

# Post 18 Choice of Part-Time Study

Research report

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## Executive Summary

- Approximately a third of the general population was found to be 'prospective learners' (PLs) – i.e. to have considered or started studying for a new qualification in the previous five years. A fifth of the general population was found to have considered *and* started studying. These figures should be treated with caution as they are higher than expected.
- Looking at the socio-demographic characteristics of PLs, these were more numerous among: females; young people (with a peak among 25-34 year-olds); those with caring responsibilities; those in employment; people with higher current household incomes; and those who had a parent or partner with a degree.
- In terms of course characteristics, the majority of PLs considered or started studying:
  - for a Level 3 qualification (although sizeable proportions considered higher qualifications);
  - practical / vocational rather than 'academic' subjects;
  - at a university/HEI or a FE college compared to other providers;
  - part-time (over two-thirds of respondents), with the proportion of PLs who considered or started studying part-time being higher among older people; and
  - on courses they expected to finish within two years.
- Over three-quarters of PLs said they were motivated to consider studying for professional reasons. The proportion of those who considered or started studying for professional reasons was found to be higher among those in employment; younger people; and women. PLs motivated by professional reasons were also more likely to: have started studying; expect to complete their studies in less than one year; consider / study on more vocational courses; and study for Level 4 or Level 5 'sub-degree' qualifications.
- Professional motivations meant different things to different people. Although the highest proportion of PLs indicated that they wanted to progress in their current jobs, sizeable proportions said they wanted to get a new job, change career and/or were hoping for a pay rise. Progressing in one's current career was more prevalent among men, those aged 35-54, and those with the highest incomes. Career changes were more prevalent among women and those with 'middle' incomes.
- The distinction between professional, educational and personal motivations for studying was not always clear-cut. Almost half of survey respondents and many interviewees indicated that these motivations were all important and often inter-linked when considering studying.

- For most considering part-time or both part-time and full-time education, the *main* motivation for studying part-time was work-related: they wanted to combine study and work (30 per cent) or could not afford not to work (24 per cent). Following this, prospective part-time students were most likely to cite other forms of study / life balance: wanting to combine study with domestic / caring responsibilities (14 per cent) or part-time learning offering 'greater flexibility / convenience' (12 per cent).
- Qualitative interview findings additionally showed that, irrespective of how long one has been considering studying, the decision to start could be triggered by external events and circumstances, such as job loss or contractual changes, employer sponsoring, or the lifting of caring responsibilities.
- The main aspects identified by PLs as having undermined or prevented their take-up of studies included:
  - all types of study costs (i.e. course fees; living costs; and the costs of equipment and travel related to study). Those considering studying in an HEI were more likely to consider tuition fees and the costs of equipment, books and travel an obstacle than those considering studying in any other institution. People with lower household income were more likely to consider equipment costs an obstacle, although this result should be treated with caution as the likelihood to see this as a barrier did not increase linearly with household income nor is income equivalised. Younger people were more likely to view living costs as a barrier. At the same time, unlike the population as a whole, PLs aged 18-24 tended to see the availability of both formal and informal financial support as having been an enabler.
  - The amount of time required to study. People considering or starting to study for higher education qualifications were more likely to consider the time required a barrier to studying. The youngest and oldest prospective learners were less likely to consider time-based factors a barrier.
  - The balance with work commitments.
- The main aspects identified by PLs as having facilitated or enabled their take-up of studies included:
  - the match between available courses and the respondent's interests;
  - the flexibility and location of the course, although people with caring responsibilities were less likely to consider these aspects to have been an enabling factor;
  - the availability of information about the course and the application process.

- As expected, PLs who had started studying were more likely than those who had only considered studying to see most of these factors as having been an enabler and less likely to see them as having been a barrier.
- Men were consistently less likely to have experienced each factor as an obstacle. However, PLs who were women were more likely to start studying.
- Around 60 per cent of PLs agreed that they would benefit financially from studying.
- Yet, study costs – in particular tuition fees – were the main obstacle to studying. Around four out of 10 PLs indicated that study costs were an obstacle to their take-up of post-18 education.
- There is great variation in the amount of tuition fees paid by PLs and in their funding arrangements. Slightly more than half of PLs intended to get financial support to cover some or all of the tuition fees. PLs from lower income groups were less likely to plan to pay the fees entirely themselves and more likely not to know how they would pay for their tuition fees. The most cited sources of support for tuition fees were the Student Loans Company, employers and the government.
- Two-thirds of PLs knew about student loans to cover tuition fees, yet only 17 per cent applied for one. Fifty-two percent of survey respondents knew about loans to cover living expenses but only 10 per cent applied for one. The main reasons cited for not applying for a loan were not needing one; knowing that the applicant would not qualify; and fear of becoming over-indebted. Many interviewees also cited the fear of over-indebtedness, as well as raising the problems of: lack of clear, comprehensive and easily accessible information; and student loans being incompatible with other welfare benefits.
- PLs who knew their employer would support them financially were more likely than others to start studying. Interview findings confirmed that employer financial support was a decisive enabling and motivating factor in starting to study for a new qualification. However, four in 10 PLs did not know whether their employer would cover some or part of their tuition fees.
- Forty-four per cent of PLs agreed that existing financial support mechanisms were inadequate for people like them. People from low-income households and younger people were more likely to find these mechanisms inadequate.
- Overall, the enabling effect of information about curriculum and career options on study plans and the take-up of studies was rather moderate. The main sources of information for survey respondents were family and friends, employers, colleagues and university services (for financial advice specifically). Interview respondents cited the web as the main source of information but also mentioned family and friends, employers and

colleagues as trusted sources of information. High proportions of PLs did not seek career advice (two-thirds) or financial advice (eight out of 10 PLs).

- Interviewees regarded the quality / relevance of information as sub-optimal rather than its volume. This was especially the case among those with special circumstances, including health conditions and/or caring responsibilities. A smaller proportion (27 per cent vs 39 per cent disagreeing) of survey respondents agreed that they needed *more* information. Younger learners, learners considering or starting lower qualifications, those considering or starting full-time education and those who had not started studying at the time of the survey were more likely to need extra advice.
- Over a third of PLs agreed that combining work and studies had been an obstacle to them entering education. PLs perceived employer support in combining the two as an important enabler. Many survey respondents did not know, however, what kind of support they could expect from their employer. PLs saw flexible hours as the most likely form of support (assumed or real) while getting paid time off to study the least likely. The more closely aligned the qualification considered with the respondent's existing job, the more likely they knew they could get paid time off, unpaid time off and flexible working hours.
- Nearly half of PLs and two-thirds of those with caring responsibilities of 10 hours or more per week agreed that family commitments made them think twice when considering studying for a new qualification. People with caring responsibilities were also more likely to consider balancing studying with family responsibilities / support to have been a barrier. Family commitments limit the time that PLs can spend studying but also their mobility. On the other hand, most interviewees appreciated the practical support received from family members with caring responsibilities (e.g. dropping / picking up children at / from school) and household chores.
- PLs saw flexibility as a key enabler. Interview participants defined flexibility as the ability to: study in their own time; study at their own pace; get contact time with their teachers outside of regular hours; study remotely; and break courses up and learn in a modular fashion, accumulating credits and re-starting where one had stopped after a period of break.
- Overall, PLs primarily selected their education provider based on the facility of access, followed by course content and the reputation of the provider.
- Interview participants with a physical and/or mental health condition identified facility of access as a key issue when considering studying, which included the lack of easily accessible information around practical aspects and support available and a dearth of funding and support.

- Most PLs felt the location of their provider made it easier for them to study, but some felt it made it harder. There is some evidence that this is particularly the case for those in more remote locations.
- Interview participants who would otherwise have difficulty accessing education locally particularly valued the flexibility afforded by online and distance learning. However, some participants expressed a preference for face-to-face education, or having some in-person contact when needed. Interview participants additionally noted that some qualifications require face-to-face training or assessment, and some expressed a concern that some employers do not give the same credibility to online or distance courses.

# 1. Introduction

## 1.1. Background

### 1.1.1. Policy background

Part-time and mature students are central to skills provision, to the national skills strategy, and for the reskilling and upskilling of the existing workforce. Learning through life and part-time study are promoted by the OECD<sup>1</sup> and others because they help transform lives, drive economies by providing the skills required in the labour market, and enhance a country's competitiveness and economic strength. Combining prior work experience and part or full-time study can help to increase the supply of skilled workers widely sought by employers.

Part-time provision and work-based learning are significant for the tertiary sector too. They can contribute to a more flexible, diverse post-18 sector offer, which is especially important for mature students with existing employment and/or domestic responsibilities. They enable students to fit their studies around these commitments.<sup>2</sup> Such flexible provision can offer individuals more choices about how and when to study. It can also provide value for money for those in employment by minimising absence from work, with individuals investing their own time in study, which is work-related<sup>3</sup>. This mode of skills development is important too for broadening access to HE and creating greater social mobility, all of which enhance social justice. More flexible and diverse HE provision and models of learning such as part-time and workplace-based courses can help those who have previously found it difficult to access HE to improve their skills.

Despite these and many other benefits to part-time education and mature entry,<sup>4</sup> the number of part-time English domiciled undergraduate entrants to UK universities and FE colleges in England has declined every year since 2007/08. The falls were particularly dramatic following the 2012/13 reforms of student

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<sup>1</sup> OECD (2017) *Getting Skills Right: United Kingdom*. Paris: OECD

<sup>2</sup> Callender, C., Hopkin, R., and Wilkinson D. (2010) *Futuretrack: part-time students career decision-making and career development of part-time HE students*. Manchester: Higher Education Career Services Unit  
[http://www.hecsu.ac.uk/careers\\_decisionmaking\\_and%20\\_career\\_development\\_of\\_parttime\\_he\\_students.htm](http://www.hecsu.ac.uk/careers_decisionmaking_and%20_career_development_of_parttime_he_students.htm) Accessed 14 December 2010

<sup>3</sup> Mason, G. and Hopkin, R. (2011). *Employer Perspectives on Part-time Students in UK Higher Education*, Research Paper No. 27. London: Department for Business, Innovation and Skills and the Higher Education Careers Services Unit.

<sup>4</sup> Callender, C., and Little, B. (2015) The hidden benefits of part-time higher education study to working practices: is there a case for making them more visible? *Journal of Education and Work*, 28:3, 250-272; Bennion, A., Scesa, A. and Williams, R. (2011) The benefits of part-time study and UK higher education policy. *Higher Education Quarterly*, 65:2, 145 – 163;

funding which increased tuition fees and introduced income contingent loans to cover part-time students' fees for the first time.

### 1.1.2. Research background

Research in this field indicates there are numerous explanations for this decline. These include:

- Financial aspects of course take-up, most prominently: student loan eligibility criteria; mature students' willingness to take out student loans; the ending of funding from the Higher Education Funding Council for England (HEFCE) for most graduates taking a second degree; and a 'one size fits all' approach to policy that ignores the characteristics of part-time students;
- Macro-economic factors, including: the 2007-2009 economic recession; unemployment rates; and wage levels affecting both PLs' willingness to study and employers' willingness to fund their employees;
- Supply factors, such as shifting of provision from part-time (PT) to more profitable full-time (FT), with education providers' income from part-time provision falling behind income from full-time provision. The lifting of the cap on student numbers in 2015 possibly exacerbated this.<sup>5</sup>

Other, now dated, research highlights mature students' motivations for study and the barriers they face in entering part-time education. The consensus in the existing literature suggests that mature students engage in further studies primarily for extrinsic reasons - to enhance their employment and career prospects through improving their qualifications. However, enjoyment and wanting a change in their life are deemed important too, alongside other intrinsic factors such as intellectual stimulation and for women with children, to be a role model for their children or to help with their children's education<sup>6</sup>. Employment issues can constitute both a pull factor (pulling towards a change of career or occupation) and a push factor (away from dissatisfaction with

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<sup>5</sup>Butcher, J. (2015) *'Shoe-Horned And Sidelined'? Challenges For Part-Time Learners In The New HE Landscape*. York: Higher Education Academy; HEFCE (2014) *Pressure from all sides: Economic and policy influences on part-time higher education*, HEFCE Report 2014/8d. Bristol: Higher Education Funding Council for England <http://www.hefce.ac.uk/pubs/year/2014/201408d/> Accessed 27/11/2017; Oxford Economics, (2014) *Macroeconomic influences on the demand for part-time higher education in the UK*, Report to HEFCE. Bristol: Higher Education Funding Council for England; Callender, C. (2013) *Part-Time Undergraduate Student Funding and Financial Support*, chapter in *'Browne and beyond: Modernizing English Higher Education'* edited by Callender, C and Scott P, London: Bedford Papers, 130-158.

<sup>6</sup>Callender, C. (2018) *Student mothers in higher education*. In P.J. Burke, A. Hayton and J. Stevenson (eds) *Evaluating Equity and Widening Participation in Higher Education*. London: Trentham Books, pp 88-110; Butcher (2015) op cit; Callender et al (2010) op cit;

current and/or previous job)<sup>7</sup>. Not all of these studies, however, distinguish between mature students' motivations to study and their reasons for wanting to study part-time. Those that do, posit that part-time students opt for part-time rather than full-time study because they could not afford to give up their job, needed the greater flexibility and convenience afforded by a part-time course, and/or wanted to combine study and work<sup>8</sup>.

