



**The Association for
Education & Ageing**

**THE LATEST ON LATER LIFE LEARNING – MAY 20, 2008
At Leicester University**

SUMMARY DOCUMENT FOR PRE-CONFERENCE INFORMATION:

***LATER LIFE LEARNING: A REVIEW OF THE
LITERATURE***

**Prepared by Sasha Anderson
On behalf of the Association for Education and Ageing**

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For further copies or information contact aeasecretary@googlemail.com

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Executive Summary

Europe's population is ageing, as a result of continuing increases in longevity and a decline in fertility rates. By 2050 it is predicted that Europe's share of the world population will have fallen to just 5% and that more than one-third of that population will be aged over 60. The ratio of workers to the economically inactive (the so-called 'old-age dependency ratio') is predicted to decrease from current levels of around 4:1 to 2:1. Family structures are changing and the bridges between the various stages of life are becoming more complex. Such unprecedented demographic and social change presents significant political, social and economic challenges to governments across Europe. In this context, the arguments for ensuring that learning opportunities exist for older people are starting to be accepted.

A range of encouraging initiatives and policy statements relating to older people have been produced in recent years, which have included references to the importance of learning in later life. However, government strategy and spending decisions are still often made in isolation from each other and, despite recent policy initiatives, there is a lack of joined-up working.

Over the last ten years the overall participation rate of older people in learning in the UK has remained broadly static. Worryingly, recently published participation figures show a dramatic drop in the number of adult learners participating in publicly funded adult learning. Between 2004/5 and 2006/7 the number of adult learners in publicly funded provision fell by over a million, with the greatest proportion of learners lost from those aged over 65. The loss of a large number of older learners from Further Education (FE) and Personal and Community Development Learning (PCDL) is a matter of concern.

The range and variety of learning involving older people taking place, however, is enormous, and most of it is unrecorded. Despite the significant loss of older learners from publicly funded provision it seems that many older people are continuing to engage in learning elsewhere. The range of providers of later life learning opportunities include self-help agencies organised by older adults to meet their own learning needs, mainstream education providers, employers, as well as a diverse range of community and voluntary organisations whose activities may not be explicitly related to education. A great deal of later life learning also takes place informally, and this is being recognised in the government's current Informal Adult Learning consultation.

There is tacit acceptance amongst practitioners, older people, and increasingly amongst policy makers, that engagement in learning activities in later life is beneficial. Older learners themselves identify social and personal development and enjoyment of learning as key benefits. There is some evidence of the benefits of later life learning to mental health and to improving access to social and community networks. Other areas which require further research include the

benefits of learning for work and employment in later life and the potential benefits for the economy. Research evidence is emerging to confirm belief in the value of adult learning, but there is still a lack of sound research relating to older people.

Individual motivations for learning change throughout life and can be diverse. Motivations based on passion for the subject, pleasure of learning, improving self-confidence and opportunities for social contact increase with age, whilst motivations based on work, qualifications and personal development decrease with age. Motivation to participate in learning in later life also seems to be closely linked to an individual's level of education and attitude to learning. Barriers to participation, although not always easily categorised, can be classified as situational, institutional, informational and dispositional. Of these, dispositional barriers (the perceptions, attitudes, beliefs and values held by older people towards 'learning') seem to be particularly important. Social contexts can also inhibit or facilitate learning in later life, and greater awareness is needed of these and the opportunities and challenges that they present.

A number of teaching and learning issues in relation to later life learning remain under-explored and not fully understood. These include curriculum relevance, learning and teaching methodologies in later life learning, the importance of accreditation for older learners, the learning needs of 'non-participants', and understandings of the concepts of 'learning' and being a 'learner'.

Capacity for learning in later life is still a subject of research and debate, but some of the myths and stereotypes associated with ability to learn in older age are being refuted by evidence. Stereotypes that do seem to have a basis in fact, such as older people taking longer to learn new things, have been shown to be subject to wide individual variations, and capable of being reduced or offset by compensatory strategies.

Conclusions

The general impression emerging from the literature is that 'later life learning' displays great diversity in terms of the scope and variety of learning on offer, involves a vast number and range of learners, and much of the learning is not captured in data or widely disseminated. There is concern that the needs of older 'non-learners' without a history of engagement are not being recognised, and that attitudinal change is needed to facilitate more people to engage in learning in later life. The need for more research, better joined-up thinking, and for criteria for identifying, developing and sharing 'good' practice, also emerge as key themes.

