

# Higher education study in later life: what is the point?

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## **ABSTRACT**

This article reports a study of older people in higher education, their socio-economic characteristics and the motivations and reported benefits of their studies. Whilst research on older learners is growing, particularly the benefits of the learning process itself, little is known about those who engage in higher education study. The findings are reported of a survey of graduates from the two UK higher education institutions that specialise in part-time study provision. The study population is distinctive in two respects: their participation in the accreditation process and that they complete with a formal qualification. It is shown that, whilst a sizable proportion of the middle-aged and older students are well-off and well educated, there is also considerable heterogeneity and that many are making up for opportunities lost earlier in life. A substantial proportion of the ‘middle-aged’ graduates still saw qualifications as a pathway to enhanced employment opportunities, whereas the older graduates placed more weight on wider benefits. The qualification was seen as an important aspect of their chosen study. Using the responses to qualitative interviews, the article explores the role of the qualification in the lives of the older graduates, and illustrates how this particular kind of study is an element of their strategies to manage the transition from work to retirement, and to make life in retirement more meaningful.

**KEY WORDS** – learning, higher-education study, active ageing, retirement.

## **Ageing, lifelong learning and higher education: concepts and policies**

This article focuses on older people in higher education, in many ways an ‘exclusive’ rather than ‘excluded’ section of the population. Changing labour market demands and globalisation processes have led to increasing national and international debate about adult education policies. The worldwide ageing of populations has spurred the formulation of generic policy principles to meet the needs of both societies and older people themselves, but in both international policy declarations and national

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policy deliberations, ‘older people or ageing’ and ‘education’ are only sporadically connected, mostly in the limited sense of education that promotes ‘productive roles’. As far as ageing and older people are concerned, the aim of *active ageing* is by now firmly embedded in the worldwide policy discourse. Thus, the value of older people’s independence and participation are widely promoted, as by the United Nations Organisation (UNO 2002), and the European Union (EU) (Commission of the European Communities 2002). In the sphere of health, *active ageing* is promoted by the World Health Organisation (WHO 2005), and in the sphere of employment, *productive ageing* is advocated by the Organisation for Economic Co-operation and Development (Cotis 2003).

References to *educational goals* are often in terms of enhancing the productivity of older workers, and enabling older people to adjust to technological change. This is manifest in the objectives of the *Madrid International Plan of Action on Ageing 2002*, specifically in its Issue 4, ‘Access to knowledge, education and training’ (UNO 2002). During the last decade, the concept of *lifelong learning* has become dominant in the adult education discourse. *Learning* has become preferred to *education*, which emphasises the role of the learners themselves rather than the providers. This stress on the learners’ needs can be seen as progress, but more cynically as transferring the responsibility for learning from governments to individuals. *Lifelong* explicitly implies that learning should continue throughout life, but it is evident from many policy documents that their concern is primarily with enhancing and updating skills for work, especially among younger workers. The European Union has promoted educational initiatives in several areas, and designated 1996 as the ‘European Year of Lifelong Learning’. As in many of its ‘social’ measures, EU education policy is strongly focused on employment issues, but nonetheless its discourse has adopted a wider notion of lifelong learning, which is defined as ‘all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective’ (PJB Associates 2001: 1).

The lifelong learning concept has also entered higher-education policy discourse in many affluent countries. The ‘World Declaration on Higher Education for the Twenty-first Century’ of the United Nations Educational, Scientific and Cultural Organisation (UNESCO 1998) emphasised the need to focus on students ‘within a lifelong perspective’, and to provide flexible entry and exit points, and access ‘at any age and without any discrimination’ (Article 3[a]). This accepts, if not explicitly, the principle that older people are legitimate users of higher education. In practice, however, concepts like ‘lifelong’ or ‘any age’ commonly refer mainly to younger adults. In the United Kingdom, for example, higher

education policy debate has been dominated by measures aimed at 'widening participation'. The official government target is that the rate of participation in higher education by 2010 will be 50 per cent of those aged 18–30 years. There has been less concern, however, for those aged over 30 years, let alone those over 50, 60 or 70 years, although recent policy measures in England have improved funding for older students.

### *Older people, learning and formal study*

Learning takes place in many settings and ranges from purely informal (everyday life) learning to formal study in a structured setting. A recent study by the OECD (2005) of adult (25–64 years) learning, defined in the widest sense, found that participation was highest in most Nordic countries. The United Kingdom (UK) and Switzerland were not far behind, whereas Hungary, Portugal and Poland had the lowest participation rates. Two relationships are widespread: a positive association between prior educational attainment and participation in formal learning; and a decline in participation with increasing age. As too common in education research, the OECD study provided no information about those aged 65 or more years, but the regularly conducted UK *National Adult Learning Survey* (NALS) includes adults of all ages. That of 2002 found that 54 per cent of those aged 50–59 years reported some taught learning, as did 35 per cent of those aged 60–69 years, and 18 per cent of those aged 70 or more years (National Centre for Social Research 2002). For those aged in the fifties, almost all the learning was vocational, but even for those aged 60–69 years, only 30 per cent was of this kind. Eleven per cent of all taught learning was at higher education institutions (12% of vocational and 8% of non-vocational). The largest provider of taught learning (31%) was the employer. Sixty-five per cent of those who had experienced taught face-to-face learning had taken courses lasting no more than three months. Those aged 70 or more years were more likely to have done a course provided by an adult education institute (27%); a charity (11%) or a community centre (11%) (2002: 60).