Few studies, however, have addressed these issues among PLs. Relatively recent research that has done so has drawn attention to the range of factors affecting both demand for and supply of part-time study provision.

- On the demand side: the economic climate and the subdued labour market; financial support to part-time students; fee levels; occupational regulation; and negative attitudes to part-time study among young people.
- On the supply side: control limits; market regulation; availability of higher vocational qualifications; state subsidies for part-time provision<sup>9</sup>.

This research additionally confirms the above outlined explanations for the decline in part-time post-18 education entrants over the past decade.

A Universities UK (UUK) report published in October 2018<sup>10</sup>, focusing on those who have considered entering part-time education but have decided against, has further shed light on the reasons why 'lost learners' decide not to start studying. According to this research, these reasons have mainly to do with financial concerns, with the cost of tuition fees cited by 44 per cent of respondents and the cost of living by 42 per cent, and with concerns that studying would not fit in with their lives, cited by 35 per cent of respondents. This study also points to the considerable impact that the 2012 reforms in England have had on part-time HE, with 43 per cent of respondents stating they would have entered education if one or more of the reforms had not happened.

The influence of the 2012 reforms on part-time HE participation, as well as of falls in employment and employer funding, has also been stressed by a recent study looking specifically into the role of such reforms. In line with UUK (2018)

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<sup>7</sup> Davies, P., Osborne, M. and Williams, J. (2002) *For me or not for me? That is the question. A study of mature students' decision-making and higher education*. DfES Research Report 297 DfEE.

<sup>8</sup> Callender et al (2010) op cit.

<sup>9</sup> Pollard, E., Newton, B., and Hillage, J. (2012) *Expanding and Improving Part-time Higher Education*. Research paper number 68. London: Department for Business, Innovation and Skills.

<sup>10</sup> Universities UK (2018) *Lost Learners*. London: UUK.

figures, this study found that approximately 40 per cent of the decline in part-time study could be attributed to the fee changes<sup>11</sup>.

Since most studies on this topic were undertaken, however, there have been considerable changes in the policy landscape so it is open to question how relevant these findings are for understanding prospective part-time and mature students' behaviours, choices and decision-making, as well as for policy makers. It is therefore clear that further research is required to understand the factors behind PLs' decision-making, what the impact might be for the FE sector and how future policy can be designed to increase the number of applications from mature and part-time students.

## 1.2. Definitions

This study used the following definitions:

- Prospective learners (PLs): anyone aged 18-21 who has considered studying part-time and anyone aged 21 plus who has considered studying either part-time or full-time, for a qualification ranging from Level 3 (A-levels or equivalent) to Level 6 (degree level or equivalent) over the last five years<sup>12</sup>. These include those who are currently considering (re)entering education; those who have done so but decided not to enter; and those who have started studying. Respondents were identified as 'considering' studying if they had taken specific steps<sup>13</sup>.

**Table 1: Population in scope of research**

	Full-time students	Part-time students
18+	NO	YES
21+	YES	YES

- PLs can further be distinguished between:

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<sup>11</sup> Callender, C. and Thompson, J (2018) *The lost part-timers. The decline of part-time undergraduate higher education in England*. London: The Sutton Trust.

<sup>12</sup> There was no cut-off point or threshold in terms of age. For example, a 19-year old respondent would have been asked to recall whether they considered going into higher/further education over the past year.

<sup>13</sup> These are: obtaining information on courses (online or from other sources); obtaining information about an education provider (online or from other sources); seeking advice from friends, relatives, employers, career advisors, teacher, or education providers/specialists; attending an open day or fair; and applying for a course.

- PLs who only considered studying / entering education: those who are either currently considering studying for a qualification or have done so over the past 5 years but have not started; and
- PLs who started studying / entered education.
- Mature learners: those aged 21 and over. There was no maximum age to participate in the study.

**Figure 1: Project design and definition of target population**



### 1.3. Objectives

The overarching aim of this research was to assess the level of demand for education within the population, particularly from prospective PT and/or mature students, including how they made choices about qualifications and levels, and the barriers and enablers, which informed those decisions.

### 1.4. Research questions

The research aimed to answer the following questions:

1. What proportion of the adult population have considered, are currently considering, or may consider, entering some form of education? What demographic characteristics do PLs have compared to those who are not considering any form of education?
2. When making decisions, what are the overarching aims / goals of 'PLs'?
3. What barriers do PLs face when choosing whether to enter education? What enablers / facilitators are available that assist with the choice of whether to enter education and of what qualifications / level of education to choose?
4. To what extent did PLs consider the cost of study as an enabler or a barrier? What financial support did they consider?
5. How do PLs make their choices about whether, how (e.g. full-time or part-time / long distance / accelerated / other modes of learning) and

where to study? What research do they do, and which sources of information do they use?

6. To what extent did PLs consider personal circumstances / competing responsibilities a barrier?
7. What other barriers did they face? Do existing provisions meet the need of PLs?

## 1.5. Report outline

The report is structured to answer each of the research questions specified above. The reporting outline is as follows:

- Chapter 2 provides a detailed account of the research methodology adopted in this study;
- Chapter 3 addresses Research Question 1 by examining the study plans for British adults and more specifically, the study plans and considerations of PLs who considered or started studying over the last five years;
- Chapter 4 addresses Research Question 2 by exploring PLs goals and motives for studying;
- Chapter 5 addresses Research Question 3 by providing an overview of the different factors that act as enablers and/or barriers to enter education;
- Chapter 6 addresses Research Question 4 by examining the cost of study as an enabler or a barrier in deciding to enter education;
- Chapter 7 draws on information from the survey on curriculum, careers and funding, and supporting information from interviews to address Research Questions 5;
- Chapter 8 addresses Research Questions 6 with sub group analysis into those with work commitments and those with family commitments. It explores specific problems encountered by these groups and possible solutions to allow them to enter post-18 education;
- Chapter 9 addresses Research Question 7. It explores the perceived alignment between supply and demand, regional variations, accessibility for disabled learners and demand for online learning.

The final concluding chapter draws on the key findings of the study.

## **2. Methodology**

### **2.1. Approach overview**

This research adopted a mixed-methods approach, which combined two surveys and follow-up in-depth telephone interviews.

The survey content included a short 'screening' questionnaire to identify and profile the population of interest, followed by a more extensive questionnaire on participants' experiences of considering starting studying for those screened in.

Follow-up telephone interviews ensured a depth of inquiry, which could not be obtained through the survey alone. They provided a nuanced, rich understanding of the multiple factors and processes that shape and explain access, and participation of post-18 part-time and mature students from different backgrounds.

### **2.2. Quantitative strand**

#### **2.2.1. Methodology**

The quantitative strand involved two surveys, a survey of the general population and a survey of PLs.

##### **General Population survey**

Firstly, to understand the extent to which the post-18 population in Great Britain were or were not considering studying, a survey was conducted with the adult (18+) population. A total of 6,128 surveys were completed across three waves of the Populus Live Panel's online omnibus run from 10<sup>th</sup> to 16<sup>th</sup> August 2018. To keep the sample representative of the general population, standard quotas and calibration weights were employed based on demographic characteristics.

This questionnaire included a set of questions to identify PLs and demographic questions to allow us to estimate the proportion of the population that had considered studying in the last five years, and how that varied by different demographic groups.

##### **Prospective Learners survey**

Following the general population survey, a survey of PLs was conducted. As well as including the same content as the general population survey, this questionnaire looked in more depth at participants' experiences when considering studying, for example what support was available to them and what motivated them to consider studying.

A total of 985 surveys were completed, with interviews conducted with ‘PLs’ using a sample recruited from the Populus Live Panel. Fieldwork ran from 27<sup>th</sup> August to 4<sup>th</sup> September 2018. As no sampling frame exists for this population, quotas were set on sex, age, highest level of education, and whether the respondent started, or just considered, studying using weighted estimates from the general population survey. These variables were also used in calibration weights, alongside household structure, employment status, household income, and region.

When interpreting any sub-group analysis of ‘PLs’, it should be noted that this population is itself a sub-group of, and therefore different to, the general adult population. As a result, differences between groups may be muted. For example, in the general population, young people may have very different study plans to older people. However, young PLs may appear much more similar to older PLs in their study plans.

## **2.2.2. Sampling and measurement error**

### **Sampling error**

All surveys that use a sample of a population are subject to sampling error – that the people selected to take part are unlike the population as a whole. The sample for this study was drawn from a non-probability opt-in web panel. This means that, unlike probability-based samples, the people taking part in the survey are likely to be systematically different from the population. For example, they will all be internet users, a group who are relatively older and more likely to have achieved higher qualifications than those who are not internet users. While quotas have been used to minimise the impact of this on the results, underlying biases may persist and affect survey estimates.

### **Measurement error**

A key challenge of this study was to ensure that survey participants had the same understanding of what it means to “consider studying” or “to have considered studying in the past five years” as intended by the research team. For many people, “considering studying” is a slow and intermittent cognitive process, not necessarily a conscious decision that can be dated. Thus, this study had a particular risk of measurement error.

This risk was addressed in two ways. First, participants were presented with a list of behaviours that demonstrate an active interest in learning (e.g. looking for information about study programmes and funding online<sup>14</sup>). Second, a number

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<sup>14</sup> See Section 1.2 for details of what was classified as ‘considering’ studying

of validation checks were put in place throughout the questionnaire to ensure that participants' responses were consistent.

### 2.3. Qualitative strand

For the qualitative strand of this research, 25 follow-up in-depth interviews were conducted with participants of the boost survey who expressed an interest in taking part. In line with the objectives of the study, we started by filtering out: people who did not opt in; people who were not domiciled in England; people aged 61+; people who were studying /considering studying for purely personal development reasons; and people who refused (or didn't know how) to answer key questions about study plans and background characteristics. Potential participants were then selected with the intent to achieve a sample which included a good mix of experiences and perspectives.

Given the time constraints of this study, recruitment was largely done on a 'first come first served' basis. This meant in particular that we were able to recruit fewer participants studying / considering full-time education as well as participants with caring responsibilities than we had initially hoped.

The final sample comprised the following:

- Age: all participants but one were aged 21 or more, with a good spread across ages
- Gender: 11 males and 14 females;
- Highest qualification attained: 11 up to secondary level; 14 degree level and above
- Current employment status: 13 in full-time employment; eight in part-time employment; two house persons; one not in employment; one student
- Whether studying / considering part-time or full-time: 22 part-time; three full-time
- Whether only considered or started studying (sum is higher than 25 as some participants had already completed a course over the past five years and were currently considering studying for another qualification): 17 only considering; 13 started
- Provider used / considered (sum is higher than 25 as some participants used / considered more than one provider at the same time): 12 HE; eight FE college; four private provider; four LA provider; two employer / apprenticeship
- Caring responsibilities (children or other): 10 with caring responsibilities; 15 without caring responsibilities

- Whether parents, partner or children have attained a university degree (sum is higher than 25 as these could overlap): four mothers; three fathers; seven partners; four children; 12 none of these.

## **2.4. Reporting conventions**

The analysis and this report applied the following conventions:

### **2.4.1. Rounding**

To improve readability, and because differences smaller than one percentage point will not be meaningful, percentages are presented to zero decimal points. As a result, figures may not sum to 100 per cent.

### **2.4.2. Bases**

All reported base sizes (i.e. the number of cases on which the analysis is based) are unweighted and exclude those who refused to answer or selected the option 'Don't Know'. Small sample sizes reduce the reliability of estimates, and it is indicated where results should be treated with caution. Figures based on a sample size of 25-50 cases are marked with an asterisk. Figures based on a sample size of less than 25 are not presented.

### **2.4.3. Significance testing**

All findings have been tested for statistical significance, and all differences reported are statistically significant unless stated otherwise. Statistical testing was conducted at the 95 per cent confidence level.

Most statistical tests assume random sampling, because a random sample is likely to be representative of the sampled population. However, the data collected for this study is from participants recruited from a non-probability sample. For the analysis used in this report, the assumption has been made that the weighted sample is representative of the population, and statistical tests can be run as for a simple random sample.

### **2.4.4. Percentages**

Some tables and figures in the report relate to questions with mutually exclusive responses. In these tables, percentages will generally sum to 100; however, some percentages will not sum exactly to 100 per cent because of rounding. In addition, percentages will not sum to 100 per cent for questions where participants could choose multiple responses.

#### **2.4.5. Integration of quantitative and qualitative results**

In the interests of readability and conciseness, this report sometimes alternates between survey and interview results. All transitions from qualitative to quantitative research are flagged. In addition, 'survey respondents' or 'surveyees' are used to refer to participants to the quantitative strand of the study; and 'interviewees' are used to refer to participants to the qualitative strand of the study.

### **3. Study plans of British adults**

This chapter addresses Research Question 1: What proportion of the post-18 population have considered entering some form of education or have started studying? What demographic characteristics do PLs have compared to those who are not considering any form of education?