The Task

As agreed with AEA and specified in the project brief, the overall aim of this literature review was to provide '*an overview of the current field of knowledge regarding learning in later life*'. Specific aims identified were:

- to identify major themes, including strengths and weaknesses in our understanding;
- to analyse the extent to which the value of learning in later life is understood and reflected in policies at government and organisational levels;
- to describe and catalogue good practice regarding learning in later life, in the provision of both educational and other services;
- to provide evidence in relation to the thesis that learning in later life is a significant factor in older people's capacity to exercise choice, determine their circumstances, express their contributions as well as their needs, engage as citizens and as members of families and communities.

The review would draw on current research, policy and practice.

Scope of the review

It was agreed that, given the time available, the historic reach of the search should be limited to literature from 2000 onwards, although key older sources would be included where appropriate. Literature to be consulted, formal and grey, would include English language publications from the UK and Europe. The search strategy and criteria is described in further detail at the end of this review.

The remit was very broad, covering a wide range of topics. It is acknowledged that the focus of the review is largely on the UK, due to difficulty locating and comparing data for European countries in the time available. However, where possible, reference is made to the current state of later life learning in Europe. An overview of the European policy context, examination of participation data, and examples of European practice are included.

The Bibliography includes a list of key texts which were beyond the scope of this review (pre-2000) but which are considered important to the field of later life learning.

Some notes on Practice

Examples of current practice were to be included as part of the review. However, it became apparent that locating and comparing examples of practice would be more complex and time consuming than initially thought, due to the range of agencies delivering learning opportunities for older people and the lack of a standardised format for recording it. Examples of practice relating to learning in later life were found in a range of literature, such as journals, project reports, conference reports, unpublished documents, organisational websites and newsletters. In the UK, the Older & Bolder programme at the National Institute of Adult Continuing Education (NIACE) has been gathering and disseminating examples of practice on later life learning for many years. However, whilst providing a valuable source of expertise and information for this review, Older & Bolder has not yet developed its proposed 'Database of Good Practice' or collated the information in a systematic way.

In Europe, the European Commission does not provide centralised information on practice in this field. A few European-funded projects were found to be promoting and sharing examples of practice on their websites, but they tended to be focussed on specific subject areas. These include the Learning in Later Life (LiLL) network for organisations involved with the scientific education for older people, the eLearning in Later Life (eLiLL) project which has developed a 'Database of good practice in the use of ICT in the education of seniors in Europe', and the Pan-European Forum for Education of the Elderly (PEFETE) which has also produced a database of good practice. Details of these projects are included in the review.

It further became apparent that identifying 'good' practice from the information available would be problematic. Whilst providers may claim to base their provision for older learners on 'good' or 'best' practice, it is usually unclear what criteria they base this on. This issue will be considered further in the Conclusion.

Definitions

Learning

There is no single accepted definition of 'learning', which is still subject to debate and controversy. The 'learning' referred to in the literature is often not defined. For the purpose of this review, a very broad definition of learning was adopted.

Learning included could:

- be directed or facilitated by someone else, or be self-directed;
- be organised formally, non-formally or informally;
- be at a range of levels (e.g. basic skills, further education, higher education);
- take place in a range of settings (e.g. at home, in a formal learning institution, in the workplace, in a voluntary/community organisation);
- lead to qualifications or be unaccredited;
- be done regularly or for a short period of time (e.g. each day or month, full-time, part-time);
- take place at any time (e.g. daytime, evening).

The following was found to be a useful definition of learning:

“Learning is a process of active engagement with experience. It is what people do when they want to make sense of the world. It may involve an increase in skills, knowledge or understanding, a deepening of values or the capacity to reflect. Effective learning will lead to change, development and a desire to learn more.”
The Campaign for Learning’s definition of learning

Later life

This review assumes that ‘later life’ refers to the stage in life when a person is no longer primarily involved in the labour market, raising a family, or both. Different terms are used in literature and by policymakers to refer to people who are at this stage of life, usually ‘older people’, ‘older adults’ or, now less frequently, ‘third agers’.