It is clear from these figures that only a minority of older people participate in formal learning, and that even fewer engage in higher education. But some do, although we know little about them. Davey (2002) has provided some details about older students at a New Zealand university, and showed growth in employment-related university courses for those aged 40 or more years. As regards the oldest – post-retirement – learners, much (educational) gerontology research in the UK and elsewhere has emphasised the many ways in which adults (including older people) learn, which reminds us that involvement in formal education is a

small fraction of people's learning activities (see Carlton and Soulsby 1999; Withnall *et al.* 2004; Withnall 2006; Mehrotra 2003, Kim and Merriam 2004). Non-formal and informal ways of learning have been explored, and much research has examined learning in different types of community groups and the needs of older learners.<sup>1</sup> Research on structured learning and teaching has explored principally what we call non-assessed learning, *i.e.* learning for purposes other than formal accreditation. Examples of recent typologies of the purposes and benefits can be found in Jarvis (2004), Mehrotra (2003), Kim and Merriam (2004), Lamb and Brady (2005). Whilst emphases and terminologies vary, they all tend to feature the goals of personal growth, the development of new skills and confidence, life review, and the search for meaning in life.

Typologies of the benefits of learning facilitate our understanding of education in later life. Depending on the nature of the learning activity as well as individual circumstances, learning and study mean many different things and serve many different purposes. Many research questions are raised by the typologies. What *aspects* or features of the learning serve the different purposes? What is the meaning of these different aspects in the *lifecourse* of individual learners? A previous study showed some of the ways in which various study activities endorse and meet the needs of people with different life histories, personalities, educational attainments and lifecourse stages (Jamieson, Miller and Stafford 1998).

The research reported here covers a very specific group of learners, older part-time university students, who have pursued a programme for and obtained a *qualification*. They are less numerous than those who attend classes but do not take a qualification (Adshead and Jamieson 2001). Relatively little is known about part-time mature students, and even less about the older students. The study is of graduates from the two largest UK universities that specialise in part-time provision: Birkbeck, University of London, and The Open University. It profiles the students, with particular attention to their heterogeneity, and to the differences between older and younger learners and between learners and the general population, and it addresses their aims in studying for a qualification. It is believed that a better understanding of the role of formal study in older people's lives will illuminate more general aspects of later life, including the needs and aspirations of older people.

### **Aims and methods**

The overall aims of the reported study were to understand more about the characteristics and the motivations of mature part-time students, and to

provide evidence of the economic as well as social benefits of their studies. It was designed as a longitudinal study with three waves of data collection. It began in 2003 with a postal questionnaire survey of graduates' socio-economic characteristics, reasons for study, and the short-term outcomes (it was administered a few months after the students' graduation).<sup>2</sup>

The research completed to date has focused on the Birkbeck graduates, but the initial postal questionnaire was also administered to a sample of Open University graduates.<sup>3</sup> This paper reports analyses of the data from the first-wave quantitative survey and from qualitative interviews conducted in 2000 for a study of a cohort of new entrants to Faculty of Continuing Education courses at Birkbeck (Adshead and Jamieson 2001). For the Birkbeck students, the first-wave questionnaires were posted to all who completed their programme of study in the summer and autumn of 2003, that is to 600 undergraduate-degree finalists (constituting 22 per cent of all finalists), 1,000 postgraduates (mainly awarded masters degrees, and 37 per cent of all finalists), and 1,100 certificate and diploma graduates (41 per cent of all finalists). Altogether, 1,539 completed questionnaires were received, a response rate of 58 per cent (similar for all three types of graduates). The OU students complete their studies in January, so questionnaires were sent out early in 2004. Because there were more than 30,000 OU certificate, degree and postgraduate awards in 2003, the questionnaire was sent to a stratified sample of 3,000 (one-third for each of the three groups: certificate and diploma graduates; undergraduates; and postgraduates). Some 1,533 were completed and returned, a response rate of 51.1 per cent. In the analysis and tabulations, the figures have been weighted to represent the profile of all OU graduates in that year (64% certificate and diploma graduates; 30% undergraduates; and 6% postgraduates).

For both universities, information about age, qualification awarded and subject area was available from administrative records. The questionnaire collected socio-economic characteristics (including marital and employment status, income, family relations, and community involvement), reasons for enrolment, and outcomes (including both economic and social benefits). Most questions were pre-coded although space was allowed for further information, which very few used. The qualitative, supplementary information was from 20 semi-structured life-history interviews in 2000 with newly-enrolled students aged 60 or more years. These interviews explored the meaning of formal study to the students, whether or not they were aiming for a qualification. For this paper, the information on the significance of the qualification was re-analysed.

