pressures	16.4	22.4	12.3	22.9	7.8	24.1	12.0	5.8	3.6
I feel I am too old	11.9	1.2	19.2	2.6	24.2	6.1	13.6	25.8	39.0
Childcare/caring for others	6.7	13.5	2.1	10.8	1.3	4.2	1.8	1.3	0.5
I feel no need to learn anymore	6.5	4.8	7.6	5.1	8.4	5.7	7.4	8.8	9.3
Cost/money/can't afford it	5.9	10.3	2.9	9.0	1..9	5.5	2.5	2.1	0.7
I am too ill/too disabled	4.9	1.6	7.1	2.8	7.6	5.9	8.4	6.0	8.4
Weighted base	3,895	1,584	2,312	2,223	1,673	639	686	561	426

Base: all of those who have finished full-time education and are not 'very likely' to take up learning in the next three years

Source: Aldridge and Tuckett (2007)

8.5 The study by Pollard and colleagues[68] confirmed the influence of age on attitudes and intentions towards higher education. Looking at reasons (among people aged 22–55 with no level 4 qualification) for not considering higher education in the future, the main factor (mentioned by more than one in three) among those 45–55 was a perception that they were too old to learn; 24 per cent felt that they did not 'need' higher education and 23 per cent were 'not interested'. Only one in ten of the 31–44 age group felt too old to learn.

8.6 Analysis by Chilvers[72] of the 2005 National Adult Learning Survey of adults aged 19–69 living in England and Wales highlighted two relevant groups. The first was labelled 'older into other things' and represented 11.1 per cent of the population. This was a group mostly over 45, mostly male, with less than average qualifications, 'not interesting in learning themselves and very happy with their lives'. The second group – 10.6 per cent of the population – was dubbed 'too late to learn'. This group was mostly 45-plus, mostly female: its members had few objective barriers to learning but doubted the value of undertaking it.

8.7 We need to know more about how institutional barriers to learning affect older learners. There is some evidence[68] that adults knew little or nothing about entry requirements nor what higher education might cost them. A Help the Aged survey[32] reported that 45 per cent of older people lacked confidence in using 'new technology' to learn and that only 27 per cent would feel comfortable learning online.

8.8 Lack of familiarity with IT will soon be less of a barrier. Already, according to the 2007 British Social Attitudes Survey, more than one person in five aged 55–64 uses a PC and/or the internet every day and 42 per cent use a PC and/or the internet several times a week. When asked about their current or recent learning, 41 per cent of those 55 and over mentioned computer skills courses[18]. Nonetheless, only around 50 per cent of those aged 52-plus own a personal computer, and only 20 per cent of those aged 75 and over.[44] When higher education institutions are developing programmes aimed at older learners they need to bear these figures in mind.

8.9 We know that older learners' motivations for learning are different from those of other age groups. Personal interest in the subject and the enjoyment of learning are more important than work-related benefits, although this factor is mentioned by one in four of those aged 55–64 (see table 20). Pollard and colleagues[68] also found that people aged 45–55 inclined towards academic rather than vocational subjects; this linked with 'personal development' as the main motivation for study.

8.10 Jamieson's[66] survey of Birkbeck and Open University students also ranked personal development and 'interest in subject' as an important reason for wanting to study. On the other hand, Jamieson emphasises the heterogeneity of the students, who were using the educational system to make themselves more attractive to employers or to help them change their type of work. This was especially the case with those in their 50s in contrast to those in their 60s.

Dench and Regan[38] concluded from their study of people aged 50–71 (based on a sample drawn from the NALS) that the most important reasons for learning were intellectual, for example, wanting to keep the brain active and enjoying the challenge of learning new things. Instrumental reasons, such as having to do some learning for work, appeared much less important. A survey by the American Association of Retired Persons[73] concluded that:

'Adults 50 and over are interested in learning most about things that enrich their lives, that help them stay healthy, and that bring them more enjoyment. Roughly half of adults are interested in learning about favourite hobbies or pastimes, new advanced skills, how to get more enjoyment out of life, and/or having a healthy diet and nutrition' (page 4).

Table 20
Motivation for learning

	45–54 %	55–64 %	65–74 %
Rising citation of motivation to learn			
I am interested in the subject/personal interest	30.6	42.4	51.1
I enjoy learning/ it gives me pleasure	19.8	29.8	53.4
To improve my self-confidence	11.6	13.3	13.8
To meet people	5.6	7.6	15.5
Falling citation of motivation to learn			
To help in my current job	38.6	25.1	8.0
To develop myself as a person	29.0	27.6	19.6
To get a recognised qualification	20.7	9.1	4.6
To make my work more satisfying	16.8	12.8	5.5

Base: all current/recent learners
Source: Aldridge and Tuckett (2007)

8.11 Despite the various barriers facing older students, the evidence suggests that many groups are still motivated to learn, albeit in settings different to that provided by higher education. In the next section we consider the importance of non-formal education in providing an outlet for learning activities among older people.