In the interests of clarity, the survey estimates included in Section 3.1 use data from the general population, while the estimates included in Sections 3.2 and 3.3 use data from the 'boost' survey of prospective learners.

#### **3.1. Incidence and profile of prospective learners**

This section focuses on the British adult population.

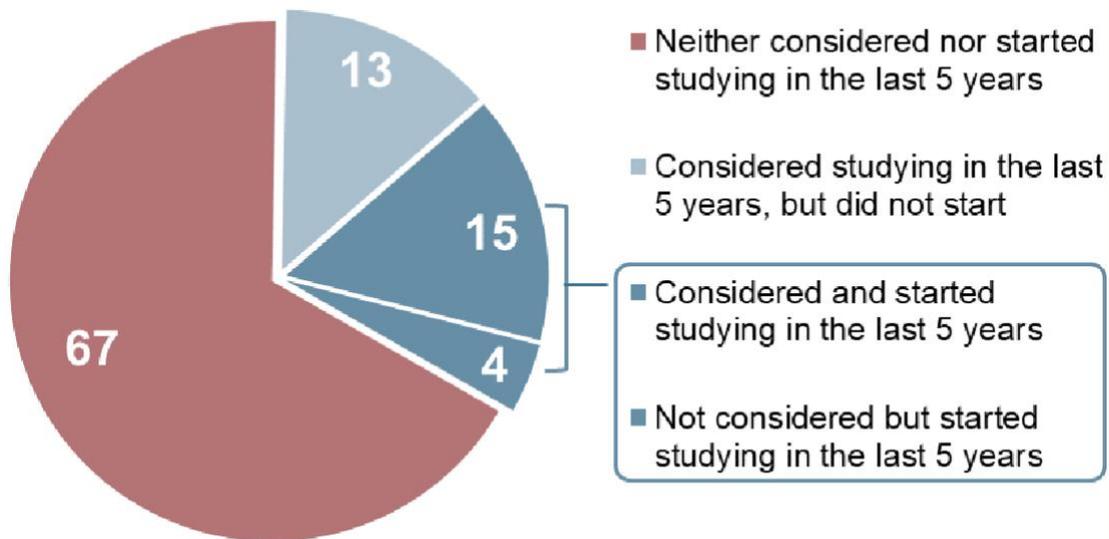
##### **3.1.1. Incidence**

One third of the general population reported having considered or started studying for a new qualification in the previous five years, i.e. were 'PLs' (Figure 2). This includes both those who considered studying but did not start (13 per cent of the general population) and those who actually started (20 per cent of the general population)<sup>15</sup>.

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<sup>15</sup> Four per cent of the general population had not considered studying in the previous five years, but had started a course. For this report these people are grouped with those who both considered and started studying within the last five years as those who 'started studying'.

**Figure 2: Proportion (%) of the general population that had considered or started studying for a new qualification in the last 5 years**



Base: British population aged 18+ (6,128)

These figures were substantially higher than anticipated by the research team. There are no equivalent benchmark figures for this population, but using Higher Education Statistics Agency (HESA) 2016/17 statistics as a point of reference, there were just over 1.1 million part-time students or students aged 21 or older studying in an English Higher Education Institution (HEI), or approximately two per cent of the population of England.

The scale of this difference would suggest the figures should be treated with caution. As outlined in Section 2.2.2, survey data are subject to measurement and sampling error: it is possible that the notion of ‘considering studying’ had a different meaning for the research team and for respondents. In addition, there is a risk that the sample used for this survey might not be entirely representative of the wider British population. In particular, it is not a stretch to consider that people who have the time or inclination to take part in opt-in panel surveys may also be the types of people more likely to consider or enter post-18 education.

However, the target population for this study is larger than that covered by the HESA statistics, including those studying outside HEIs, and people who have started studying within the last five years rather than those who are studying in a particular year. It is therefore possible that the true figure is genuinely much larger, and so this estimate should not be discounted.

It should also be noted that the UUK’s Lost Learners Study also found a high incidence rate amongst the population for those considering part-time study. Though their selection criteria was different, the high incidence rate by both the

UUK and here does suggest that there is a not insubstantial number of individuals within the population who are interested in part-time and/or mature study<sup>16</sup>.

### 3.1.2. Demographic characteristics

The proportion of the general population that considered or started studying for a new qualification in the previous five years varied by:

- Employment status: Those who were in employment were more likely to be PLs, and to have started studying, than those not in employment.
- Household income: Those with higher incomes were more likely to be PLs than those with lower incomes, and to have started studying, than those with lower incomes (Figure 5)<sup>17</sup>.
- Gender: women were more likely to be PLs than men (Figure 3).
- Age group: The proportion of PLs increased as age categories increase up until the 25-34 year-old category (61 per cent), before decreasing for subsequent age categories<sup>18</sup>. People aged 25-34 were also more likely to have *started* studying in the previous five years than the rest of the population (Figure 4).
- Caring responsibilities: People with children aged under 18 were more likely to have considered or started studying than those without dependent children (51 per cent compared to 27 per cent). Amongst those with children, those with younger children aged 18 or under were more likely to be PLs than those with older children (Table 2). Similarly, those with other caring responsibilities (outside of children) were more likely to have considered or started studying than those without (41 per cent compared to 31 per cent). This feels counter-intuitive, as it might be expected that people with caring responsibilities would have less time to consider or start studying for a qualification.
- The level of education of close relatives: Those who had at least one parent, a child, or a partner with a degree were more likely to have considered or started studying in the previous five years (40 per cent), and to have started studying (26 per cent), than those who do not have a parent, child or partner with a degree (30 per cent and 17 per cent respectively) (Figure 6). Those with parents or partners with a degree

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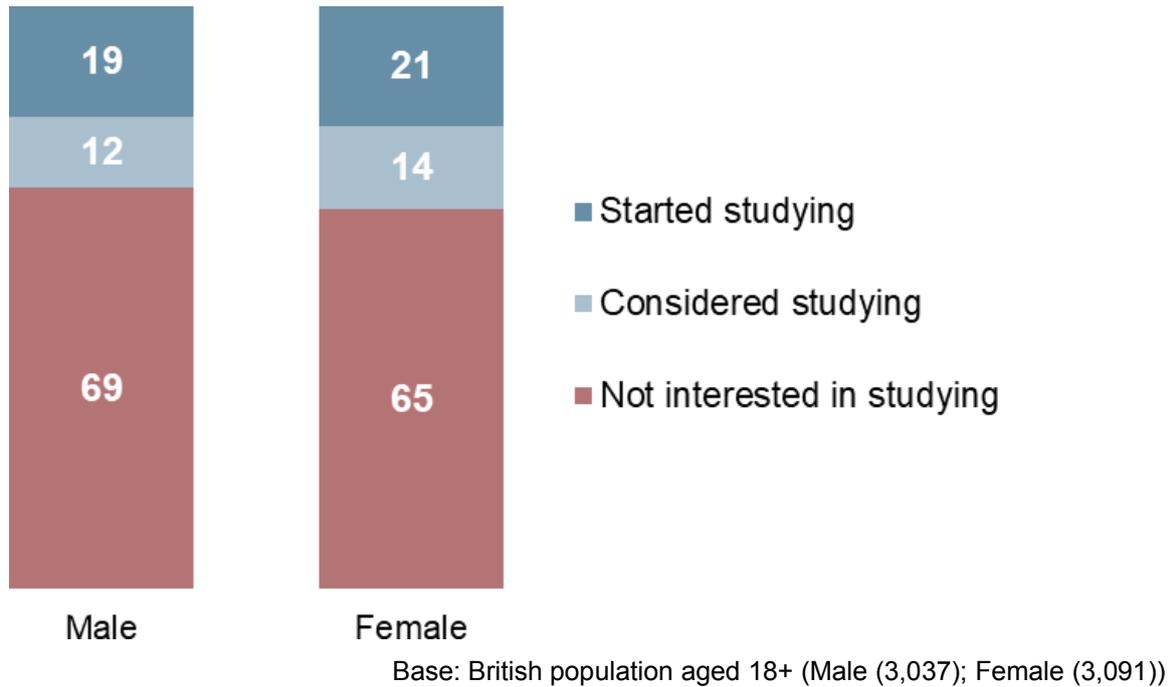
<sup>16</sup> Universities UK (2018) op cit.

<sup>17</sup> Note that these are un-equivalised household incomes, so do not account for different household structures

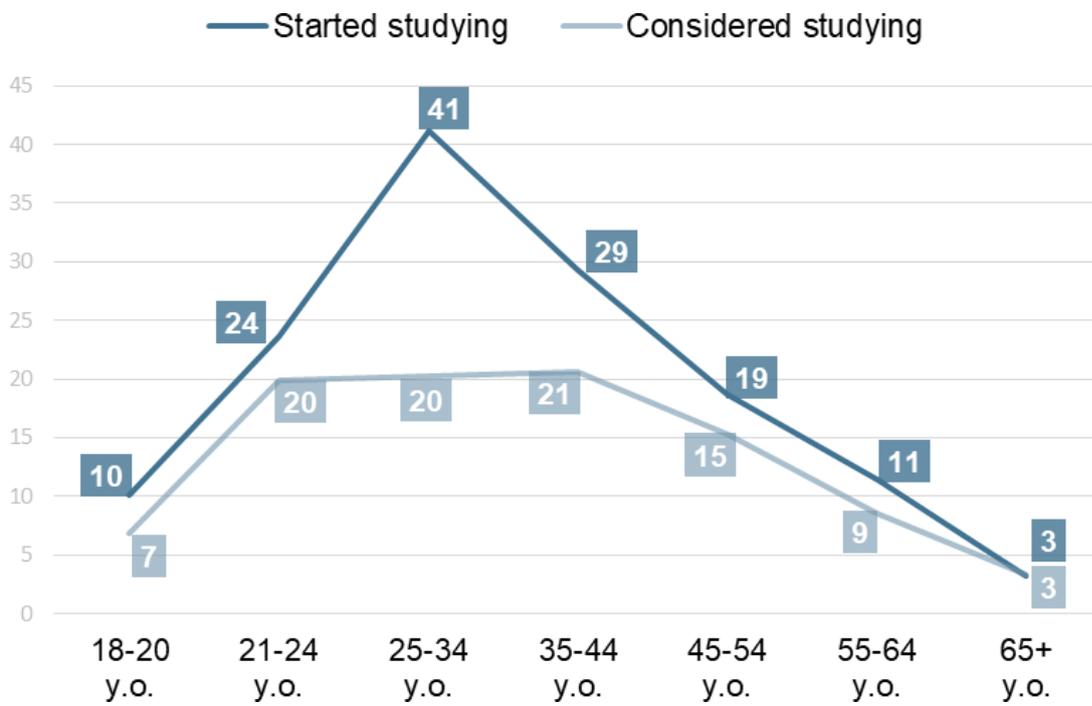
<sup>18</sup> For people aged 18-20 at the time they were considering or starting studying, only those considering or starting part-time education were classified as having 'considered' or 'started'

were particularly more likely to be PLs than those without (Table 3) were. Those with children with a degree were relatively less likely to be PLs, but this may be because those with children of university age or older are more likely to be older themselves, and therefore less likely to be considering or starting education.