TABLE I. *Age and gender of Birkbeck and Open University graduates, 2003/04*

Age groups (years)	Gender (percentages)				Age group percentages	
	Birkbeck		Open University		Birkbeck	Open U.
	Female	Male	Female	Male		
30 and under	67	33	73	27	20	13
31–40	63	37	63	37	35	34
41–50	66	34	66	34	22	33
51–60	63	37	65	35	12	13
61+	59	41	58	42	8	7
All	64	36	65	35	100	100

*Notes:* The population or sample sizes were: Birkbeck 1,539, and The Open University 1,533.

### Study at Birkbeck and The Open University

Birkbeck<sup>4</sup> and The Open University<sup>5</sup> both specialise in part-time higher education provision for mature students. Both offer numerous taught programmes, which include certificates, diplomas, bachelor degrees and postgraduate qualifications. Birkbeck courses are taught through classes, mostly in the evenings, at its campus in the centre of London and elsewhere in Greater London. Some certificate and diploma classes are also held during the day, and attract many not in paid employment, including retired people. The Open University's courses are offered throughout the country, through distance-learning media including BBC radio and television broadcasts, complemented by face-to-face group tutorials of varying frequency and duration.

### Background characteristics of the students

#### *Age, gender and ethnicity*

It is always a challenge to define 'older' in terms of chronological age, as any cut-off point is arbitrary. In educational settings, certainly university education, students aged over 21 years are characterised as 'mature', and to many, not least the students, anyone aged over 40 years is an 'older student'. In this article, the focus will be on the oldest group, defined as 60 or more years, but 'middle-aged' students are also of interest, particularly in view of the demographic changes and the need to retain or re-employ older workers.

The Birkbeck students were aged from the twenties to the seventies. As one would expect, the age distribution was younger than in the UK adult population, but 40 per cent were over 40 years of age (Table 1).

TABLE 2. Award level by age, Birkbeck and Open University graduates, 2003/04

Age group (years)	Award level					
	Birkbeck			Open University		
	UG	Cert/Dip	PG	UG	Cert/Dip	PG
	<i>Percentages</i>			<i>Percentages</i>		
30 and under	21	35	44	14	67	19
31-40	25	30	45	24	57	19
41-50	25	36	40	31	55	14
51-60	28	43	29	50	42	8
61 or more	17	64	19	60	37	3
All	24	37	39	31	54	15

*Notes:* For both institutions and for all age groups, the percentages sum to 100. UG: Undergraduate/bachelors degrees. Cert/Dip: Undergraduate Certificates and Diplomas. PG: Postgraduate qualifications (mainly Masters degrees).

One-in-five was aged over 50 years, and eight per cent (124 respondents) were aged over 60 years. The age profile for The Open University graduates was similar, but with a slightly higher proportion of graduates of middle age (40-59 years), and slightly fewer at the youngest and oldest ages. Women outnumbered men by almost two to one, in both institutions and for all age groups up till 60 years, but at older ages the male proportion increased. Among the few aged over 70 years, at both institutions there were approximately equal numbers of women and men. In general in Britain, women outnumber men in part-time education, and many are making up for opportunities lost earlier in their lives. The tendency for the male proportion to be higher in the oldest cohorts (65 or more years) is likely to be a cohort effect from their *prior* higher educational level: as will later be examined more closely, those already well educated tend to be most strongly attracted to further education in adulthood. Furthermore, there is likely to be a gender differential in the 'retirement effect', with more men than women enrolling to manage the transition from work to retirement. On the ethnicity of the students, nearly 80 per cent of the Birkbeck graduates self-described as White. Ethnic-minority students were more numerous among the young and middle-aged. The pattern was similar for the OU graduates from London, and there were even fewer from ethnic minorities among OU graduates from the rest of the UK.

#### *Level of qualification and subjects of study*

Table 2 shows that the majority (64%) of the Birkbeck students aged over 60 years graduated with a certificate or diploma. These programmes are taught at undergraduate level, mostly at first-year equivalent. The study

TABLE 3. *Marital status by gender on entry to course of students aged 61 or more years, Birkbeck and Open University, 2003/4*

	Birkbeck		Open University	
	Female	Male	Female	Male
	<i>Percentages</i>		<i>Percentages</i>	
Single	19	13	3	4
Married/partnered	60	73	73	84
Divorced/separated	11	4	8	7
Widowed	11	9	16	5
Total	101	99	100	100

*Notes:* Totals that are not 100 % are through rounding.

involved in qualifying for a certificate or diploma entails less time than degree study, typically one evening a week during terms, compared with two or three evenings per week for undergraduate degree and postgraduate study. It is more flexible, and students can accumulate credit points towards a certificate over three or more years. Furthermore, these programmes are cheaper, and access to most certificate courses is open. This kind of study appears to be more attractive to older students, more of who are motivated by general interest than by the need for a high level qualification (discussed further below). The structure of OU degrees is very different, with much less distinction between certificate and degree modules, and more flexible options for progression. This is likely to explain the very high proportion of undergraduate-degree students among the older OU respondents (Table 1). Even among the older students at Birkbeck, many were studying for a first degree or postgraduate qualification; indeed, those aged in their fifties had the highest proportion of undergraduates of all age groups, and nearly one-third were postgraduate students. The OU had relatively fewer postgraduate students, and most were in the younger age groups. The majority of the oldest students in both institutions studied arts subjects and, in fewer cases, social science subjects. The most popular courses among the Birkbeck graduates were history, literature, philosophy, archaeology and religious studies.