9.1 The growing numbers of older people in the population pose a major challenge for the educational system and especially for higher education. One American commentator[74] suggests that:

> 'In both Europe and America, older adult education has been entirely neglected by policymakers, administrators, and the official voices concerned with the education and welfare of the older population. In short, later-life learning, even as it has grown in scale, has remained marginal, even invisible from the standpoint of 'official' systems of understanding and control' (page 29).

9.2 Slowey[35] echoes this, commenting that '...few EU policies on lifelong learning address the role of the post-work population'. In the UK, older learners remain a neglected group within the training and educational system. Changes to LSC-funded provision, combined with the withdrawal of funding for equivalent or lower level qualifications (ELQs) (see below), will probably further limit the participation of older people in education.

9.3 On the other hand, it is important to acknowledge, firstly, initiatives that are developing within and beyond the formal educational system. Secondly, there are issues that might limit the participation of older learners within education. Thirdly, there is a need to explore new initiatives that might attract older learners to higher education.

9.4 Hirsch[46] points out that lifelong learning remains 'heavily weighted towards younger age groups'. The education system, however, is responding in various ways to the needs of older learners. In the UK, several universities have developed centres or institutes of lifelong learning (see Appendix 1). The University of Strathclyde established the Senior Studies Institute (SSI) in 1991, part of the university's Centre for Lifelong Learning. The SSI attracts around 3,000 students each year, providing day classes, seminars and access to university courses. Lancaster University has organised a University of Later Life, grouping together work that invites older people to explore the campus, attend lectures and seminars, and register for part-time courses. The Institute of Education at the University of London has embarked on a programme of research examining how older learners (10 per cent of its students) engage with their programmes. It has also started a new Master's level module – Issues in Educating and Training Mature Adults (50+) – with the aim of engaging 'teachers, managers and others in discussion and reflection about the educational needs, aspirations and strengths in the learning of mature adults 50+'.

9.5 Most institutes of lifelong learning (or their equivalent), however, reflect a longstanding university tradition of adult and continuing education, promoting a wide range of courses to the general public. They do not reflect, as yet, the changing needs and aspirations of the cohort of people entering the 'third age'.

9.6 In the United States, educational programmes targeting older adults began to proliferate in the 1960s.[74] Colleges and universities offered tuition-free courses; community colleges partnered with community centres serving older people to deliver courses onsite; and institutes for learning in retirement were created by a number of higher education institutions (around 800 institutes are housed at colleges and universities across the USA[20]). Much of the work in retirement education in the USA links to a longstanding interest in pre-retirement education[75] associated with the establishment of retirement communities. Many of the latter, especially where serving a professional middle-class community, incorporated educational activities into their development.

9.7 One example within higher education is Eckert College in Florida which erected retirement housing on campus to encourage senior citizens to take courses and interact with undergraduate students. Achenbaum[76] highlights another instance, the partnership between the University of North Carolina at Asheville and the learner-driven North Carolina Center for Creative Retirement. Participants take classes that they design, conduct programmes combining younger and older age groups to develop leadership skills, and analyse problems in the community and at state level.

9.8 Despite the range of activities for older learners in the United States, the American Council on Education[20], in its report *Older adults and higher education*, noted that despite some evolution of programmes to meet changing needs:

> '...they have yet to catch up with the burgeoning demand for new learning options, especially programs for career transitions. Moreover, structural barriers related to outreach, programming, and funding continue to stymie efforts to make lifelong learning for older adults more accessible' (page 22).

And Manheimer[77] makes the point that:

> '...currently, organizational leadership in older adult education is fragmented and decentralized in the US; there is no organized group lobbying Congress or state governments for increased funding to educational programs primarily serving older adults'.

9.9 In Europe, Spain now has most of its public universities and many private ones offering educational programmes aimed at older people – most of these resembling those organised by institutes of lifelong learning in the UK.[78] The University of Alicante's Permanent University (UPUA) is a scientific, cultural and social development programme aiming 'to promote science and culture, as well as intergenerational relationships, in order to improve older adults' quality of life and encourage them to participate in community activities'. The UPUA collaborates with government education departments and local government, as well as banks and financial institutions. The Permanent University has a target population of individuals aged 50+ who are resident in the Valencia area. It was established in 1999 and has approximately 900 students scattered among its four university centres.