**Figure 3: Proportion (%) of the general population that had considered or started studying for a new qualification in the last 5 years, by gender**

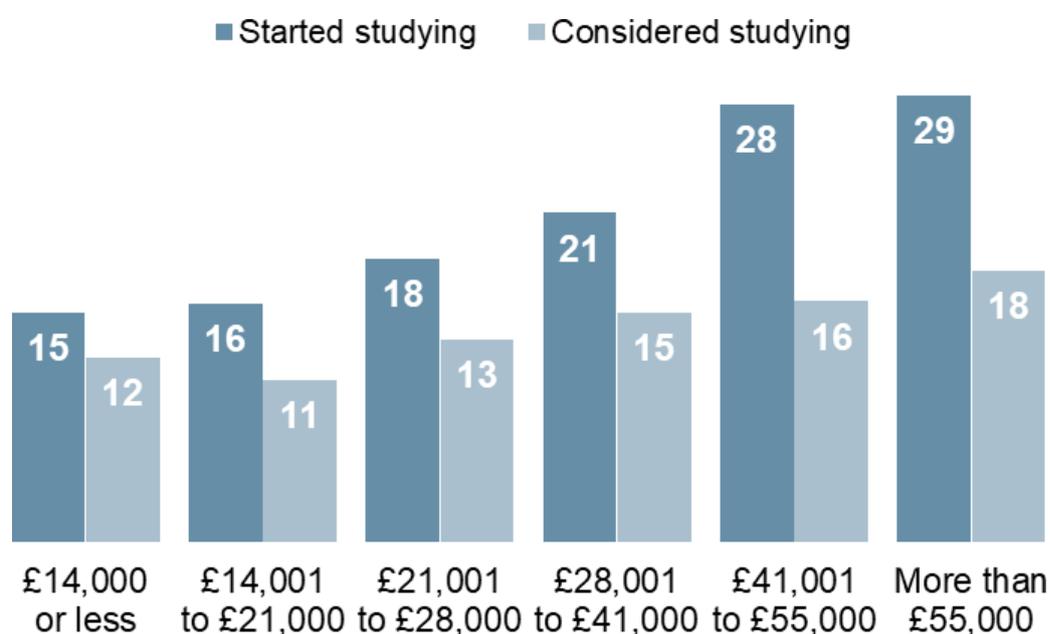


**Figure 4: Proportion (%) of the general population that had considered or started studying for a new qualification in the last 5 years, by age group**



Base: British population aged 18+ (18-20 (195); 21-24 (473); 25-34 (969); 35-44 (1,030); 45-54 (1,103) 55-64 (936); 65+ (1,422))

**Figure 5: Proportion (%) of the general population that had considered or started studying for a new qualification in the last 5 years, by current household income**

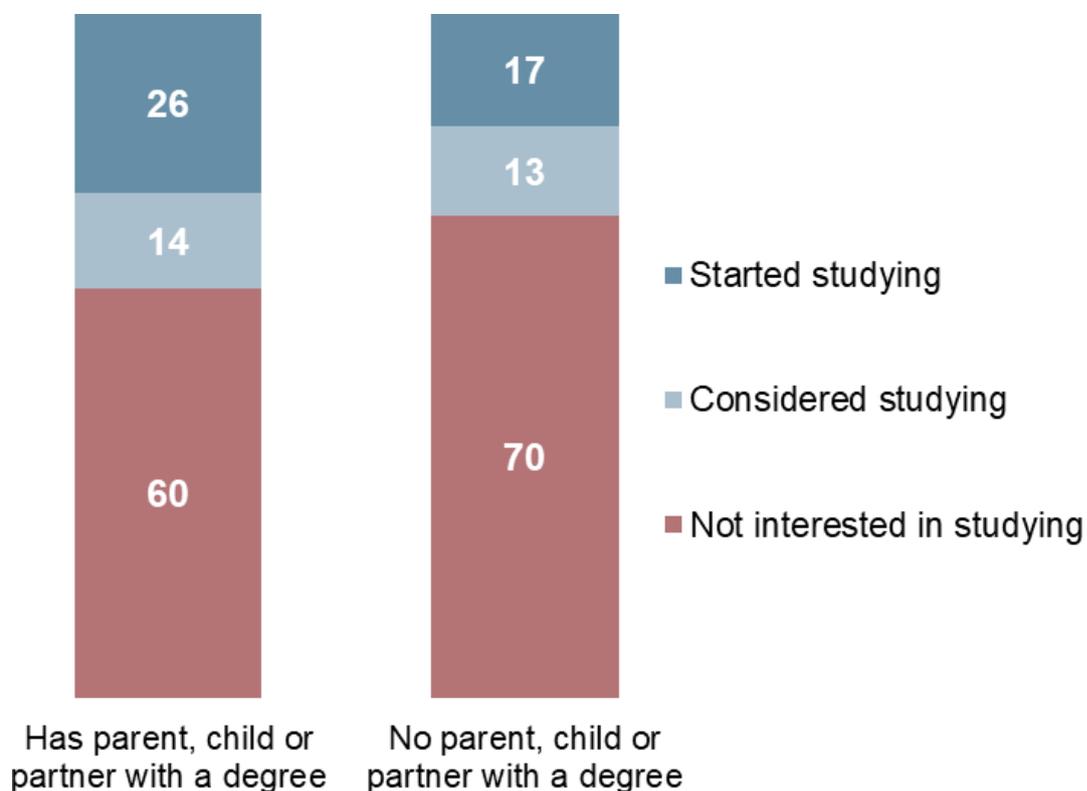


Base: British population aged 18+ (£14,000 or less (1,171); £14,001 to £21,000 (1,113); £21,001 to £28,000 (1,043); £28,001 to £41,000 (1,291); £41,001 to £55,000 (588); More than £55,000 (492))

**Table 2: Proportion of the general population that had considered or started studying for a new qualification in the last 5 years, by whether any and age of children**

	No children aged 18 or under	Yes, children aged under 5 years old	Yes, children aged 5 to 10 years old	Yes, children aged 11 to 15 years old	Yes, children aged 16 to 18 years old
Started studying	15%	36%	34%	32%	24%
Considered studying	11%	21%	21%	18%	15%
Not interested in studying	73%	42%	45%	50%	61%
<i>Unweighted base</i>	4449	620	728	612	360

**Figure 6: Proportion (%) of the general population that had considered or started studying in the last 5 years, by whether the respondent has a parent, child or partner with a degree**



Base: British population aged 18+ (Has parent, child or partner with a degree (1,968); Has no parent, child or partner with a degree (4,160))

**Table 3: Proportion of the general population that had considered or started studying for a new qualification in the last 5 years, by whether partner, a parent or any children have a degree**

	Partner	Parent	Any children	None of these
Started studying	37%	29%	14%	17%
Considered studying	16%	19%	9%	13%
Not interested in studying	47%	52%	77%	70%
<i>Unweighted base</i>	800	603	871	4,160

## 3.2. Qualifications, subjects and type of education provider considered

Having analysed the study plans of British adults, this report now focuses on the specific group of PLs, i.e. those who considered or started studying over the last five years.

### 3.2.1. Level of qualification considered or started

PLs considered a broad range of qualifications. They were most likely to have considered or started studying for a Level 3 qualification, followed by Level 6 qualifications, and then Level 4 or 5 qualifications. The same pattern emerged when focusing on *the most recent* qualification they considered or started studying for (Table 4). PLs that only considered studying were relatively more likely to consider a Level 3 qualification, than those that started studying (although this was just short of being statistically significant).

**Table 4: Proportion of prospective learners who considered or started studying different levels of qualifications, by whether considered or started studying**

	Considered studying	Started studying	Prospective learners
Level 3 qualifications	53%	45%	51%
Level 4 or 5 qualifications	32%	27%	31%
Level 6 qualifications	35%	36%	35%
<i>Unweighted bases</i>	719	266	985

The level of qualification considered or started was associated with:

- Participants' current highest level of education: as might be expected, those with higher qualifications were relatively more likely to have considered or started studying for higher levels of qualification.
- Income: those with higher household incomes were relatively more likely to have considered or started studying for Level 4 and above qualifications, and relatively less likely to have considered or started studying for Level 3 qualifications (Table 5). This may be due to the fact that participants with higher household incomes tend to have jobs requiring higher levels of qualification.
- The nature of the planned study: participants considering or starting part-time study were less likely to have considered or started Level 6 qualifications (Table 6).

Other demographic patterns were less clear – for example there are some intuitive ‘spikes’ in age, for example with PLs aged 21 to 34 relatively more likely to be studying for Level 6 qualifications, but few overall patterns.

**Table 5: Proportion of prospective learners who considered or started studying different levels of qualifications, by household income**

	£14,000 or less	£14,001 to £21,000	£21,001 to £28,000	£28,001 to £41,000	£41,001 to £55,000	More than £55,000
Level 3 qualifications	65%	60%	55%	51%	43%	32%
Level 4 or 5 qualifications	22%	20%	28%	35%	40%	38%
Level 6 qualifications	28%	28%	39%	30%	37%	48%
<i>Unweighted bases</i>	<i>140</i>	<i>130</i>	<i>125</i>	<i>178</i>	<i>158</i>	<i>159</i>

**Table 6: Proportion of prospective learners who considered or started studying different levels of qualifications, by type of course considered or started studying for (part time or full time)**

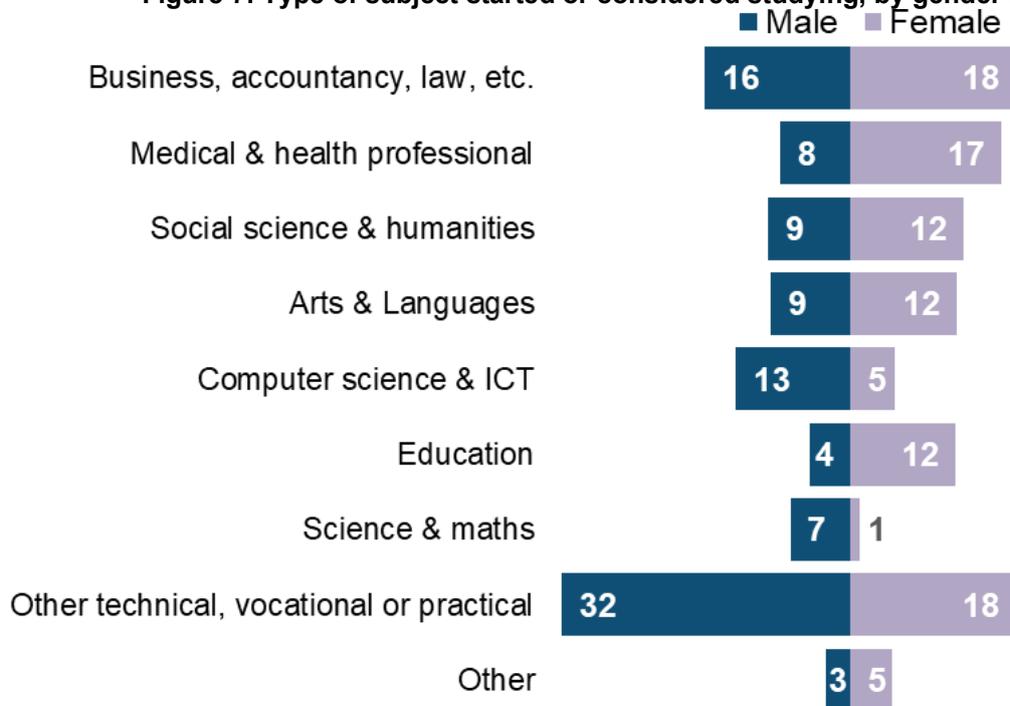
	Full time	Part time	Both full time and part time
Level 3 qualifications	41%	53%	54%
Level 4 or 5 qualifications	28%	32%	29%
Level 6 qualifications	55%	28%	46%
<i>Unweighted bases</i>	<i>178</i>	<i>697</i>	<i>109</i>

### 3.2.2. Subject considered or started

Overall, the subject of the most recent qualification PLs considered or started studying for tended to be practical or vocational rather than more ‘academic’ or ‘abstract’, though these groupings are somewhat subjective (see table 1 and table 2 in Appendix C).

Figure 7 groups subjects together thematically, and shows that the proportions considering or starting studying different subjects varied by sex. While the overall trends are similar, men were relatively more likely to consider or start studying STEM subjects such as science and maths or computer science and ICT, and ‘other’ technical, vocational, or practical subjects. Women were more likely to consider or start studying medical and health professional subjects and subjects related to education.

**Figure 7: Type of subject started or considered studying, by gender (%)**



Base: Prospective learners (Male=(438); Female=(545))

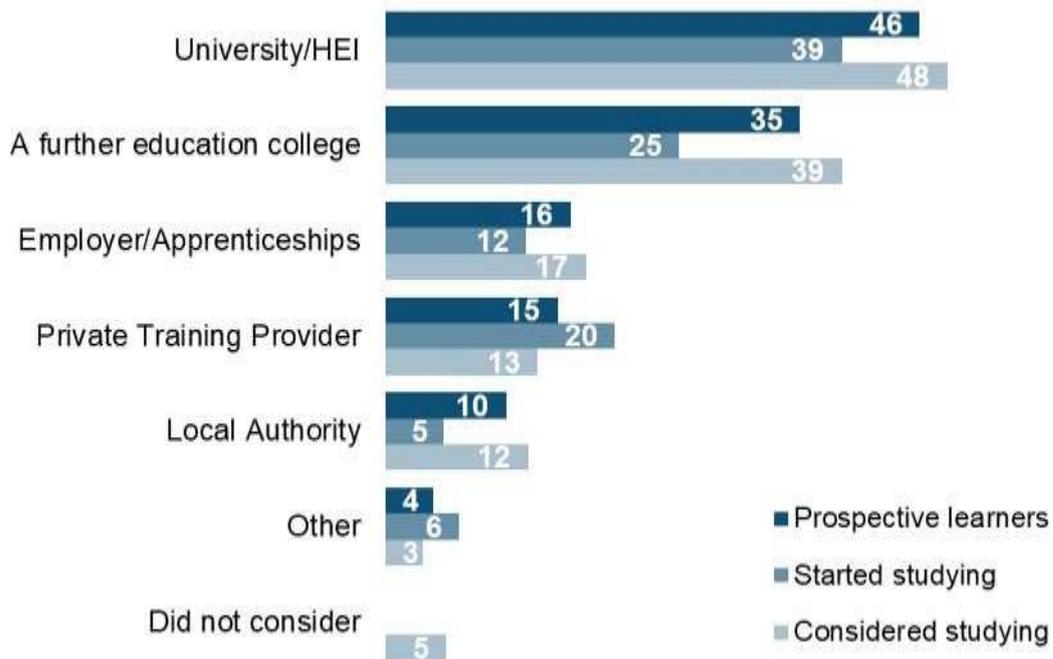
### 3.2.3. Types of educational provider considered or started studying through

Overall, PLs were most likely to have considered or started studying at a University or HEI, or an FE college when they most recently considered or started studying (Figure 8). Only five per cent of those who *only considered* studying did not think about the type of organisation they would study at<sup>19</sup>.