### *Marital status*

The marital status of the two institutions' students differed considerably, even among the oldest graduates (Table 3). Comparing the older Birkbeck respondents with the general UK population of the same ages, there were high representations of single students, particularly among women, and fewer widowed-female students (11 % of the students aged more than



60 years, compared with 25 per cent of the general population aged 60–74 years in 2001). Dench and Regan (2000) also noted that relatively few older learners were widowed. Furthermore, a previous study showed that widowhood, although important for some, is not an overwhelmingly important trigger for engagement in formal university study (Adshead and Jamieson 2001). The high proportions of women and single people among the students can be explained in terms of lifecourse factors: compared with married and widowed women, single women are more likely to have been involved in courses and in other activities outside the home. Among the older students, more were married and fewer single at the OU than at Birkbeck. It may therefore be that, because study for OU courses is largely at home, they are more attractive to ‘domestically-oriented’ students.

### *Employment and socio-economic status*

The employment status of the oldest students (aged 61+ years) at the start of their study was similar to the general population: about one-quarter of both men and women were in full-time or part-time employment, and just under one-half were retired. By their self-reports, the vast majority of the employed students had senior or middle professional or managerial occupations, and the older students were no different in this respect. The students’ incomes varied considerably. Those aged 51–60 years had the highest incomes, with nearly 40 per cent of Birkbeck and one-quarter of OU respondents reporting a household annual income of £50,000 or more. Among those aged more than 60 years, a smaller proportion of the OU students (12%) than Birkbeck students (17%) reported this level of income. Among those with annual household income of less than £20,000, those aged over 60 years predominated. Overall, the OU respondents had lower incomes than the Birkbeck students, which matches the differences in course fees – Birkbeck degrees entail higher fees over a shorter period than OU degrees, and the majority of the low-income older Birkbeck students were taking certificates and diplomas.

The majority (over 60%) of the Birkbeck students had an undergraduate degree or a higher qualification at the time of entry, and those aged 60 or more years were particularly well qualified, with over one-in-five having a postgraduate qualification. There was no significant difference between the older men and women. Even for those studying for certificates and diploma, for which access is normally open to all, about one-half of the respondents, including those aged 60 or more years, possessed a first degree or above. We do not know the subjects of their previous qualifications, but it is clear from a previous study that many Birkbeck students, young and old, embark on a new subject (Adshead and Jamieson 2001).

TABLE 4. *Involvement in activities and organisations at the start of course, Birkbeck and Open University older students*

Ages (years)	Sports		Drama		Voluntary organisation		Residents' organisation		Political organisation		Religious organisation	
	Bbk	OU	Bbk	OU	Bbk	OU	Bbk	OU	Bbk	OU	Bbk	OU
51–60	50	35	34	28	40	30	25	20	36	27	19	34
61+	37	34	49	29	38	32	33	13	30	11	34	35

*Notes:* The percentages are of the given age group. Bbk: Birkbeck. OU: Open University.

There was, however, a sizable group of entrants with modest qualifications, especially among the OU entrants, among whom nearly one-half had had previous higher education experience and over 40 per cent were less well qualified. It is clear that while many of the younger and older students were 'well educated' and 'middle class' when compared to the general population, overall there was considerable heterogeneity. The older students did not stand out as very different from the younger ones, except that the retired had lower incomes. At both institutions, there was a group of decidedly not 'well off' students, with low incomes and low previous qualifications.

#### *Involvement in other activities*

The older learners in the study, particularly at Birkbeck, seemed generally more active outside the home than older people in general, and indeed more than many younger learners. For example, their involvement in sports clubs and gyms, whilst lower than among the younger students, was still substantial and higher than in the general older population. At both institutions, more than one-third of those aged in the sixties were involved in such activities (Table 4). Data from the *English Longitudinal Study of Ageing* show that among those aged 60–64 years, 18 per cent of men and 22 per cent of women were members of a sports club or gym (Marmot *et al.* 2003). The older students' involvement in community groups, religious organisations and voluntary organisations was much higher than that of the younger students, and also higher than for older people in general. Furthermore, regular voting in elections was higher for the older learners than for older people in general, and much higher than among the younger students (or in the general population). Among the samples from both the universities, only about 60 per cent of the youngest graduates said that they voted regularly, compared with over 90 per cent of those aged more than 60 years. In general, the Birkbeck students appeared to be

more involved in activities outside the home than the OU students. The only exception was in membership of various religious organisations (although this attribute is for some less an ‘activity’ than a lifelong commitment and ‘identity’).