9.10 In Germany, the Centre for General Scientific Education at the University of Ulm has established a programme of multidisciplinary education across all age groups but with a specific focus on the 'third age'. The interests of older people influence the development of programmes and the aim is to improve autonomy through the process of learning by undertaking research. Cologne University established a group, part of the university's adult education programme, that brought older people into contact with university-based research/teaching staff to explore issues concerned with ageing. Students register for a variety of courses covering the full range of humanities, social and natural sciences. Working groups have also been established to explore topics with themes related to ageing.

9.11 Despite the merits of activities such as those described above, some critical questions need to be asked about their development. First, few countries have considered the role of education in supporting ageing populations. Most initiatives remain uncoordinated and are not based on any systematic assessment of the 50-plus market.[79] Secondly, formal education remains a relatively junior partner compared to informal learning, defined as 'structured or unstructured part-time, non-vocational learning which does not lead to qualifications'.[80] The importance of informal learning was identified in a consultation by the then Department for Innovation, Universities and Skills in 2008[80] and in the subsequent White Paper *The learning revolution*.[10] The remainder of this section highlights the range of older learners' informal learning.

9.12 The University of the Third Age (U3A) is probably the best known voluntary organisation in this field, operating entirely outside the formal education sector. It began in France in 1972, when new legislation required universities to provide more community education. In 1973, a gerontology course was provided by Toulouse University for local retired people and this led to the formation of what was to be the first U3A. This organisation was open to anyone over retirement age; no qualifications or examinations were required and fees were kept to a minimum. The idea spread rapidly throughout France and then to Belgium, Switzerland, Poland, Italy, Spain and across the Atlantic to Quebec and California.

9.13 In the UK, the concept of the U3A underwent a substantial change when it reached Cambridge in 1981, with the establishment of the Forum for the Rights of Elderly People to Education. Members became teachers as well as learners, fostering a 'self-help' ideal based on the knowledge that retired people are experts in many different fields. In the early 1990s the UK had around 150 active U3A groups and 20,000 learners and now has an estimated 670 groups with around 190,000 learners (2008 figures).[81]

9.14 Another important area for informal education from the late 1970s onwards has been the development of 'intergenerational learning': educational programmes which link older with younger learners. Newman and Hatton-Yeo[82] cite the example of the NUGRAN programme at the University of Valencia which creates learning experiences that involve older adults and younger students in intergenerational learning programmes that aim to promote greater contact, trust and more positive attitudes between the generations. The programme began with 71 students in 1999 and currently involves 1,000 students. Older adults enrol as university students and can share instruction, research, facilities and resources with younger students. It provides a unique opportunity to promote interaction and communication among the younger and older students. Students at NUGRAN are required to earn 90 credits in a three-year period and take courses in a variety of disciplines.

9.15 The University of Pittsburgh's intergenerational engineering learning programme is a further example and involves retired engineers mentoring students in day-to-day engineering practice. The mentors, retired between four and ten years, relearn basic engineering as they introduce the concepts to first-year engineering students. Their hands-on approach and practical understanding of the basic engineering principles help realise two goals of this project: to increase the retention rate of female students and African-American students, and to help foreign students adapt to United States culture as they pursue their engineering careers.

9.16 Informal provision has, then, been a major force in developing programmes for older learners. One might argue that its success is in part because the formal sector has either remained marginal or indeed has substantially withdrawn from activity with older learners: the number of people aged over 60 in further education declined by 38 per cent between 2005/06 and 2006/07. There has also been a long-term decline in those participating in adult and community learning, a decline of 9 per cent over the same period.[69] In higher education, the withdrawal of institutional funding for equivalent or lower level qualifications (ELQs) is likely to have a 'more significant impact on older learners'.[83] In any event, most older students register at university part-time, with the majority ineligible for government-funded financial support.

9.17 Non-formal, self-help and voluntary activities will always be a major part of learning for older people. Given pressures on formal provision, their presence may reinforce existing inequalities in learning. The membership of U3A, for example, is 'overwhelmingly middle-class' (Summers cited in Anderson[19], page 22) largely benefiting those with a history of involvement in adult education. Even where higher education institutions succeed in drawing in older learners, the evidence suggests that they tend to attract older learners who are already highly qualified.[66,84] This is not to challenge the importance of existing activities – formal and non-formal; it does suggest however that new ideas are required to draw a wider spread of social groups into higher education. We explore those ideas in the final section of this report.

10
Responding to active ageing: issues for universities

10.1 The ageing of the population offers higher education institutions a serious challenge. The 21st century will require societies to find novel ways of managing ageing populations, whether through encouraging new intergenerational ties, combining different forms of formal and informal support, or facilitating a more even spread of work across the life course. In all these, education – and higher education in particular – could play a key role in helping institutions adapt, whether through encouraging new types of adult learning through all phases of the life course or training professionals who work with older people.