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<sup>19</sup> This option was not available to people who reported having started studying in the previous five years.

**Figure 8: Type of educational provider started or considered studying at, by whether considered or started studying (%)**



Base: Prospective learners (Started studying (266); Considered studying (719))

Note: The answer option “*Did not consider*” was not available for those who actually started a course

As might be expected, PLs considering or starting studying for a Level 3 qualification were relatively more likely to consider studying through a FE college and a mixture of other education providers, while those considering or starting studying for a Level 6 qualification focused much more on studying through a University or HEI (Table 7).

**Table 7: Proportion of prospective learners considering or starting studying through different types of education provider, by level of qualification considered or started studying**

	<b>Level 3</b>	<b>Level 4 or 5</b>	<b>Level 6</b>
University/HE institutions	27%	42%	79%
A FE college	48%	39%	20%
Private Training Provider (e.g. UK Youth, The Wise Group, Zurbel Training, etc.)	19%	19%	10%
Local Authority	16%	11%	6%
Employer/Apprenticeships	18%	26%	9%
Other	4%	3%	4%
Did not think about types of organisations	5%	4%	3%
<i>Unweighted bases</i>	<i>489</i>	<i>303</i>	<i>350</i>

When asked why they had considered or chosen those types of providers, PLs gave a range of different answers. Sixty-five per cent gave a reason related to education, 65 per cent gave a reason related to logistics, and 51 per cent gave a personal reason. Figure 9 breaks these groups out into their specific components. The reasons given varied by age, with those aged 55 or older more likely to focus on 'logistical' aspects of the education providers than those aged 18 to 54 (64 per cent vs 75 per cent).

**Figure 9: Reasons prospective learners considered or chose specific types of provider (%)**



Base: Prospective learners who considered or started studying at a provider (952)

### 3.2.4. Expected time to complete qualification

Overall, half of prospective learners expected to finish studying within two years. Those who considered or started studying part-time expected to study for a shorter period than those who considered or started studying full-time (Table 8).

**Table 8: Proportion of prospective learners assessing the expected time to complete the qualification considered/started by study mode**

	Full time	Part time	Both
Less than 1 year	10%	21%	6%
1 year or more but less than 2 years	33%	33%	30%
2 years or more but less than 3 years	22%	27%	37%
3 years or more but less than 4 years	27%	11%	17%
4 years or more but less than 5 years	7%	5%	6%
More than 5 years	1%	3%	3%
<i>Unweighted base</i>	178	697	109

While this sounds counter-intuitive, as it might be expected that part-time courses would include the same content spread over a larger period of time, it may be explained by prospective learners considering or starting *full-time*

education being more likely to study for degree-level qualifications (Section 3.3) which were expected to take longer (Table 9).

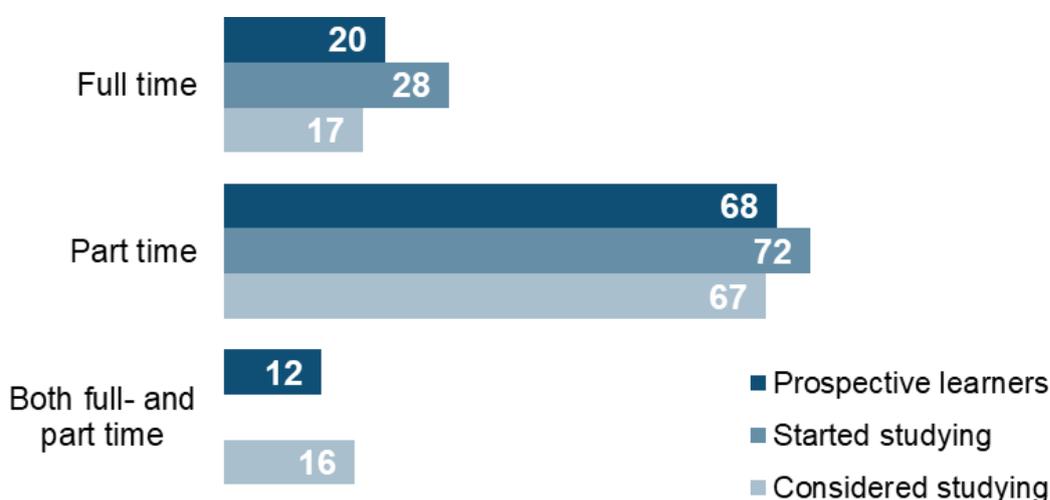
**Table 9: Proportion of prospective learners assessing the expected time to complete the qualification considered/started, by level of qualification**

	Level 3	Level 4 or 5	Level 6
Less than 1 year	22%	16%	11%
1 year or more but less than 2 years	40%	27%	25%
2 years or more but less than 3 years	28%	33%	22%
3 years or more but less than 4 years	7%	16%	25%
4 years or more but less than 5 years	2%	5%	12%
More than 5 years	1%	3%	5%
<i>Unweighted base</i>	489	303	350

### 3.3. Part-time vs. full-time

Overall, prospective learners were more likely to have considered or to have started studying part-time (68 per cent) than either just full-time (20 per cent) or both full-time and part-time (12 per cent) (Figure 10). Those that started studying were relatively more likely to have started full-time study than those who had only considered studying.

**Figure 10: Type of course most recently considered or started, by whether started or considered studying (%)**



Base: Prospective learners (Started studying (266); Considered studying (718))

Note: The answer option “Both full- and part-time” was not available for those who actually started a course

The extent to which prospective learners considered or started part- or full-time study varied by:

- Age: Older prospective learners were more likely to consider or start studying part-time (81 per cent of those aged 35 or over compared to 54 per cent of those aged under 35),
- Household income: those with lower household incomes were more likely to consider or start studying full-time (24% of those with household incomes of £28,000 or less compared to 15% of those with incomes of more than £28,000). However, this association might be spurious and actually influenced by age.

There does not appear to be a statistically significant relationship between whether someone considered or started studying part or full-time and employment status<sup>20</sup> or childcare responsibilities.

Prospective learners considering or starting studying for a Level 6 qualification were more likely to consider or start studying full time than those considering lower levels of qualification (Table 10).

**Table 10: Proportion of prospective learners considered or started studying full time, part time or both full time and part time, by level of qualification considered or started studying for**

	Level 3	Level 4 or 5	Level 6
Full time	16%	18%	31%
Part time	71%	71%	54%
Both full time and part time	13%	11%	16%
<i>Unweighted base</i>	488	302	349

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<sup>20</sup> Test conducted between those in employment and those not in paid work. The latter category includes: person not working but seeking work or temporarily unemployed, sick; person not working and not seeking work, or house person. Retirees and students were not included.

## 4. Goals and motivations of prospective learners

This chapter addresses Research Question 2: What are the overarching aims and goals of PLs?

The structure is as follows:

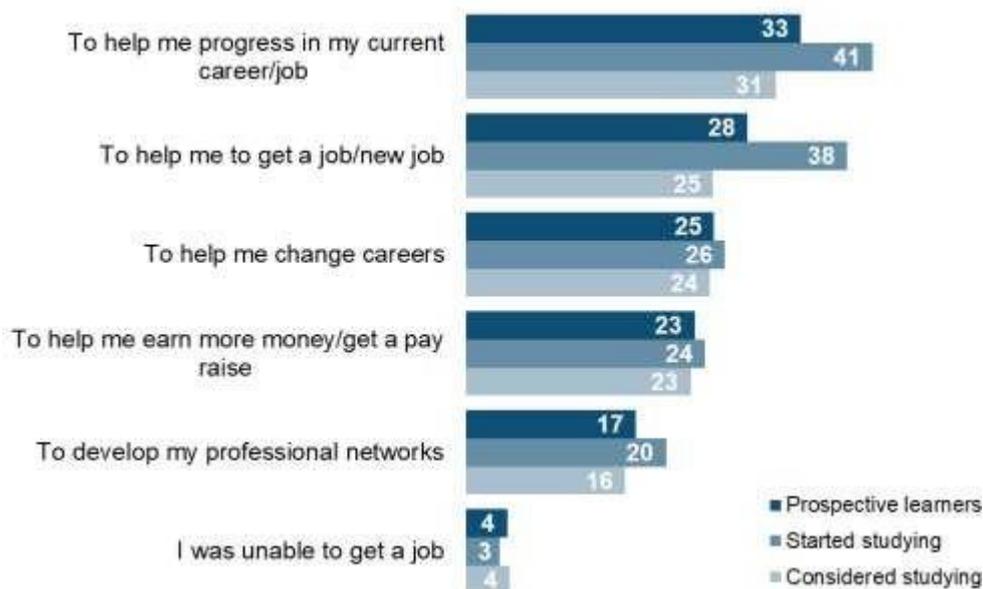
- The meaning of studying for professional reasons (4.1);
- The expected effects of studying on career development (4.2);
- The interlinkage of personal, educational and professional motivations, first using survey data (4.3), then interviews (4.4);
- Motivations for studying part-time (4.5); and
- The role of opportunities and external events (4.6).

### 4.1. Studying for professional reasons

One of the key objectives of the research was to understand if and how post-18 study relates to professional development. PLs were asked why they considered studying for the most recent qualification they considered or started studying for, and were provided with a range of 'professional', 'educational' and 'personal' reasons.

Figure 11 summarises the proportion of PLs that reported being motivated by each of the professional reasons. Overall, 76 per cent of PLs said that they were motivated to consider studying by at least one of these reasons.

**Figure 11: Proportion (%) of prospective learners considered or started studying for professional reasons**



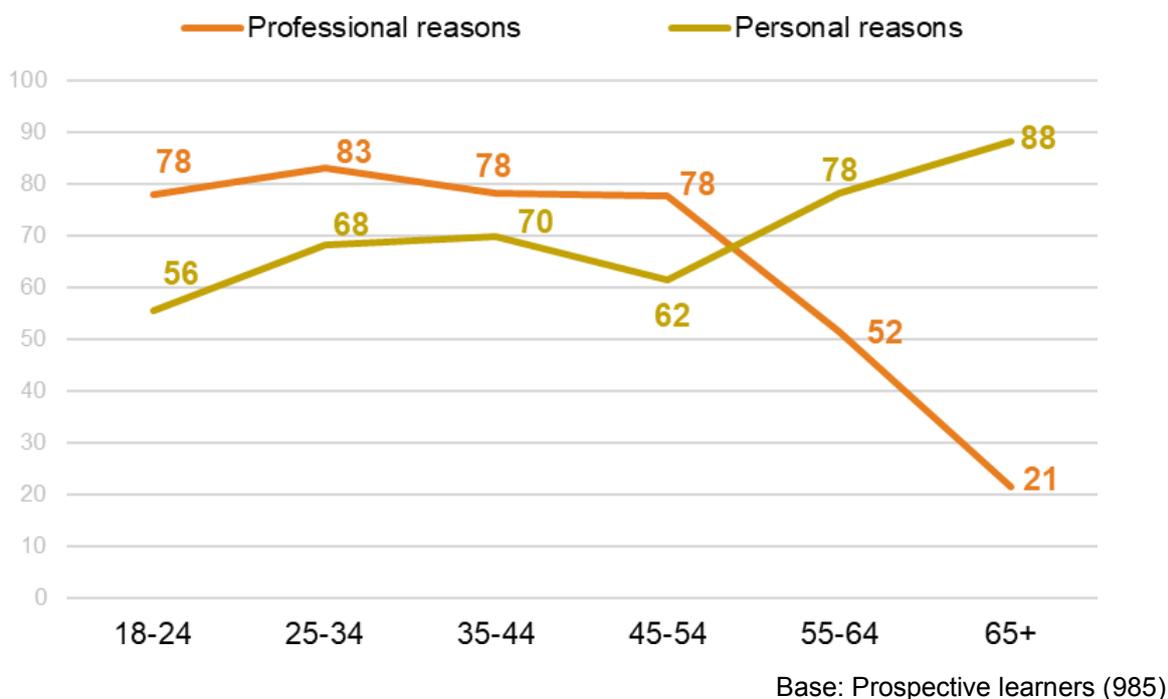
Base: Prospective learners (Started studying (266); Considered studying (719))

The proportion of PLs that considered or started studying for a professional reason varied by their demographic and socio-economic characteristics, including:

- Gender: women (79 per cent) were more likely to select a professional reason than men (72 per cent) were.

- Age: PLs under the age of 55 were more likely to be motivated by their career than older people (Figure 12). This is mirrored somewhat by the proportion reporting being motivated by personal reasons, which is lower for those under 55 than those above.
- Working status: As might be expected, those working full-time or part-time (80 per cent and 82 per cent respectively) were also more likely than those not working (60 per cent) to select any professional reason.