A high level of community involvement by older learners has been shown by previous studies. Kim and Merriam (2004), for example, identified considerable involvement in religious and volunteer activities, while Dench and Regan (2000) found that learners were more active than non-learners outside the family, as in voluntary work. The association raises the question of whether learning leads to greater community involvement, or the reverse. Dench and Regan concluded that the causal effects are bi-directional, which is supported by the present findings. The older Birkbeck and OU students were more actively involved in non-home activities and organisations at the start of their course, but when asked whether studying was likely to affect their involvement, small percentages reported that they planned to become members of associations (the percentages ranged from two to 15 per cent for the various activities, and were lower among the OU respondents). The questionnaire did not ask about involvement in other study or learning activities, but we know from previous research that many older students study at several places at one time, or participate in different types and levels of study over a period (Adshead and Jamieson 2001). So, why do older people study for a qualification, and what benefits do they perceive?

### **Reasons for study and outcomes**

The questionnaire collected information about the students’ reasons for enrolling on the courses, and about the outcomes and benefits, by asking them to select and weight several options. It is recognised that the reasons reported on a *post hoc* questionnaire may not accurately record the motivations at the time of entry, but nevertheless the findings suggest that people can and do distinguish between the main aims of their study and the sometimes additional benefits that they derive from the activity.

#### *Employment-related reasons and outcomes*

As expected, the older respondents listed employment-related reasons less frequently than the younger respondents (Table 5). ‘Changing job’ was an important reason for nearly one-half of those aged in the forties and for a considerable proportion of those aged in the fifties, particularly among the Birkbeck students. As reported by Davey (2002), higher education can be

TABLE 5. *Reasons for enrolling on programme of study, Birkbeck and The Open University students*

Reasons	Age groups (years)					
	51-60		61+		All	
	Bbk	OU	Bbk	OU	Bbk	OU
	<i>Percentages</i>					
To change type of work	33	24	9	4	51	47
To make work more satisfying	29	33	12	10	38	38
To get recognised qualification	61	80	41	67	71	88
To get on future course	36	35	28	18	41	42
Interested in subject	94	93	95	96	94	94
Personal development	84	88	66	78	84	90
To meet people	35	14	39	30	30	17

*Notes:* Percentages within age groups that stated the reason was 'very' or 'quite' strong. Bbk: Birkbeck. OU: Open University. The population or sample sizes were: Birkbeck 1,539, and The Open University 1,533.

TABLE 6. *Work and further study benefits reported by Birkbeck and Open University graduates*

Benefits	Age groups (years)							
	41-50		51-60		61+		Total	
	Bbk	OU	Bbk	OU	Bbk	OU	Bbk	OU
	<i>Percentages</i>							
New job	14	15	9	7	2	4	15	13
Job more satisfying	39	38	27	29	11	15	33	33
Recognised qualification	81	97	80	94	80	89	84	95
Progressed to further study	37	39	40	33	41	31	36	42

*Notes:* Percentages within age groups that stated the benefit 'very' or 'quite' strong.

important for those in mid-life who are concerned to stay in or to re-enter the labour market. It appears that many of the students aged in the fifties still nurtured the ambition to change their job, whereas among the older students, in so far as they gave employment-related reasons, they were more concerned with improving the quality of their existing employment.

The different emphasis was reflected in the reported outcomes. The most frequently reported employment benefit was improvement of current job situation or satisfaction, even among the older respondents (Table 6). Some of the 'younger-old' or 'mid-life' students reported that their study

TABLE 7. *Personal benefits for the oldest graduates by gender, Birkbeck and Open University students*

University and group	Personal benefits			
	Meet new people	Developed myself	Feel happier	More self-confident
<b>Birkbeck</b>	<i>Percentages</i>			
Women aged 61+ years	89	75	73	56
All women	82	86	67	70
Men aged 61+ years	67	65	63	31
All men	75	82	67	66
<b>Open University</b>				
Women aged 61+ years	70	85	75	75
All women	52	89	69	77
Men aged 61+ years	45	60	62	48
All men	49	82	61	67

had led to a change in their type of work. Furthermore, when asked specifically about current and future employment benefits, although the majority responded ‘not applicable’, nearly one-half of those aged in the fifties, and about one-fifth of those who were older, reported that it would ‘improve my ability to do my job better’ or had done so, and would ‘make my job more satisfying’. These findings raise questions about precisely how their study benefited their work. Was the subject knowledge important, or was it more to do with the generic skills that they acquired?

#### *Wider reasons and benefits*

It has generally been found by surveys of learners that the motivation and benefit that produces the strongest positive response is ‘interest in the subject’, and the present findings confirmed this pattern. The reason for study that attracted the second strongest affirmation was ‘personal development’ (Table 5). This motivation is often cited as important among older people, but it is not specific to older learners. Education is often presumed to be an important source of self-confidence for older people, but it did not stand out among the older students; indeed, the younger students more strongly affirmed this reason (Table 7). Furthermore it is interesting to note that women, and especially older women, generally reported a higher level of personal benefits than men. Putting aside ‘meeting new people’, the OU women students generally reported greater personal benefits than the Birkbeck respondents but, among the men, the differentials were less consistent. These differences may arise from

differences in initial self-confidence and in previous educational experience and learning skills. O'Dowd (2005) found that self-esteem formed in school had great influence on later engagement in education, more so than either father's educational background or the level of qualification on leaving school. It is therefore likely that many older people who enrol onto a study programme are already relatively confident.