10.2 Thus far, older learners remain largely outside formal education. As we have highlighted in this report, there are nonetheless areas of expansion affecting older learners.

■ First-year part-time students aged 40 and over (undergraduate and postgraduate taught) increased by 58 per cent over the period 1998/99 to 2007/08: from 92,000 to 158,000.

■ Among those aged 40–49, 27 per cent are working towards a qualification at level 4 or above.

■ Despite lack of funding for part-time students and pressures associated with ELQ, some universities are continuing to find new ways to attract older learners.

■ Informal adult learning is flourishing – especially among those aged 50 and over. Building upon and supporting this growth of interest could be a crucial future activity for universities.

10.3 The number of older learners moving into higher education will almost certainly increase, given broader demographic and social changes. Key challenges here include:

■ the rise in the proportion of older people in the population (from 16 per cent in 1971 to 23 per cent of the UK population in 2031 over state pension age)

■ the entry into retirement of the baby boom generation, a group with higher levels of education and wider aspirations

■ pressures to extend working life for economic and financial as well as social reasons

■ changes around mid-life and the evolution of the so-called 'third age' following retirement and care-giving.

10.4 The above factors are transforming the landscape both for higher education and for older people. In the 1960s, despite the post-war evolution of youth as a social and economic category, higher education was focused on an elite category of students (around 6 per cent of the age group). Youth, in this context, had been constructed 'outside' rather than through the higher education system.

10.5 Most people in the current 50-plus age group are 'outside' the university system, with 'later life' or the 'third age' developing as a category insulated from higher education. Many of the baby boomers will, however, have 'passed through' higher education and/or will have engaged with universities through supporting their children's university education.

10.6 In the early 1960s, the Robbins Report[85] set out the case for a greatly expanded higher education system. More than three decades on, responding to a new group hitherto excluded from higher education poses a fresh challenge, yet current policy has not taken account of the reality that older people will be living longer and more actively. Investment now in education – and higher education in particular – is likely to have major benefits for individuals and for society as it will help older people remain economically and socially engaged (see paragraph 4.11).

10.7 Higher education can help in four main ways by:

■ playing a leading role in creating a new type of ageing for the 21st century, built around extended economic, family and citizenship roles

■ supporting people planning the probable two decades beyond their main work careers

■ unlocking mental capital and promoting wellbeing in later life

■ supporting a range of professional and voluntary groups working on behalf of older people.

10.8 Higher education institutions need a clear role that complements that of other educational institutions and works alongside the flourishing non-formal/self-help sector. They will need answers to questions such as:

■ Which are the older learners to target, given their diversity across the different birth cohorts represented?

■ What kind of activities are consistent with the distinctive mission of the university sector?

- What sources of funding for universities need to be secured to assist the expansion of work with older learners?

- How can the benefits of widening access to older learners be demonstrated?

10.9 The diversity of the 50-plus age group raises important issues for higher education institutions. 'Older learners', as an age and social category, contains a mixture of overlapping 'learning generations'. The range of priorities identified by McNair[86] (page 9) shows some of the different reasons behind people's desire to learn:

- maintaining employability

- developing qualifications that enable people's real skills and qualifications to be recognised and used to access appropriate work

- assisting more frequent and complex life transitions, including changing jobs and moving home

- supporting people to find meaning and purpose in post-employment life

- transferring skills, knowledge and experience between generations

- enabling people to maintain rewarding social and intellectual lives.

10.10 A key feature of McNair's list is the idea of 'transitions', especially in relation to movement between careers. Universities have a significant role, along with commercial and public organisations, in supporting career development programmes for employees from mid-life onwards. Policies of extending working life and the equalisation and raising of state pension ages highlight the need for innovative training and professional development projects that counter negative views about learning among the 50-plus age group, and the rapid decline in their participation in training and education.

10.11 A substantial proportion of the projected increase of one million adults aged 55–64 in the period 2011–2021 will return to education through undergraduate and postgraduate study (mostly part-time), continuing professional development and distance-learning, to develop an existing career or to switch forms of employment. Many will have substantial educational capital that they will want to develop further. Universities need to plan for this.

10.12 Transitions in middle life are as important as those for the over-60s. Universities will have to experiment with new ways of teaching older adults and will need to research the benefits resulting from their engagement with higher education, while continuing to meet older learners' demand for traditional academic courses. The latter deserve to be expanded as part of lifelong education.

10.13 Here are four pathways for higher education institutions:

- *Educational and personal development programmes*
These would build upon existing work in adult and continuing education, but would identify new types of courses and markets among a diverse and segmented post-50s market.