**Figure 12: Proportion (%) of prospective learners considered or started studying – for professional and personal reasons, by age group**



The proportion of PLs studying for professional reasons was associated with the ‘nature’ of that study. PLs motivated by career or professional reasons differed in their studying behaviour from the rest of the population in a number of ways:

- They were more likely to have actually started studying than those who were not motivated by career reasons (30 per cent compared to 14 per cent).
- They were also more likely to expect to complete their study in less than a year than those not motivated by career reasons (19 per cent compared to 11 per cent)
- They were more likely to have considered or started studying more ‘vocational’ or ‘practical’ subjects (e.g. ‘business, accountancy, law, etc.’, ‘education’, or ‘computer science’, ‘medical & health’) than ‘academic’ or ‘abstract’ ones (e.g. ‘science & maths’, or ‘arts & languages’).

- They were more likely to have considered or started Level 4 or 5 ‘sub-degree level’ qualifications (33 per cent compared to 24 per cent).

Professional motivations were not associated with the type of education provider considered (HEI vs. other type of education provider).

## 4.2. Sought effects of studying on career development

As can be seen from Figure 11, of all professional motivations to study, progressing in one’s current job was the most cited one (a third of respondents), followed by getting a new job, changing career and hoping for a pay rise (around a quarter of respondents each). Obviously, these motivations are not mutually exclusive and respondents often mentioned several of them.

These expectations varied by respondents’ demographic characteristics. Women were more likely than men to want to get a job/new job or change careers (32 per cent and 29 per cent vs. 23 per cent and 20 per cent respectively).

There was also a sense of progression with age in what career goals motivated PLs, with specific motivations peaking at different ages (Table 11):

- Those aged under 35 were most likely to be motivated by getting a job/changing job, or because they were unable to get a job.
- Those aged 35-54 were most likely to be motivated by progression in their current career/job.
- All career/professional motivations were relatively low amongst those aged 55+, and more so for those aged 65+.

**Table 11: Proportion of prospective learners who mentioned professional motivations to study, by age**

	18-24	25-34	35-44	45-54	55-64	65+
To help me progress in my current job	33%	31%	38%	43%	27%	6%
To help me to get a job/new job	33%	40%	22%	24%	13%	4%
To help me change careers	23%	34%	26%	18%	10%	7%
To help me earn more money/get a pay raise	26%	27%	26%	21%	8%	0%
To develop my professional networks	21%	19%	17%	17%	9%	7%
I was unable to get a job	5%	6%	1%	3%	2%	0%
<i>Unweighted base</i>	121	315	243	173	91	41

A similar pattern emerges for household income (Table 12):

- Those with the lowest household incomes (less than £14,000 per year) when considering or starting studying were most likely to be motivated by having been unable to get a job previously;
- Those with low household income (£14,000 to £21,000 per year) were more likely to be motivated by getting a job;
- Those with 'middle' incomes (£28,001 to £41,000) were more likely to be motivated by changing careers; and
- Those with the highest incomes (£41,001 or more) were more likely to be motivated by progressing in their current careers or developing their professional networks.

**Table 12: Proportion of prospective learners who mentioned professional motivations to study, by income**

	£14,000 or less	£14,001 to £21,000	£21,001 to £28,000	£28,001 to £41,000	£41,001 to £55,000	More than £55,000
To help me progress in my current job	22%	26%	32%	36%	50%	44%
To help me to get a job/new job	28%	45%	23%	26%	29%	21%
To help me change careers	23%	26%	23%	33%	20%	20%
To help me earn more money/get a pay raise	23%	31%	16%	26%	31%	15%
To develop my professional networks	8%	14%	19%	15%	26%	21%
I was unable to get a job	14%	3%	3%	1%	3%	2%
<i>Unweighted base</i>	140	130	125	178	158	159

Professional goals also varied by highest level of qualification. In particular, PLs whose highest level of education was A-Level (or equivalent) or below at the time of considering/starting studying were relatively more likely than the rest of the population to be motivated by earning more money (26 per cent vs. 18 per cent).

As well as being more likely to be motivated by career reasons overall, PLs considering or starting studying Level 4 or 5 qualifications were more likely to be motivated by progression in their current career or job than those considering or starting Level 3 or 6 qualifications (41 per cent compared to 30 per cent).

Among professional reasons, those that considered, but did not start studying were less likely to be motivated by getting a new job or progressing in their current job than those that actually started (25 per cent compared to 38 per cent and 31 per cent compared to 41 per cent, respectively).

Professional motivations did not vary significantly by type of education provider considered.

### 4.3. Interlinked motivations: qualitative findings

In line with the objectives of the study, qualitative interviews focused specifically on survey respondents who selected one or more professional or educational motivations for considering / studying for a qualification. The aim of these interviews was to explore the motivations and expectations of respondents in greater depth by letting them use their own words. On the surface, the motivations given by interviewees were remarkably close to the categories used in the survey. Indeed interviews revealed that, while sometimes overlapping, the aims reported fall broadly within the following categories:

- Career progression
- Career change
- Setting up / improving one's business
- Finding employment

Delving deeper into respondents' motivations highlighted the complexity of the decision to study for PLs. For example, participants considering / studying for qualifications with the intent to **progress in their careers** mentioned doing so for both career-related and personal development reasons. These two goals were often inextricably linked, as the intention to upskill and progress in one's career was motivated for many by the desire to challenge oneself, do something they found intellectually stimulating and rewarding, and improve the quality of their work.

*It's great to have a fresh pair of eyes... I'm self-improving for myself but I'm also increasing my knowledge 'cause within an industry you do get used to filling your role rather than sometimes the wider scope. [Employed in IT, studying for ITIL certification]*

Other interviewees defined career progression in terms of a position being less physically demanding, involving better hours (fewer or more depending on current employment patterns) and providing a higher salary and an improved work-life balance.

*Because of the type of work I do, I work all hours. When I finish the NVQ I'm thinking of getting a job with set hours of work... Rather than what I'm doing now, I start maybe eight o'clock in the morning, finish eight o'clock at night. [Employed in domiciliary care, studying for NVQ Level 4]*

*Getting on a bit in age, and the physical stuff is getting harder by the day... The financial side of it was a very good salary for the job. And would have been a hell of a lot easier, on the physical side. It would be walking around, rather than actually doing the job. [Employed in construction, considering NVQ in Health and Safety]*

Achieving a certain qualification was seen to facilitate career progression in a number of ways:

- By making one more '*marketable*', attractive to companies and competitive on the job market. This involved acquiring both specific qualifications and skills, as well as more general, '*transferable*' ones. While not possible to generalise from such small numbers, for those who were interviewed as part of this research the desire to be more marketable was a 'proactive' rather than 'reactive' one, i.e. it did not follow from having previously applied and been rejected for jobs.
- By ensuring the skills one has already acquired on the job are formally recognised.
- By enabling access to a higher graded position, for which the qualification considered or studied for was a necessary requirement.

Similarly to 'career progressers', participants interested in **changing careers** also stressed the importance of finding a job they would find intellectually stimulating and rewarding, especially in terms of having a social purpose and requiring a particular set of skills. For these participants, this motivation also underpinned the choice of subject and qualification considered / studied for.

*Now I'm a little bit older I do feel I have a bit more to give so I want to go back and change my career... [What appeals to me about teaching] is you would be doing something different every day... You would not just be doing one subject, you'd be doing a whole range of subjects and you do different age groups... It would be more stimulating than sitting there and talking to people over the phone every day. [Employed in finance customer services, considering BSc in English followed by PGCE]*

For those considering / studying for qualifications in sectors different from that of their current job, another significant motivation for focusing on specific qualifications was the likelihood of finding employment in that sector (e.g. Teaching; childcare). Opportunities for career progression and a more stable income were also referred to as important reasons.

*Working in construction and landscaping, it's very up and down... sometimes you'll be earning decent money, the next minute you're not earning anything... I wanted something a bit more stable... I'd like to work my way up [in teaching] to head of department level. Once you're a qualified teacher you can get on to middle leader training. [Previously employed in construction and landscaping, recently completed BSc in Education and Maths]*

Also like 'career progressers', the extent to which the qualifications considered / studied for were necessary in order to enter a certain profession varied among 'career changers'.

'Career changers' tended to differ from 'career progressers' in the extent to which the qualifications considered or studied for were related to their current jobs, with the former generally considering or studying for qualifications that were either less or un-related. Yet, the distinction between career progression and career change was not always so clear-cut in participants' accounts of their motivations and goals. In particular:

- Upskilling was considered by many to facilitate both career progression and eventual career change, as this involved enhancing and expanding one's skill-set as well as further specialising in their current 'strengths'.
- Some were looking for a 'horizontal' shift within the same sector and company rather for a 'vertical' one. While this shift required a different set

of skills, it was seen in terms of career progression as it led to a 'better' position – i.e. one requiring a more extensive or specialised set of skills, more stimulating and rewarding and/or with better working hours, pay and conditions.

- A few participants were already qualified in a particular sector but needed a specific qualification in order to be able to access the desired profession. For example, one prospective learner with a degree in law explained how he would need an LPC to be able to practice as solicitor. Another one who was a qualified nurse mentioned needing a Master's degree in education to be a nursing educator or lecturer.

Finally, there were those who were considering or studying on a course with the intent to set up or improve their own business or to find employment. One interviewee, for instance, intended to start a money transfer and mortgage advice company and was considering taking up a mortgage advice qualification so they could offer a greater range of services and increase their chance of success. Another interviewee, who was running a glass artwork business, had commenced an AS-level qualification in Graphic Design and Illustration to gain new skills that could be incorporated in their work. Yet another PL who had been unemployed for the past 9 years due to childcare commitments was considering studying for a Foundation Degree in 'Birth and Beyond' which was necessary to the role of breastfeeding counsellor.

While having distinct aims from the career progressers and career changers, interviewees intending to set up or improve their own business or to find employment had similar motivations. In particular, they also displayed a mix of career-related and personal development reasons in terms of looking for a 'better' job in the sense above defined.

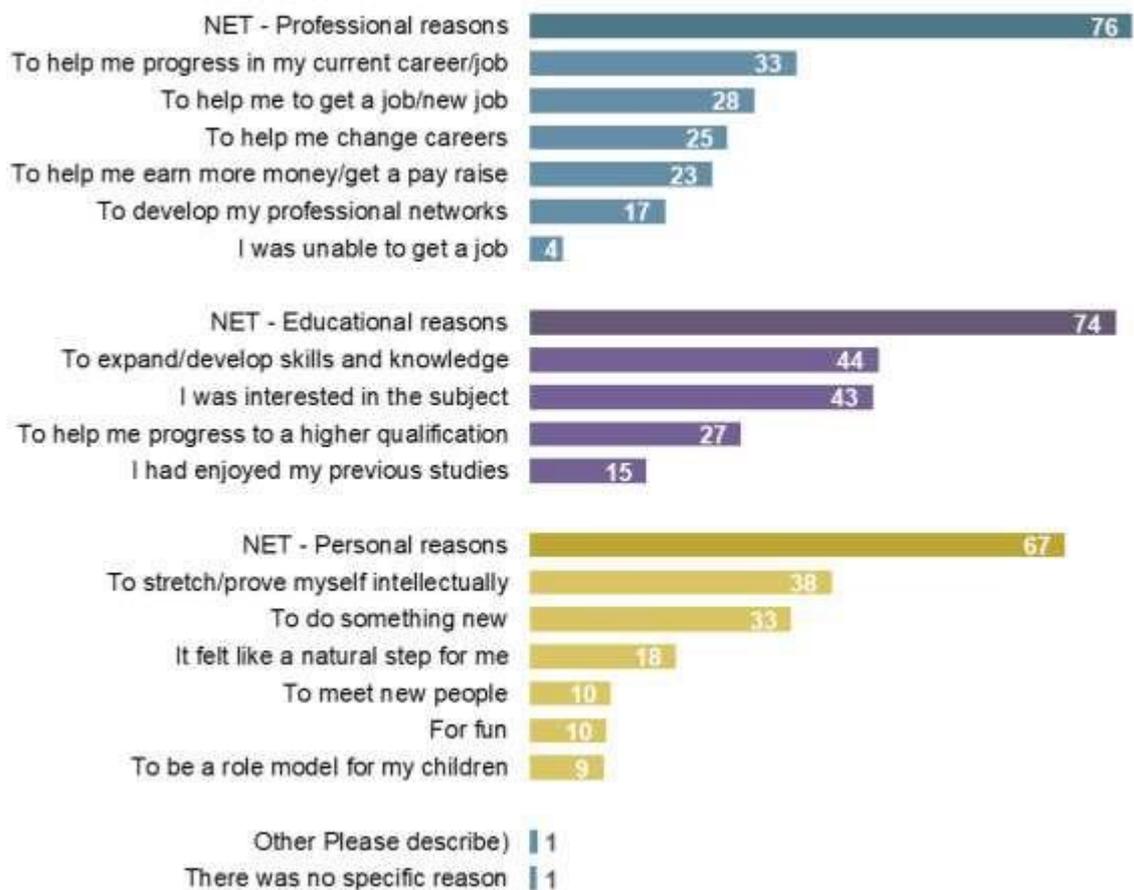
*I would like to do something that I am more genuinely passionate about... having had three children myself and I had very good support from breastfeeding counsellors myself, and I know how valuable that was... just to give something back.*  
[Considering National Childcare Trust foundation degree]

Those looking to find employment were all considering / studying for qualifications, which were necessary in order to access the desired profession. Although it is not possible to generalise from such a small number of cases, this highlights the importance for those who are looking for employment of being able to access adequate information about the credentials needed for various jobs.