The social benefits of study are often claimed to be an important reason why older people attend classes, but one study found that 'meeting new people' and 'having a good time' was more important for young full-time students (80–90%) than for part-time students (Callender 1997). Among the OU and Birkbeck respondents, less than one-third agreed that 'meeting people' was a reason for their study: among the older Birkbeck students, the affirmation was higher but still from only a minority (39%). Not surprisingly, given the distance-learning mode, a lower percentage of OU respondents affirmed this reason for their studies (but the percentage among the older students was only a little lower than among the Birkbeck graduates). In terms of the reported benefits, many more respondents of all ages from both institutions reported having met new people or friends, with interesting age and gender differentials (Table 7). More women than men from both institutions agreed that they had made new friends through taking the courses, and while the affirmation was greatest among older women, the reverse age-association applied to men. In other words, the evidence supports what is known from other studies of older men and women, that women are more 'outgoing' and have more social relations than men. Further, it suggests that the gender difference is less pronounced among younger (or middle-aged) respondents, and that this is likely to be a cohort effect (and therefore will moderate as various gender-differentials decrease).

### **The significance of a qualification**

A large majority of the respondents saw the qualification as an important reason for enrolling; those from the OU more so than those from Birkbeck (Table 5). This reason was less important for the older students, but even so, over 40 per cent of the Birkbeck respondents and nearly 70 per cent of the OU respondents rated it as important. Among the oldest age group, there was no obvious association between level of qualification on entry and the importance of getting a qualification. Despite the relatively high level of qualification on entry, nearly one-half of the older Birkbeck students with postgraduate qualifications, and a substantial proportion of those with undergraduate degrees, responded that getting a qualification

was a reason for study. In all groups, however, there were respondents for whom obtaining a qualification was not important, particularly among those with the lowest previous qualifications. The dominant picture was again one of heterogeneity, confirming a frequently expressed but often ignored tenet of educational gerontology (*cf.* Findsen 2005). Kim and Merriam (2004) concluded that among well-qualified older learners, the main reason for study was to satisfy intellectual curiosity. Whilst this is undoubtedly an important reason, there were many and diverse motivations (and perceived benefits) among older learners.

For some, the qualification was important for its own sake, but for others, it was a means by which to progress to further study. The ambition to progress was not confined to the younger age groups, and indeed, 30–40 per cent of the older respondents reported having moved on to a further course (Table 6). The lower percentages applied to the OU students, which may be explained by the greater proportion that graduated with a degree, whereas most of the Birkbeck graduates had obtained a certificate or diploma and had probably not studied as long (although we do not have data on length of study). When asked whether they intended to engage in formal study in the future, over 70 per cent of the older Birkbeck graduates replied ‘definitely’, compared with just over 40 per cent of the older OU graduates. Not all students needed or sought a qualification in order to progress their learning.

Overall, the quantitative evidence provides clues as to why some older people complete a formal course of study leading to a qualification: first, some ‘mid-life’ students in their forties and fifties believed that their study would enhance their job prospects and work conditions. With employers still being reluctant to invest in the training of older workers, the educational sector has an important role, as Davey (2002) argued. Secondly, the great majority of older respondents, like the younger ones, affirmed that having received a recognised qualification was a personal benefit. Thirdly, the findings make clear that studying for qualifications should not be seen as separate from studying for other reasons. Indeed, the relations between the different expected and actual benefits are complex, and were hardly revealed by the questionnaire responses.

### *Meanings*

Some of the meanings attached by older learners to the accreditation aspect of their studies were revealed in our previous study (Adshead and Jamieson 2001). A few extracts from these earlier interviews exemplify the discourses and meanings that later-life students attach to a formal qualification. It became clear from all the interviews that the purposes and

benefits of study are multiple and complex. The first quotation features particular themes, but it is emphasised that no individual reported a single motivation or aim. One of the most prominent themes was the significance of *validation* by the student's peer group, whether family or friends. This was particularly important for those who had not followed a conventional route through the education system. As a 60-year-old retired woman put it:

I wanted to have something to do. I did not want to just flit about, being retired as it were, I did not see myself as retiring, I saw myself as going on to a new venture. ... I want to be stretched intellectually and fairly. ... I don't have a degree and I suppose I have collected various other qualifications along the way. ... it's validated my feeling that I could have done a degree ... all my family have degrees.

Others expressed similar sentiments, and a retired professional man in his mid-seventies (without a formal degree) very directly referred to the *competitive* aspect of his study:

I just want to have a degree – I want to prove that I can do it too ... more than that, I am basically lazy (and) need a regime. It gives me a plan of work, somebody to tell me what to do. ... I do actually enjoy essay writing. Education is the main centre of my life; I run my life in order to be able to take these courses. ... I will take the degree if I can, I shall take what is available ... after that a PhD, just to be able to say I have got it. I want to know: can I get it? Have I got that sort of brain?