- *Employment-related programmes*
These might support the policy objective of extending working life, although the extent of employer-demand may be fragile in the context of high levels of unemployment. The development of courses supporting people moving from full-time paid employment to various forms of self-employment may, however, remain attractive.

- *Social inclusion programmes*
Substantial numbers of older people – in current as well as succeeding cohorts – remain educationally and socially disadvantaged. Higher education institutions, with partners such as local authorities, further education colleges and the major national charities, should focus on a 'widening participation' agenda that covers all age groups, not just the young and working adults.

- *Health and social care programmes orientated to professionals working with older people*
Programmes could vary from foundation degrees through to modules for continuing professional development, with the theme of maintaining 'active ageing' a key component.

10.14 Specific areas for development under the headings above might include:

- piloting new undergraduate curriculum areas relevant to a cadre of service professionals working on behalf of older people: the demand for undergraduate programmes in gerontology is untested in the UK but is a major area in the USA

- developing modules on 'active ageing' as a component in professional training for health and social care professionals: this could be a core or 'elective' on undergraduate programmes and/or part of continuing professional development

- outreach programmes targeted at older people, perhaps in partnership with further education colleges or as a dimension to new campus developments. Encouraging new types of courses focusing on 'healthy ageing' could be a major contribution to meeting the demographic challenge

- establishing centres/institutes for learning in retirement in geographical areas with substantial ageing populations; these could be co-funded ventures working with primary care trusts, further education colleges and local authorities. They could combine health promotion and education, building on the existing adult education tradition but developing programmes appropriate to older people with an extended period of initial and higher education

- developing educational programmes that support new forms of civic engagement in later life: areas such as 'environmental citizenship' and legal studies in 'human rights and community action' may be especially attractive to the baby boom generation

- linking up with regional development agencies to develop training programmes targeted at older workers co-funded by employers: this may be especially important given pressures to reduce training opportunities for workers in a period of economic recession

- targeting the 50-plus self-employed group, many of whom will be career/job changers with specific training requirements

- establishing partnerships with Age UK and other relevant voluntary organisations to develop educational programmes focused on tackling social exclusion in later life, exploring co-funding through government and other agencies. Developing innovative programmes that attract a wider range of social groups should be a key strategy for educational policy

- developing ageing as a niche area for academic development but combining teaching older adults with a research focus.

10.15 Universities will need to consider the best ways of organising courses aimed at older learners and for professionals working on their behalf. For older learners higher education institutions will need to:

- assess local, regional and national markets for 50-plus students, who are very different consumers of education compared to younger adult learners

- take account of regional and local demographics, which can vary greatly

- cater for older learners' preferred modes of study, such as part-time learning, short courses, distance-learning, summer schools.

10.16 For professionals working on behalf of older people, higher education institutions will need to:

- assess the continuing professional development requirements of the wide range of professional and voluntary groups involved with older people

- offer inter-professional education: drawing together health and social care workers could be a major focus for training programmes

- provide combinations of distance learning/web-based courses and residential courses/day release, which will probably be the preferred mode of study.

10.17 Three general points arising from the above are:

- the challenges associated with a stronger 'intergenerational' mix within traditional academic programmes

- the need to generate robust evidence about the benefits of learning in later life

- the need for a higher education strategy for older learners.

10.18 Currently 'mature students' are a minority on most full-time undergraduate programmes but make up a larger proportion of those on part-time courses. Increasing age diversity – especially on undergraduate courses – would itself raise difficult issues, such as managing a wider range of learning styles and contrasting attitudes to learning, and would require universities through their learning development units (or similar) to consider the implications of teaching across a wider spread of age groups. The American Council on Education[20] makes the point here that:

> 'Programming concerns can further obstruct older adults' access to higher education, including whether to develop separate programmes for older adults and how to make use of technology. At the heart of these issues is the range of motivations and needs of the older adult population – and the resulting flexibility that higher education institutions must have to deliver everything from career transition courses to leisure classes'. (page 22)

10.19 It is often claimed that learning in later life will improve physical and mental health, assist personal development, expand the range of social activities and improve employment options and we referred to these claims in section 4. The evidence, however, remains limited – a fact noted[38] in one of the few detailed UK studies of the impact of later life learning. Jenkins makes the point that 'Considering the literature on adult learning, mental health and wellbeing overall it is apparent that most studies have looked at people in their thirties and forties and there is much less work on the health benefits of adult learning among older people'.[43]

10.20 We need further research to assess how education might improve the quality of life in old age. If the benefits could be demonstrated, the case for major investment in attracting older students to higher education would be stronger. Demonstrating that education can improve the quality of late life will be valuable, not least for older people but also in highlighting the potential role of higher education.