Chronological age is becoming increasingly less useful as a way of defining the older population (hence the use of ‘later life’), but in the context of education age bands are usually applied for statistical purposes. Different age bands are used in different contexts to refer to an ‘older learner’ - in formal education it can mean anything from age 25 upwards, for older workers it may mean age 45 upwards, for older learners in residential care it may mean age 80 and upwards. (Schuller, 2002; Withnall et al, 2004). NIACE uses 50 as the basis for its work with older learners. It is usual for government to refer to those aged over 50 in policies aimed at older people (e.g. Department for Work and Pensions, 2005). However, this is not always consistent, and some government departments collecting educational data have an upper age limit of 74, making data collection and comparisons difficult (Withnall et al, 2004). For the purposes of this review, where age ranges are used in the literature, age 50 and above will be considered as referring to those in ‘later life’.

It should be noted that, of course, the group of people that we are referring to incorporates a vast range of age and individual difference. “Older people can be anything between 50 and 100 – all they may have in common is that they have managed to stay alive!” (Withnall et al, 2004, p9).

Why is learning in later life important?

This section includes:

- Demographic context
- The arguments for older people learning
- The Policy context –Europe and UK

Some issues for consideration:

- **‘Joined-up’ thinking?** Initiatives in relation to older people in recent years have been made mainly by government departments in isolation. Is their response consistent? Is an overarching strategy needed?
- **Where is the funding?** The argument for later life learning is starting to be accepted in policy, but is the funding there to back it up?

Section 1: Who are the older learners?

This section examines participation data and surveys in an attempt to gain an overview of who is learning in later life, in what numbers, and what they are learning.

This section includes:

- Participation in the UK
- Participation in Europe
- What are older people learning?

Some issues for consideration:

- **Why no improvement in participation rates?** Participation rates over the last ten years have remained static. Why is this? Is there a need to re-examine what is on offer?
- **Where are the learners learning?** Vast numbers of older people are leaving publicly funded learning, but this is not reflected in the numbers of older people reporting participation. Where are they going?
- **Who are the older learners?** There is a need for more and better participation data, to include age bands, social groupings, ethnic groups, gender, and disability.
- **Who are the ‘non-learners’?** What are their learning needs? How are their voices heard?
- **Are we talking the same language?** How useful are the concepts of ‘participation’/‘non-participation’ to older learners?

Section 2: Provision of learning

This section attempts to provide an overview of some of the main locations in which learning in later life takes place. However, it should be noted that a vast range and variety of learning involving older people is going on, mostly unrecorded, on a daily basis. As Findsen notes, “In terms of provision of educational opportunities for older adults, the range is enormous and generally mirrors the complexity found in other domains of adult education” (Findsen, 2002, p13). It is impossible to cover the full range in the context of this review, and this section does not attempt to provide a comprehensive overview but to highlight the main providers and provision of learning for older people. Where available, participation data, examples of practice, and a discussion of the impact of recent government policy and funding priorities are included.

This section includes:

- Higher Education
- Further Education
- Adult and Community Learning
- Voluntary sector
- Workplace
- Care settings
- Learning at home
- Informal learning
- Other locations and working in partnership

Some issues for consideration:

- **What’s going on?** There is a need for better and more reliable information on provision of later life learning. The scale and variety of learning taking place, with a range of agencies involved, is largely unrecorded.
- **Are there regional variations?** There is a lack of information on regional distribution and differences in learning provision for older people.
- **How much of the practice is ‘good’?** Much of the learning that older people participate in is not generally rigorously analysed or subject to evaluation.

Section 3: Teaching and learning issues

This section looks at some of the teaching and learning issues in later life learning. Many of these issues are common to all adult learners, but may be of particular relevance to older learners. Of course, as noted at the start of this review, older learners are not a homogeneous group. There will be differences between different groups of older learners, for example amongst ethnic and cultural groups, which need to be taken into account.

This section includes:

- Recruitment (of participants)
- Practical considerations
- Learning environment
- Accreditation
- Learning and teaching styles
- Methods of delivery
- Cost
- Curriculum
- Intergenerational learning

Some issues for consideration:

- **What does ‘learning’ mean to older people?** What are the perceptions and expectations of different groups and age cohorts, about the concepts of ‘learning’ and being a ‘learner’? Do they differ to those of the funders, providers and researchers?
- **‘Stayers’ or ‘joiners’?** How can funds be allocated most effectively to engage new, as well as committed, learners?
- **Where can older learners go?** Consideration of progression to further learning and mainstream programmes seems to be largely overlooked.
- **What are the issues for ‘non-learners’?** Most of the research into teaching and learning in later life is based on the views of older people already engaged, many of whom have a history of engagement.
- **Do we know enough about learning and teaching styles and older learners?** Whilst acknowledging the need to not be prescriptive, do we really know enough about learning and teaching methodologies in later life learning and their effectiveness?