## 4.4. Interlinked motivations: quantitative findings

The survey data also found an inextricable link between professional, educational and personal reasons. When asked why they considered studying for the most recent qualification they considered or started studying for, prospective learners also selected non-professional reasons. While 76 per cent gave a reason related to their career/profession, 74 per cent gave a reason related to education, and 67 per cent gave a more personal reason. Figure 13 breaks these groups out into their specific components.

**Figure 13: Proportion (%) of prospective learners with different types of reasons for considering or starting studying**



Base: Prospective learners (985)

Such high levels of coding for the different types of motivation indicate that prospective learners have multiple reasons for considering studying, and that these cut across multiple *types* of reason. Overall, 84 per cent of respondents selected more than one option (three on average), with 72 per cent selecting more than one *type* of reason, and 46 per cent selecting all three.

For the most part, there were few strong themes of association between specific motivations. Table 13 summarises the proportion of prospective learners selecting each motivation also selecting another motivation related to

professional reasons (see Appendix D for relation by educational reasons [Table D.1] and by personal reasons [Table D.2]). Focusing on professional reasons, some associations are implicit – those studying because they were unable to get a job were more likely to also be motivated by getting a job, and less likely to also be motivated by progressing in their career. Those looking to earn more money were relatively more likely to be motivated by getting a new job, but also by progressing in their own career, or progressing to a higher qualification. Those looking to progress in their current career were also relatively likely to look to progress to a higher qualification. Showing a slightly different pattern, those looking to get a new job or change careers were relatively more likely to be motivated by interest in the subject and doing something new.

**Table 13: Proportion of prospective learners selecting each motivation, by professional motivations**

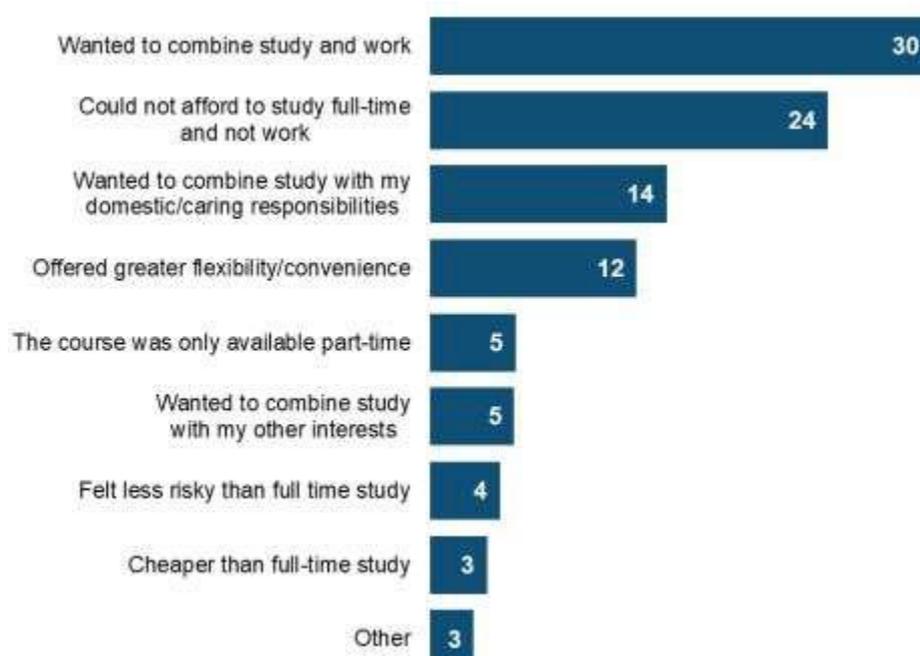
	To help me to get a job / new job	To help me change careers	To help me progress in my current career / job	To help me earn more money / get a pay raise	To develop my professional networks	I was unable to get a job
<b>Professional</b>						
To help me to get a job/new job	100%	46%	24%	46%	38%	57%
To help me change careers	41%	100%	13%	33%	22%	28%
To help me progress in my current career / job	27%	16%	100%	53%	53%	9%
To help me earn more money/get a pay raise	36%	28%	36%	100%	31%	15%
To develop my professional networks	21%	14%	26%	23%	100%	15%
I was unable to get a job	9%	5%	1%	3%	4%	100%
<b>Educational</b>						
To help me progress to a higher qualification	35%	29%	39%	45%	43%	22%
To expand / develop my range of skills and knowledge	51%	53%	53%	52%	60%	35%
I had enjoyed my previous studies	17%	16%	16%	16%	23%	17%
I was interested in the subject	52%	56%	41%	44%	56%	41%

Personal						
To do something new	43%	42%	24%	32%	34%	33%
For fun	7%	8%	7%	6%	12%	4%
To stretch/prove myself intellectually	41%	45%	46%	43%	53%	39%
To meet new people	10%	12%	11%	14%	20%	20%
It felt like a natural step for me	25%	19%	25%	27%	34%	15%
To be a role model for my children	14%	15%	9%	13%	11%	13%
<i>Unweighted base</i>	286	259	326	224	162	46

## 4.5. Motivations for studying part-time

There was no statistically significant association between the proportion considering or starting full- or part-time study and working status. However, for most considering part-time, or both part-time and full-time education, their *main* motivation for studying part-time was work-related: they wanted to combine study and work (30 per cent) or could not afford not to work (24 per cent). Following this, prospective part-time students were most likely to talk about other forms of study / life balance: wanting to combine study with domestic / caring responsibilities with study (14 per cent) or it simply 'offered greater flexibility / convenience' (12 per cent).

**Figure 14: Main reason why prospective learners considered or started studying a part-time course (%)**



Base: Prospective learners (806)

Men were relatively (but not statistically significantly) more likely than women to give work-related reasons for considering or starting studying part-time (58 per cent compared to 50 per cent), while women were statistically significantly more likely to consider domestic/caring responsibilities (19 per cent compared to eight per cent).

Thirty per cent of people with caring responsibilities of 10 hours per week or more identified wanting to combine study with domestic/caring responsibilities as their main reason for considering or starting part-time study, compared to 19 per cent of those with fewer than 10 hours, and seven per cent with no caring responsibilities. Those not working or working part-time were more likely to cite this motivation than people in full-time employment, who were more likely to give work-related reasons.

Interviewees also discussed the value of part-time learning. Most participants were considering / attending a part-time course. Where the employer sponsored the course, this was only available part-time. Others explained how they could only afford to study part-time as this would enable them to retain a source of income and to fit study around either part-time or full-time work and family. Continuing to receive an income was especially important for interviewees in order to sustain themselves and their families, to pay for course fees, and to retain the 'lifestyle' they were now used to. Interviewees also stressed how they considered their families and jobs to be their current priorities.

*I need to sustain the income that I earn, to sustain the lifestyle that me and my family have and I could not financially afford to give up work for a full-time course.*

*I have got used to a certain level of lifestyle and I don't really want to change that... I don't want to go back to being a student with no money to spend and so I want to get the work-life balance correct.*

Several also appreciated how part-time study allowed them to acquire practical experience in the sector alongside more academic learning.

*I wanted to combine study with work experience... I have a full time position here, if I went to do the course full time, I'd have to give up my position, so it made more sense to do it part time so I know I'm working and earning at the same time.*

On the other hand, some participants stressed how having part-time courses on one's CV is not always perceived positively by employers when looking for jobs.

## 4.6. Opportunities

Interviewees also mentioned that their decision to enter post-18 education was not just the outcome of a plan – be it long-term or short-term. Indeed, a variety of events and opportunities could trigger decisions. These ranged from personal circumstances, such as wanting to rebuild a life after an emotional breakdown or children growing up and becoming more independent, to employment-related motivations such as having been in the same position for several years and feeling stagnated, a sudden risk of losing one's main source of income, or contractual changes.

*Up 'til now, I've had at least one child full time for the past 9 years. So I've not needed anything else to keep me occupied. The realisation that [my youngest child] was coming into education prompted me to think about what I could do. [Currently unemployed, considering National Childcare Trust foundation degree]*

*Recent contract changes at my current job... were a slap in the face, devaluing loyal long term employees. And the company is a shadow of its former self. It's time for me to leave. [Employed in unskilled job at a major supermarket chain, considering IT qualification]*

Hearing from close others such as friends and relatives about their positive experiences of employment was also an important factor driving the decision to take-up a particular qualification.

*When we've been meeting up [with my friends from university]... they've been telling me about what they've been doing and how much they're enjoying it. And it's made me think about how much I'm not enjoying it. [Employed in finance customer services, considering BSc in English followed by PGCE]*

For many participants, the concrete opportunity to do a particular course triggered their decision to actually take it up. This usually meant one's employer partly or fully funding the course and was mostly the case for professional / technical qualifications rather than ones that are more academic. For some, obtaining a particular credential was a compulsory requirement of their current job. Among those for whom it was not a requirement, some actively looked for

such an opportunity while others were drawn to study having seen an advertisement at work, received notification through their employer's newsletter, or attended training sessions organised by their employer. The latter seemed to be especially effective as it provided the opportunity to get a 'hands on' experience and to access information that was more detailed.

*We've got a staff development officer at work and they advertise training programmes on the staff newsletter and that was posted on there, and I asked for more information and I had a meeting with her and my line manager and a lady from the training provider. [Employed full-time as university administrator, recently completed Level 3 Apprenticeship in Business Administration]*

*I did a training programme where they introduce you to librarianship. We had regular training sessions and one of the sessions was on postgraduate study... it was led by someone from one of the universities that offer the courses. There was also a chance to talk to people who were doing the course at the moment. [Employed full-time as university librarian, studying for [Master in Library Information Services Management](#)]*

More generally, rather than one specific trigger, it was often the combination of a number of enablers (e.g. one's employer now being willing to fund the course; children getting older) which favoured the adoption of concrete steps to make study a reality.

*I think that you've always got to look at improving yourself and the skills that you have. And you go on so many internal training courses to assist you but I think that now is the time in my life because my work-life balance is different, that I now have the time and capacity to do these qualifications. [Employed in construction customer services, considering NVQ Level 3 in customer services]*

Previous experiences of education and training, whether general or specific (e.g. teacher training) also functioned as either a deterrent, where negative, or as factors which encouraged take-up if positive. That most interviewees mentioned enjoying learning could perhaps be expected as we were only

interviewing those who had already taken concrete steps towards studying for a qualification. It is however important to note that problems with previous experiences of education were raised by two participants with disabilities.

*I had a lot of problems at school from being autistic. I didn't find out until I did my university course that I was autistic. I didn't find out until I did my university course that I was dyslexic as well. And I feel a lot of children are missing out in the same way because they're not getting the help they need. [Currently unemployed, considering LPC]*

*The reason [I do not enjoy studying in a class or group environment] is my communication issues and a lot of people often struggle to respect this. When I studied at college, I had a communication support worker and I was singled out on more than one occasion, which is very close to bullying. [Employed in unskilled job at a major supermarket chain, considering IT qualification]*

## 5. Overview of enablers and obstacles

This chapter addresses Research Question 3: What barriers do PLs face when choosing whether to enter education? What enablers are available that assist with the choice of whether to enter education and of what qualifications / level of education to choose?

It starts with a broad description of enablers and obstacles for the whole population of PLs (sections 5.1). Scores are then compared for a number of key subgroups, including: those who considered studying vs. those who started studying (5.2), those who considered studying in a HEI vs. any other institution (5.3), lower vs. higher income groups (5.4), etc.

Chapters 6 to 9 provide in depth analysis

### 5.1. Enablers and obstacles for the population of prospective learners

Sometimes, study plans fail to materialise. Although two thirds of PLs agreed that post-18 education is for ‘people like them’, only one quarter of them (26 per cent) reported that they actually started studying for the qualification they had most recently considered.

To help understand the gap between considering and starting study, participants were asked to consider a number of factors that can make it easier or more difficult for someone to enter education. These factors were grouped in five themes, namely: (i) affordability, (ii) choice and information, (iii) access, (iv) provision, and (v) personal factors.

Respondents were also asked about the extent to which these factors affected them, and how, when they recently considered / started education. Table 14 summarises participants’ responses to these questions, and provides a weighted ‘summary score’ between 1 and -1 for each one. The more positive the score, the greater the role that factor had as an enabler for PLs, and the more negative the score the more that factor acted as a barrier. Scores close to zero were either less applicable or acted equally as barriers to some and enablers to others.

A number of patterns emerge from Table 14.

#### **Affordability**

The population of PLs considered study costs – including tuition fees, living costs and equipment/travel costs – the strongest obstacles to post-18 education. Within these costs:

- Forty-four percent of PLs considered the cost of tuition fees as an obstacle (against 16 per cent who considered them an enabler).
- Thirty-nine percent of PLs considered the cost of books, equipment and travel as an obstacle (against 12 per cent who considered them an enabler).
- Thirty seven percent of PLs considered the cost of living while studying as an obstacle (against 11 per cent who considered them an enabler).