10.21 We need comparisons between different groups of older learners, controlled (preferably longitudinal) studies of learners and non-learners, evidence on the impact of different types of courses, different learning environments and different approaches to teaching. A major study, possibly in partnership with the Economic and Social Research Council , should be considered.

10.22 At present, older learners fall into an unsatisfactory policy gap between conventional 'widening participation' and mainstream recruitment strategies. Most widening participation is not directed at older learners, and most recruitment efforts are still focused on those aged 25 and under. Consideration should be given to the development of a higher education strategy which would make the case for recruiting older learners into higher education. This strategy would need to focus around at least four areas:

■ Policy: older learners are neglected in part because of the lack of any obvious policy framework addressing their interests. Policy needs to consider:

  (a) target numbers for recruiting older (50-plus) learners over specific time periods

  (b) priority groups that might be targeted, for example, 'early' or 'late' baby boomers

  (c) programme/curriculum areas that need to be developed

  (d) geographical areas (for example those with large proportions of older people) that might be the initial focus for activity.

■ Research: on areas such as the value of education for older people and distinctive issues that need to be addressed in teaching older adults, whether in intergenerational or intra-generational groups. Do teaching styles require modification in the context of teaching a wider spectrum of age groups? What teaching methods are most appropriate to groups returning to learning after a substantial period outside formal education?[87] There is substantial evidence for the persistence of stereotypes about older learners[88] but we need a stronger body of research to develop practical support to lecturers and tutors in educational settings.

- Funding: a strategy for older learners will need funding that can encourage universities to recruit among this group and can find new sources of funding for older learners. At present, self-funding or employer-supported fees are the main sources supporting older learners. The self-funded stream will remain an important element although more information is needed about the range of fees appropriate to particular groups within the older population. Employer support is under pressure in the present economic climate, and older workers may be the first to lose out. Most older learners register as part-time students and most are ineligible for government-funded financial support. Callender and Heller[89] argue for more equal treatment of part-time and full-time students, eventually offering loans and grant support equivalent to that of full-timers on a pro rata basis. Moving in this direction would clearly provide a major stimulus to closing the gap between the participation of older and younger learners within higher education.

- Monitoring participation: older learners are 'invisible' in part because of the absence of routine published data. We need a regular audit of their participation within higher education. An annual report, documenting initiatives through the sector and summarising progress on recruitment targets, would be one approach. This is a priority for bodies such as HEFCE and Universities UK.

Centre for Lifelong Learning (CLL), University of Aberdeen

The CLL at the University of Aberdeen promotes wider access to higher education. It works with schools and colleges within the university and through collaborative partnerships with external organisations. One of its stated objectives is the 'identification and analysis of market need, development and innovation in delivery and curriculum'.

http://www.abdn.ac.uk/lifelonglearning/

Birkbeck Institute for Lifelong Learning (BILL)

The Birkbeck Institute for Lifelong Learning (BILL) is part of the School of Continuing Education at the University of London. BILL promotes 'new ways' of researching lifelong learning which bridge academic, policy and community contexts, with a particular focus on pedagogies of lifelong learning.

http://www.bbk.ac.uk/ceresearch/bill/

Centre for Lifelong Learning, Cardiff University

The Centre provides around 700 lifelong learning courses in approximately 100 venues across south-east Wales. It has a continuing professional development scheme that provides short courses to businesses, public sector employers and individuals. Business and language training is provided at all levels. One initiative developed by the centre is the 'widening access team', which organises events and activities aimed at raising the aspirations and attainment of adults wishing to return to learning at a higher education level.

http://www.cardiff.ac.uk/learn/

Office of Lifelong Learning, The University of Edinburgh

The Office of Lifelong Learning at the University of Edinburgh provides part-time and short courses in a variety of subjects. Each year, there are approximately 12,000 enrolments from local people returning to learning or professionals seeking to develop their skills.

http://www.lifelong.ed.ac.uk/

Centre for Lifelong Learning (CLL), The University of Hull

The CLL at the University of Hull offers a range of short courses ranging from '"confidence building" to project management, from family history to psychology, from Greek to Russian'. The courses are taught at various centres throughout the region.

http://www.hull.ac.uk/cll/

Department of Continuing Education, Lancaster University

The Department of Continuing Education at Lancaster University hosts a variety of part-time courses targeted at older learners, some which are available under its 'learning from home' programme. The department has also launched a new programme, funded under the Government's Learning Revolution Transformation Fund, linking the department's senior learners' programme with Morecambe University of the Third Age.

http://www.lancs.ac.uk/depts/conted/

Institute of Lifelong Learning, University of Leicester

The Institute of Lifelong Learning at the University of Leicester is involved in a range of activities including adult learning, professional development and research. It offers formal qualifications as well as specialist interest courses. Students can enrol for part-time degrees, diplomas and certificates with distance learning in some cases. Since 2005 the Institute has organised a seminar series with the theme 'Lifelong learning, older people and society'. The aim is to explore the 'potential benefits of learning activities for older people and wider society in different areas of public policy'.

http://www.le.ac.uk/ad/

Institute of Education, University of London

The Institute's Department of Lifelong and Comparative Education mainly focuses on lifelong education and training after the school system. The academic expertise within the department includes

- adult and community education
- vocational education and training
- skills and learning for work
- higher and university education.