He went on to explain that the business he worked in was extremely competitive, and said, 'I am extremely competitive, that is my attitude. I go into a sulk if I don't get a top mark in my essay'. The *fear of wasting time in retirement*, as expressed above, was a theme in many cases. Research has shown that one of the challenges of retirement is to replace the structure imposed by daily work commitments (Young and Schuller 1991). For many, engagement in regularly occurring activities, whether sports, leisure or education, helped to give their daily lives a structure. For the interview respondents, working towards a qualification made such a contribution. As a retired woman in her sixties said, 'I dread the coursework deadlines, but I need them to give me structure and to show mastery of the subject. ... It is a sort of masochistic pleasure'. A retired man in his sixties who studied for a Diploma in Archeology said, 'I am not interested in the qualification, but at the same time it is an objective. I need a tangible qualification as a marker. ... I like the feed-back I get from my coursework. ... I like a challenge when it is self-made.' These remarks have an interesting ambiguity; getting a qualification was not a reason for study but was an important objective. It provided a *goal*, a 'challenge' and a purpose for this respondent's life. Thus, studying for a qualification can



give structure and meaning, not only to the day or the week, but to *life*. Indeed, the respondent expressed the wish to continue studying in a structured way, *i.e.* for a qualification, but did not want to progress to study for a degree, because that would be ‘too much commitment of time for someone who does not expect to use a degree’.

It appeared that many of the older students shared a need to be ‘pulled up’ and challenged, even if it hurt, just as Brown (2005: 9) reported among a group of Open University interviewees who talked about ‘hard graft fun’. The woman quoted above talked about ‘masochistic pleasure’, also said directly that ‘it has to hurt’. Yet at the same time, the fact that this ‘hurt’ or challenge was ‘self-made’, *i.e.* a choice, came across as important in several interviews. Some expressed sympathy for young people, for whom they thought that examinations and assessment could be more stressful, because their future depended on the results.

Adult educators often deprecate the pressure to involve learners in assessment and exams, believing it to be stressful and unnecessary, but perhaps we under-estimate both the positive aspects of assessment and the resilience of some older students, and their determination to put themselves under moderate stress. Although the emotional consequences and impact on self-esteem of ‘failing’ should not be downplayed, some older students appear to see these risks as manageable. Indeed, rather than seeing ‘stress’ as a negative state, it is possible, as some research suggests, that under certain conditions, stress-inducing events can be stimulating and beneficial to the functioning and health of individuals (McEwen 2000; Muse, Harris and Field 2003). It is argued that for many of the older learners who have been studied, the stress-related activity (‘masochistic pleasure’) entailed in assessment for a qualification added a positive aspect to their lives, because they had chosen this, and, provided they receive adequate support, it was part of their strategy for *active ageing*.

Interviewees, when talking about their study, referred to their often passionate interest in the subject as the key reason for studying for a qualification. As one Birkbeck graduate put it, ‘Someone told me about the (degree) course, and it sounded really interesting’. When asked about the qualification, this respondent replied, ‘I needed the discipline and I wanted a high quality package’ to ensure that he would meet ‘like-minded people’ (*i.e.* bright and serious students) and receive good quality tuition. A degree course in a reputable university was seen to provide that. Another interviewee, who enrolled on a postgraduate course at 78 years-of-age, said that initially she had asked if she could attend the class without doing the coursework and exams, as she was keenly interested in learning about the subject but worried about not being able to meet the post-graduate level of assessment. Having been allowed to enroll on that basis,

however, she was gradually persuaded to undertake all the assessment work. She said:

I was hooked on the course from day one. If I hadn't done the coursework, I wouldn't have learned nearly as much. ... I enjoyed the freedom of the dissertation ... it made things more crystal clear. When I finished it, I couldn't come down for weeks and weeks. (I felt) a sense of loss. I still feel a sense of loss'. [When told that her dissertation had been awarded a 'distinction', she said], 'I was excited, and my daughter said I was a role model for the family.

These few quotes suggest that the aim to acquire a qualification and the assessment involved can be an important part of the study process. In their research on summer universities for seniors in England, Jarvis and Walker (1997: 7) concluded that the benefits to the older learners were 'in the process not the product'. Reflecting on the role of the qualifications in the learning activities of older students, it could be argued that the 'the product becomes the process' or, more accurately, an important element of the process.

## **Conclusions**

Part-time mature students are a sizable and growing minority of all higher education students. Compared with full-time students, they are heterogeneous in terms of age, social backgrounds and reasons for study. This study of graduates from the two largest UK university providers of courses for 'mature' part-time students has shown that middle-aged and older people are well represented. While they are a minority of those who obtain a formal qualification, and are normally referred to as 'older' learners, the assessment and accreditation aspects appeal to only a minority. Many more undertake studies without this element, although the opportunities to do so are dwindling (public funding of non-accredited or 'extra-mural' studies has ceased in the UK). Sadly, only those willing to undergo assessment qualify for government support. Whilst we need more research into the intrinsic benefits of learning and study, we still lack more than a superficial understanding of the motivations, benefits and costs for those who study for a qualification. The findings reported here are a first step in filling this gap.