Section 4: Benefits of learning in later life

This section examines the value and benefits of learning in later life. The value of later life learning is well known to many adult educators, and NIACE has been collecting testimonies from older learners about the benefits of their engagement in learning for almost 10 years. The annual NIACE Senior Learner of the Year Awards provide powerful and inspiring evidence from entrants and winners about the impact that learning has had on their lives. There is tacit acceptance from those involved in later life learning, and increasingly among policy makers, that engagement in learning activities enhances quality of life, lessens dependency and improves well-being. Research evidence is emerging to confirm this belief, but there is still a lack of sound research relating to the benefits for older people.

This section includes:

- Benefits of learning in later life
- Perceived benefits
- Health – mental and physical
- Economic
- Exercising choices
- Work and employability

Some issues for consideration:

- **Where is the evidence?** There is increasing recognition and belief in the benefits of learning, reflected in policy, but where is the evidence to support it? The benefits of learning in later life are poorly researched and there is a lack of longitudinal evidence.
- **What counts as ‘evidence’ anyway?** The testimonies of older learners offer powerful anecdotal and qualitative evidence of the benefits of learning. Should we trust them more? Is there a need for better engagement with the research community?
- **What are the potential benefits for non-participants?** Research into benefits of learning is focussed mainly on committed learners with a history of engagement. How could learning benefit those who are not?
- **What kind of learning is most effective?** Which groups of older people benefit most from learning? Through what kind of learning activities?

Section 5: Motivations and barriers to learning

“There have been many models developed to explain participation (e.g. Cross, 1981) and typologies to identify barriers to people’s participation in learning activities” (Findsen, 2002, p12).

This section reviews some of the main motivations and barriers that have been identified as affecting an individual’s decision to participation in learning in later life. Section 6 will consider some of the social contexts that inhibit or facilitate later life learning.

This section includes:

- Motivations
- Situational barriers
- Institutional barriers
- Informational barriers
- Psychosocial barriers

Some issues for consideration:

- **What is the role of information and guidance (IAG)?** Despite initiatives over recent years (e.g. Learn Direct) and recent focus on the future of IAG provision for adults, IAG seems to have little impact on older learners.
- **How can attitudes be changed?** Dispositional barriers to learning seem to be considerable. How can they be challenged? What is the role of education in changing attitudes?

Section 6: Social contexts that inhibit/facilitate learning in later life

This section considers some of the social contexts that inhibit or facilitate learning in later life. It is important to be aware of these contexts and the opportunities and challenges that they create when attempting to reach and engage older people in learning. Some of the issues raised have already been covered in earlier sections, and will therefore be highlighted but not discussed in detail here.

This section includes:

- Ageing society and demography
- Attitudes to ageing
- Work and employment
- Retirement
- Life stages and cohort issues
- The role of information and guidance

Some issues for consideration:

- **What role can education play in changing attitudes?** There is still much that needs to be done to change public attitudes and the perceptions of older people towards ageing.
- **What does retirement mean?** With retirement becoming an increasingly extended and complex phase of life, and evidence that the experience of retirement can influence quality of life, is there more that should be done to strengthen the link between retirement and learning?
- **'Stages' rather than 'ages'?** Should there be greater focus on life stages in later life learning?

Section 7: Capacities for learning in later life

This section examines the literature on capacities for learning in later life, both individual and social. It covers:

- Individual capacities for learning - *including*
 - Intelligence*
 - Speed of learning*
 - Memory*
 - Attitudes to learning*
 - Physical factors*
- Social capacities for learning

Conclusions

This review has attempted to provide an overview of the '*current field of knowledge on learning in later life*' through a review of the literature. This has included examination of current and recent research, policy and practice relating to later life learning.

A number of 'Issues for consideration' have been raised at the end of each section in this review. Recurring themes from these include: the lack of up-to-date data and information on participation and provision; the dearth of research and consultation with 'non-participants'; and the need to change attitudes and perceptions about ageing and capacity to learn in later life. In addition, some general conclusions are noted here.

Research

Later life learning is not a widely researched area. Research programmes examining aspects of ageing rarely consider the potential of learning. In particular, there is a lack of evidence about the benefits and value of learning in later life - what research evidence there is has been found to be weak in a number of respects. Longitudinal research is rare.