The Department of Continuing and Professional Education has developed a blended learning programme for staff supporting people in later life activities: *Issues in Educating and Training Mature Adults 50 plus* (launched February 2010).

http://ioewebserver.ioe.ac.uk/ioe/cms/get.asp?cid=16526

http://www.ioe.ac.uk/study/departments/355.html

The Institute of Lifelong Learning (TILL), The University of Sheffield

TILL is part of the School of Education at the University of Sheffield and offers a wide range of part-time courses of relevance to older learners.

http://www.sheffield.ac.uk/till/

Senior Studies Institute, University of Strathclyde

The University of Strathclyde has taken an active lead in meeting the needs of older learners. The Senior Studies Institute was established in 1991 and forms part of the centre for lifelong learning at the university. The Senior Studies Institute describes itself 'as a European centre of excellence for lifelong learning for people over 50'. The institute is engaged in research into issues of later life and dissemination of knowledge about the human resource value of the older population. It provides daytime classes, seminars and access to university courses. For a review of the initial development of the institute, see Withnall and Percy.[90]

http://www.cll.strath.ac.uk/ssi.html

Universities Association for Lifelong Learning (UALL)

UALL is a charity that represents the higher education lifelong learning community, previously known as the Universities Association for Continuing Education. The overall aim of the association is to stimulate good lifelong learning for higher education providers. The association has co-opted members from leading policy, professional and funding bodies.

http://www.uall.ac.uk/

Centre for Lifelong Learning (CLL), The University of Warwick

The CLL at the University of Warwick provides a range of higher education courses including open study modules, certificate and counselling courses, part-time degrees and foundation courses.

http://www2.warwick.ac.uk/study/cll/

Canada

McGill Institute for Learning in Retirement, Montreal

The institute is built around 'peer learning' through participation in self-directed study groups of between 10 and 22 members. The groups are led informally by peer moderators who are themselves members of the institute. Members are encouraged to do research and to use the McGill Libraries. There are no educational prerequisites and no age limitations.

www.mcgill.ca/milr/

Simon Fraser University, British Columbia

Simon Fraser University (SFU) was the first university in North America to create a series of specially designed courses for seniors at the post-secondary level. The university established courses, beginning in 1974, focused upon older people's 'need and capacity for involvement, and participation' in advanced education, while ensuring their 'unrecognized and untapped intellectual and physical abilities' were properly facilitated. Originally envisioned as a series of adjunct general arts and science credit courses tailored for seniors, SFU administrators wanted to encourage mature learners to work towards a diploma, and eventually a full undergraduate degree. Older students, however, would be subject to the same academic requirements as any other prospective undergraduate students. The new diploma called for older students to complete a total of 15 credits in five core subject areas, including English literature, biology, physics, chemistry, philosophy and political science. An additional 15 elective credits could be completed in any discipline, with a recommendation that at least eight of these credits should be in upper division course work.

http://www.sfu.ca/seniors/about.htm

University of Regina, Saskatchewan

The Seniors Education Centre (SEC) was established in 1977 to provide lifelong learning programmes within a supportive environment for those 55 years of age and over. SEC programmes aim to stimulate the intellectual, emotional and physical wellbeing of older adults in order to enrich their lives and enhance their wellbeing. Approximately 180 courses are offered at SEC each year. SEC is a partnership between the Seniors' University Group Inc and the University of Regina Centre for Continuing Education.

www.uregina.ca/cce/seniors/

European Approaches to Intergenerational Lifelong Learning (EAGLE)

EAGLE is a European consortium with objectives which include work to pilot and validate a set of intergenerational 'learning sets' and a 'practical toolkit' for practitioners; to support the exchange of ideas and experiences of learning between the generations; to create professional dialogue between researchers, developers, practitioners, age group representatives, policy consultants and policymakers; to encourage innovative and alternative learning pathways of lifelong and life-wide learning; and to support the intergenerational contract in private and professional lives of European citizens.

http://www.eagle-project.eu/

IANUS Life Long Learning Project

IANUS consists of a number of European-based partners focusing on learners aged 50-plus and still employed or seeking employment. The project explores the following issues:

- What are the key factors determining later learning?
- Are these key factors differently developed or accepted?
- What steps have to be taken on a European and national educational policy level to foster later learning?