The quantitative data showed that the students' reasons for study were complex and varied, but that it is possible to distinguish two groups. First, there were those for whom employment reasons and benefits were important. Policy makers ought to pay more attention to this 'segment of the market', as the population ages and the need to retain older workers becomes more urgent. There are signs of this in the UK, where recent

decisions by The Treasury have increased support for part-time students, though they are still relatively neglected. Second, there were mature students, most of them older people, for whom employment-related reasons were not the reason for study. Instead, they reported motivations that are well known from previous research. They variously reported an interest in the subject, a need for personal development, and that they wished to meet new people.

Whilst few in this group cited the qualification itself as an important reason for study, many reported that it was an important benefit, irrespective of whether they already had a university qualification. For some, university study was a second chance to make up for lost opportunities. One theme that emerged from the qualitative interviews was the drive to preserve or gain self-esteem through a socially-recognised and valued formal qualification. A qualification bore the signs of a new beginning, or the development of a new social identity, which could be crucial for their wellbeing in later life. This group is interesting in that their actions and expressions were at least superficially inconsistent with Atchley's (1993) continuity perspective on adjustment to old age – how far their formal studies constituted discontinuity is partly an empirical question and partly a matter of definition. Certainly, the evidence from this minority suggests that education systems do not merely reproduce existing inequalities, but can provide opportunities for some actively to change their life situation (this notion has been explored elsewhere for adults of different ages: see Davey and Jamieson 2003).

In contrast to this group, 'continuity' was more evident among the 'already qualified' students. Many in this group were professionals, for whom further study was a way of managing the transition into retirement and of constructing a meaningful 'third-age' life. They are not the target group for government educational policy, and some might argue that they have had their fair share of public resources, but only a few take advantage of subsidised university courses and their funding support is a minute element of education spending. One feature of adult education that was repeatedly emphasised by the participants was how much they learned from each other – this autodidactic contribution of older people should be more widely recognised. Finally, if the notion of lifelong learning is to be taken literally, then any age group should be eligible.

Irrespective of one's views about the public funding of university courses for older learners, there is no doubt that this form of study constituted a vital aspect of the participants' lives. Serious, advanced study was for many a kind of 'life project' after other goals had been achieved. In some cases, the study was clearly a mechanism by which to manage the transition into retirement. In other cases, the need emerged some time after retirement,

perhaps after a period of rest and scaling down. For some, it was a part or the beginning of a long-term strategy for educational involvement, whereas for others, taking a course was a time-limited stage, after which they moved on to other life projects.

From the perspective of gerontological theory, the findings illustrate the roles of both *structure* and *agency*. They suggest that class and educational differentials are likely to be continued, if not strengthened, in later life, lending some weight to the political economy or structural perspective on the underlying causes of variations in older people's circumstances (Walker 2005). But it has also been shown that there are minorities who 'buck the trend', and that therefore the macro-structural perspective has to be complemented by attention to intermediate attributes (*e.g.* family) as well as agency. Indeed, older learners who actively make choices can be seen as exemplars of third age 'consumers', to use Gilleard and Higgs's (2000) term. As argued succinctly by Hockey and James (2003), only by focusing on the dynamics of structure *and* agency can we raise our understanding of the variety of experiences in later life and of the ways in which people add meaning to the different stages of their later lives. Education is one such way. More work is needed to illuminate its uses and meanings in mid- and later-life (which will be pursued in the next stage of this research).<sup>6</sup>

## NOTES

- 1 See, for example, the classic work of McClusky (1974), which has been critically reviewed by Hiemstra (1981, 2002), also the research on involvement in the University of the Third Age (Swindell 1993), and that by Purdie and Boulton-Lewis (2003).
- 2 The second wave, underway in 2006, involves life-history interviews with a sub-sample that is exploring their study experiences and outcomes. The third wave, during 2006–07, will be a follow-up questionnaire survey of the long-term benefits (and costs) of study that will explore issues arising from the first and second parts of the study, and will be administered to Birkbeck as well as Open University graduates.
- 3 The Open University data were collected under the direction of Alan Woodley.
- 4 Established in 1823, Birkbeck College became a School of the University of London in 1920. It is a self-governing institution incorporated under Royal Charter but remains a college of the University of London and continues to award University of London degrees. In 2002, it dropped the word College to become named simply Birkbeck, University of London (from <http://www.bbk.ac.uk/bbk/history/>).
- 5 A 'wireless university' had been proposed by a British educationalist as early as 1926, and by many thereafter, but 'The Open University' was created by the government during the late 1960s. The first students registered in 1970, and by 1980 there were 70,000, and some 6,000 people graduated each year. The 200,000th student graduated in 1998. Today more than 180,000 students interact with the OU online from home (from <http://www.open.ac.uk/about/ou/p3.shtml>).
- 6 Biographical interviews with Birkbeck graduates are planned, as well as further analysis of the qualitative interview data, to throw more light on how studying relate

to other areas of individuals' lives, what other study activities, formal and informal they are involved in, what pathways are taken between educational institutions, and the impact of age on their choices. The three-year follow-up postal survey of Birkbeck and OU respondents will explore further how studying is linked to benefits and whether they change over time.

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