Policy

Ageing issues are being recognised in policy and, encouragingly, older people's capacity and right to learn is increasingly accepted. The driver for policy in many countries has been concept of 'active ageing', with its emphasis on quality of life and health, rather than the lifelong learning agenda. The current focus on qualifications and accreditation, reflected in the government's current funding priorities, is seen by many as a barrier to older people learning. There is growing recognition of the need for more joined-up thinking across government and agencies concerned with older people in order to improve opportunities for later life learning.

(Good) Practice

Locating and comparing examples of practice is more complex and time consuming than might be expected. This is due to the range of agencies and providers delivering learning to older people, the need to search a range of websites and literature in order to locate information, and the difficulties of identifying what is 'good' practice. With the exception of NIACE and some European projects, few agencies or organisations are collating and widely disseminating examples of practice in later life learning.

Where examples of practice are visible, questions about where the learners come from, where they can progress to and whether the learning involved is 'good' are often unanswered. Criteria used to support claims of good practice are rarely referred to in the literature. One conclusion is that there is a need for an effective tool for self-evaluation of later life learning, which does not seem to exist. Whilst beyond the scope of this review to address this issue, NIACE has for several years been developing and informally circulating an Older & Bolder Good Practice Form for recording practice which might provide a useful starting point for work in this area. This is attached in Appendix 1.

In general, the connections between research, practice and policy around later life learning do not appear to be well made.

Later life learning in 2008

In considering the issues raised in this review, some broad conclusions about the field of later life learning in 2008 can be reached.

Later life learning is:

- **Important** – for a variety of reasons.
- **Valuable** – to older learners, who are clear about the benefits that learning brings to them
- **Diverse** – in the wide range of learners, providers and activities involved.
- **Accepted** – increasingly, as a right of older people. However, attitudinal change, by society and older people themselves, is needed to challenge barriers to engagement.
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Later life learning is not:

- **Joined-up** – the wide range of agencies involved in providing and funding learning activities operate often in isolation.
- **Visible** – so much of the learning that takes place is unrecorded and not widely disseminated.
- **Well understood** – in many respects. For example, there is a lack of understanding of and agreement on: who participates and where learning is taking place, the concepts of 'learning', teaching and learning issues in later life, criteria for good practice.
- **Widely researched** – the potential of later life learning is not generally acknowledged by the academic and research community.
- **Consistent** – provision is subject to regional variations.
- **Rigorously analysed or evaluated.**

It is worth noting that as more highly educated generations with an established pattern of learning age, there is likely to be greater interest in and demand for learning opportunities. Changing social structures and more flexible and complex life stages will require a better understanding of the issues surrounding learning in later life.

Search strategy

Criteria for choice of literature:

- Published from 2000 onwards, unless of particular importance
- English language publications from the UK and Europe
- Obtainable within the time frame of the review

Type of literature:

- Published material (e.g. books, peer reviewed or professional journals, policy statements, project reports, organisational newsletters)
- Conference proceedings and papers published on the Internet
- Unpublished reports and reviews

The following strategies were used for locating relevant literature.

Search of electronic databases:

ERIC British Education Index Social Science Citation Index
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Search terms were wide, and were selected after examining the thesaurus of each database. Search terms included *older adults*, *adult education*, *lifelong learning*.

Other sources:

Hand search of NIACE Older & Bolder reference library Material produced by EU-funded projects Hand search of journal <i>Ageing and Society</i> Items recommended by members of AEA committee and NIACE Older & Bolder team

Websites consulted included:

- | |
|--|
| <ul style="list-style-type: none">• Agencies concerned with older people: e.g. Help the Aged, Age Concern• Bodies and organisations funding/conducting relevant research: e.g. Economic and Social Research Council, Joseph Rowntree Foundation; Centre for Research on the Wider Benefits of Learning, Centre for Policy on Ageing, NIACE• Policy/strategy: e.g. Department for Innovation, Universities and Skills, Department for Work and Pensions, Department of Health, Welsh Assembly Government, Learning and Skills Council, EUROPA• Projects/networks: e.g. European Older Women's Network, Europe, Learning in Later Life (LiLL)• Academic: e.g. University of Strathclyde Senior Studies Institute, University of Leicester 'Lifelong Learning, Older People and Society Seminar Series'• Library catalogues: e.g. COPAC, Open University• Providers: e.g. U3A |
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Key texts archive