http://www.ianusllp.com/index.html

Ireland

The funding of the educational system in Ireland requires student fees for all part-time and modular courses in publicly funded third-level institutions, a policy which has deterred older learners. In order to meet the demand for educational activity among older learners, a voluntary organisation – Age and Opportunity– has been established. Its aims are 'to challenge negative attitudes to ageing and older people and promote greater participation by older people in society'. Computer and IT training is one of its key activities.

http://www.olderinireland.ie/

The Netherlands

Hoger Onderwijs voor Oudere (Higher Education for Elderly) is equivalent to the British and French U3As. HOVO started rather late in the Netherlands compared to U3As in other countries. The initiative was taken up by the University of Groningen in 1986. In 1990, the National Association of HOVO was founded. In 1991, it became a member of the International Association of Universities of the Third Age. The relations between HOVO institutes and their universities are rather diverse. Some are part of a service provided by the university proper, some are part of a foundation established by the university, still others are only related by a more or less formal agreement. The major practical problem for HOVO is financial. HOVO is neither legally administered by universities nor financed within their budgets. Generally, the only support given by universities is indirectly through the free use of their facilities. Sponsoring of HOVO is very limited and the main source of income is student fees.

The courses are mostly, but not exclusively, taught by (former) university lecturers. The courses usually consist of two lectures per week for roughly ten weeks. In some cases tutorials are added. Course participants are supposed to study about six to eight hours a week at home. Usually an examination can be taken, but it is not obligatory; some reject the exam on principle. The most popular subjects are cultural, social and philosophical, with history as the favourite. Courses in natural sciences are rare, but they have recently been encouraged by the National HOVO Association. Language courses (as distinct from literature) are also rare because there is ample language training already available outside HOVO.

http://www.hovo-nederland.org/index.php?id=8

Spain

Spain has a number of university-based lifelong learning programmes. The University of Alicante's Permanent University (UPUA) is a scientific, cultural and social development programme aiming 'to promote science and culture, as well as intergenerational relationships, in order to improve older adults' quality of life and encourage them to participate in community activities'. The UPUA collaborates with government education departments and local government, as well as banks and financial institutions.

The UPUA programme is integrated into the framework of specific university education for older adults and responds to such demands as the need for a deeper democratisation of knowledge, a reduction of social inequalities, a greater social involvement of older adults in society, and the enhancement of intra- and intergenerational relationships, all of which will contribute to maintaining their quality of life and, besides, will enlarge the range of options available for them to continue active life outside their normal working environment.

The Permanent University has a target population of individuals aged 50-plus who are resident in the Valencia area. It was established in 1999 and has approximately 900 students studying across four university centres.

http://www.ua.es/en/upua/

USA

The arrival of the American baby boomer generation at the age of retirement and the fact that this generation is better educated than previous generations is fuelling the demand for higher education among older people. Another important factor driving demand is the growing number of 'retirees' who return to the labour market. This demand is being met not only by universities and other traditional higher or adult education institutions but has also generated through community-based non-profit organisations as well as profit-run businesses.

A major not-for-profit organisation is Exploritas (formerly Elderhostel), an educational travel organisation focused on adults aged 55 and over, running campus-based residential courses serving more than 160,000 participants each year. The background to the development of Elderhostel is reviewed in Mills.[91] The average age of those on Elderhostel programmes is around 73 with nearly two-thirds female and a similar proportion who are college graduates. The renaming of Elderhostel as Exploritas is an attempt to draw in younger cohorts, in particular those from the baby boomer generation.

http://www.elderhostel.org/

Lifelong learning in the USA is organised under the umbrella organisation the Osher Lifelong Learning Institute (OLLI). The OLLI's National Resource Center is based at the University of Southern Maine and has a network of 119 lifelong learning institutes in the USA.

http://usm.maine.edu/olli/national/

Universities of the Third Age

Many countries have a strong tradition of adult learning, drawing on models of the University of the Third Age (U3A). Established in France in 1972, the idea spread rapidly throughout France and then to Belgium, Switzerland, Poland, Italy, Spain and across the Atlantic to Quebec and California. In the UK, U3A was founded in 1981 through the establishment of the Forum for the Rights of Older People to Education.

http://www.u3a.org.uk/

EFOS

The European Federation of Older Students at universities is a non-governmental organisation with advisory status at the United Nations. The aims of EFOS include:

- fostering the studies and training of older people (above 50) at universities together with younger students or at universities for seniors
- ensuring possibilities for higher education for older people in Europe
- improving the quality of life and social standing of older persons by giving them the possibility to study at university
- public support of matters regarding education.

http://www.efos-europa.eu/efos-e/

Note on data sources

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