Given these results, it is surprising only about a fifth of the population of PLs found the availability of formal and informal support an enabler – however there are significant caveats to this result. Section 5.6 provides a comparison of how lower and higher income groups perceive the affordability of post-18 education. Chapter 6 also provides in depth analysis.

## **Choice and information**

All factors related to choice and information were considered as enablers. Nearly half of PLs found the availability of careers advice and of information about education opportunities as enabling education (48 per cent and 46 per cent respectively).

## **Access and flexibility**

PLs perceived the amount of time required to study, and the extent to which studying can be combined with work and family commitments, as key obstacles to post-18 education:

- Thirty-seven per cent of all PLs found the amount of time required to study an obstacle (vs. 22 per cent who found it an enabler)
- Thirty-five per cent of PLs found the balance with work commitments an obstacle (vs. 24 per cent who found it an enabler)
- Thirty-one per cent of PLs found the balance with family commitments an obstacle (vs. 23 per cent who found it an enabler).

Correspondingly, PLs saw factors making study time more efficient (e.g. flexibility, convenient location) as the second most important enabler to post-18 education: 40 per cent agreed that these factors were enablers.

## **Provision**

Unsurprisingly, the availability of courses matching the interests of PLs was the strongest enabler to post-18 education (38 per cent of PLs found this availability an enabler, vs. 14 per cent who found it more of an obstacle). PLs also

considered the level of difficulty of the course, the location of the institution and the complexity of the application process as enablers, albeit to a lower degree.

### **Personal factors**

PLs viewed personal factors, such as motivation and self-confidence as enablers, albeit to varying degrees.

The remainder of this section looks at how the summary scores vary for key subgroups. For the most part, the overall patterns remain (enablers remain enablers, and obstacles remain obstacles), but there are changes in the *extent* to which something is considered an obstacle or an enabler.

**Table 14: Overview of factors that can make it easier or more difficult for prospective learners to enter education and summary weighted score**

	Not able to enter educ. without <sup>21</sup>	Easier	Neither easier nor harder	Harder	This prevented me from entering educ.	NA	SCORE	Unweight. base
<b>Affordability</b>								
The cost of tuition fees	6%	10%	28%	32%	12%	12%	-0.35	983
The cost of books, equipment, travel, etc. related to study	3%	9%	36%	34%	5%	12%	-0.29	983
The cost of living while studying	3%	8%	35%	27%	10%	17%	-0.32	982
Availability of formal financial support (e.g. loans)	8%	12%	34%	21%	6%	20%	-0.06	982
Availability of informal financial support (e.g. family, friends)	5%	13%	38%	17%	6%	21%	-0.06	984
<b>Choice and information</b>								
Availability of careers advice	2%	20%	48%	12%	1%	17%	0.11	976
Availability of information about education opportunities	5%	27%	46%	12%	3%	9%	0.19	980
<b>Access and flexibility</b>								
Accessibility of the course (e.g. time, distance/flexible learning)	11%	29%	36%	16%	4%	6%	0.26	983
Location of institution (e.g. distance from home/work)	5%	25%	37%	18%	4%	11%	0.11	983
The amount of time required in study	5%	17%	37%	31%	6%	4%	-0.15	984

<sup>21</sup> Complete answer option: 'I would not have been able to enter education without this'

	Not able to enter educ. without <sup>21</sup>	Easier	Neither easier nor harder	Harder	This prevented me from entering educ.	NA	SCORE	Unweight. base
Balance with work commitments / support employer <sup>22</sup>	7%	17%	34%	28%	7%	7%	-0.12	732
Balance with family commitments / support from family	6%	17%	37%	26%	5%	8%	-0.06	985
<b>Provision</b>								
The match between available courses and my interests	7%	31%	42%	12%	2%	5%	0.28	984
Level of difficulty of the application process	3%	24%	50%	13%	2%	8%	0.13	981
Level of difficulty of the course	4%	18%	57%	15%	2%	5%	0.06	983
<b>Personal</b>								
Confidence in study ability/ previous experience in the education system	6%	29%	39%	18%	3%	5%	0.19	983
Maintaining motivation and interest in the course	8%	27%	38%	18%	3%	5%	0.18	983
Starting studying with friends/colleagues	3%	16%	42%	8%	2%	30%	0.1	982

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<sup>22</sup> Asked of those in employment

## 5.2. Considered vs. started studying

Table 15 summarises the associations between whether a factor was perceived to have acted as an obstacle or an enabler, and whether or not PLs started studying. As might be expected, those who started studying were generally more likely to consider a factor to have been an ‘enabler’, and less likely to consider a factor a ‘barrier’.

Those who did not start studying were significantly more likely than those who did to see three out of five affordability factors as having either prevented them from entering education or made this more difficult. These include: (1) the cost of tuition fees; (2) the cost of books, equipment, travel and other aspects related to study; and (3) the cost of living while studying. However, there was no significant difference in attitudes towards the role of financial support.

There was no significant difference in attitudes towards the role of information.

Perceiving each of the aspects related to accessibility as an enabler was associated with a prospective learner actually entering education.

Other aspects for which there were significant differences between those who only considered studying and those who started were the match between available courses and one’s interests and the level of difficulty of the application process. Those who started studying were significantly more likely to have experienced these factors as enablers compared to those who did not.

Considering the factors associated with ‘personal reasons’ as obstacles or enablers was not significantly associated with starting studying.

**Table 15: Proportion of prospective learners reporting factor made entering education easier or harder, by whether considered or started studying**

Barrier/Enabler and overall associated summary score		Considered studying	Started studying	Sig test
<b>Affordability</b>				
The cost of tuition fees -0.35	Total % easier	14%	20%	0.00
	Total % harder	49%	30%	
The cost of books, equipment, travel, etc. related to study -0.29	Total % easier	12%	11%	0.01
	Total % harder	42%	31%	
The cost of living while studying -0.32	Total % easier	12%	10%	0.00
	Total % harder	41%	26%	

<b>Barrier/Enabler and overall associated summary score</b>		<b>Considered studying</b>	<b>Started studying</b>	<b>Sig test</b>
Availability of formal financial support (e.g. loans) -0.06	Total % easier Total % harder	19% 31%	21% 16%	0.51
Availability of informal financial support (e.g. family, friends) -0.06	Total % easier Total % harder	17% 26%	21% 14%	0.23
<b>Choice and information</b>				
Availability of careers advice 0.11	Total % easier Total % harder	23% 13%	20% 11%	0.32
Availability of information about education opportunities 0.19	Total % easier Total % harder	30% 16%	35% 10%	0.20
<b>Access and flexibility</b>				
Accessibility of the course (e.g. time, distance or flexible learning) 0.26	Total % easier Total % harder	35% 23%	51% 11%	0.00
Location of institution (e.g. distance from home/work) 0.11	Total % easier Total % harder	28% 24%	37% 14%	0.04
The amount of time required in study -0.15	Total % easier Total % harder	20% 39%	28% 29%	0.02
Balance with work commitments / support from your employer -0.12	Total % easier Total % harder	21% 39%	32% 25%	0.00
Balance with family commitments / support from your family -0.06	Total % easier Total % harder	21% 33%	31% 25%	0.04
<b>Provision</b>				
The match between available courses and my interests 0.28	Total % easier Total % harder	34% 17%	49% 8%	0.00
Level of difficulty of the application process 0.13	Total % easier Total % harder	25% 16%	33% 11%	0.03
Level of difficulty of the course 0.06	Total % easier Total % harder	20% 18%	26% 15%	0.34

Barrier/Enabler and overall associated summary score		Considered studying	Started studying	Sig test
<b>Personal</b>				
Confidence in study ability/ previous experience in the education system 0.19	Total % easier Total % harder	34% 22%	39% 15%	0.23
Maintaining motivation and interest in the course 0.18	Total % easier Total % harder	34% 21%	39% 22%	0.19
Starting studying with friends/colleagues 0.10	Total % easier Total % harder	19% 10%	18% 8%	0.98

### 5.3. HEIs vs. other providers

The table below compares the list of enablers and obstacles for those who considered/started studying for a Level 4 qualification or above at a HEI and those who considered/started studying for a lower level qualification in another institution. Overall, the analysis found no major difference: the direction was the same for virtually all factors (i.e. a factor enabling studying at a HEI was also considered enabling studying in another institution) and most differences were not statistically significant.

Some of the larger differences between the two groups of PLs were related to the costs of study': those who considered/started studying at a HEI were more likely to find the cost of tuition fees and equipment costs a barrier to take-up than those who considered/started studying in another institution.

However, these differences in perceptions were not large enough to influence the decisions of PLs. Indeed, those who considered/started studying at a HEI were no more or less likely to actually start studying than those doing so in other institutions (27 per cent compared to 24 per cent).

**Table 16: Proportion of prospective learners reporting factor made entering education easier or harder, by whether considered or started studying in a HEI**

	Not through a University/HEI	Through a University/HEI
<b>Affordability</b>		
The cost of tuition fees	-0.20	-0.50
The cost of books, equipment, travel, etc. related to study	-0.13	-0.40
The cost of living while studying	-0.30	-0.40
Availability of formal financial support (e.g. loans)	0.03	-0.11
Availability of informal financial support (e.g. family, friends)	-0.10	-0.01

<b>Choice and information</b>		
Availability of careers advice	0.08	0.11
Availability of information about education opportunities	0.08	0.19
<b>Access and flexibility</b>		
Accessibility of the course (e.g. time, distance or flexible learning)	0.35	0.23
Location of institution (e.g. distance from home/work)	0.13	0.04
The amount of time required in study	-0.14	-0.31
Balance with work commitments / support from your employer	0.06	-0.30
Balance with family commitments / support from your family	0.01	-0.22
<b>Provision</b>		
The match between available courses and my interests	0.28	0.34
Level of difficulty of the application process	0.03	0.16
Level of difficulty of the course	-0.03	0.07
<b>Personal</b>		
Confidence in study ability/ previous experience in the education system	0.18	0.18
Maintaining motivation and interest in the course	0.20	0.14
Starting studying with friends/colleagues	0.05	0.02
<i>Unweighted base (estimate<sup>23</sup>)</i>	213	380

## 5.4. Lower vs. higher qualifications

The table below compares the list of enablers and obstacles for three different levels of qualification considered: Level 3, Level 4 or 5 (grouped) and Level 6. For the most part, the extent to which a factor was considered to have been an enabler or obstacle to studying also did not vary by the levels of qualification most recently considered.

There is some variation in the time/logistics factors: those considering or starting higher education (Level 4 and above) were more likely to consider the amount of time required in study an obstacle than those considering or starting Level 3 qualifications, and were more likely to consider balancing study with family commitments an obstacle. Similarly, those considering Level 6 qualifications who were in work were more likely to identify work commitments (/support from their employer) a barrier to study.

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<sup>23</sup> Actual base will vary from statement to statement.

However, these differences in perceptions were not large enough to influence decisions. Indeed, PLs were no more likely to start studying if they were considering studying for Level 3, Level 4 or 5, or Level 6 qualifications.

**Table 17: Proportion of prospective learners reporting factor made entering education easier or harder, by level of qualification**

	Level 3	Level 4 or 5	Level 6
<b>Affordability</b>			
The cost of tuition fees	-0.35	-0.35	-0.39
The cost of books, equipment, travel, related to study	-0.29	-0.26	-0.29
The cost of living while studying	-0.34	-0.30	-0.38
Availability of formal financial support (e.g. loans)	-0.06	-0.06	-0.03
Availability of informal financial support (e.g. family)	-0.10	-0.03	-0.02
<b>Choice and information</b>			
Availability of careers advice	0.11	0.13	0.11
Availability of information about education opportunities	0.18	0.14	0.13
<b>Access and flexibility</b>			
Accessibility of the course (e.g. time, distance or flexible learning)	0.24	0.24	0.31
Location of institution (e.g. distance from home/work)	0.10	0.08	0.06
The amount of time required in study	-0.06	-0.22	-0.27
Balance with work commitments / support from employer	-0.05	0.00	-0.28
Balance with family commitments / support from family	0.03	-0.15	-0.13
<b>Provision</b>			
The match between available courses and my interests	0.22	0.29	0.31
Level of difficulty of the application process	0.13	0.15	0.10
Level of difficulty of the course	0.09	0.02	0.05
<b>Personal</b>			
Confidence in study ability/ previous experience in the education system	0.20	0.08	0.27
Maintaining motivation and interest in the course	0.22	0.17	0.16
Starting studying with friends/colleagues	0.17	0.00	0.08
<i>Unweighted base (estimate<sup>24</sup>)</i>	488	303	349

<sup>24</sup> Actual base will vary from statement to statement.

## 5.5. Less vs. more caring responsibilities

The table below compares the list of enablers and obstacles for people with three different levels of caring responsibilities: none, fewer than 10 hours/week and 10 hours/week or more. Overall, a few significant differences were found.

Those with caring responsibilities differed from those without in the extent to which they considered certain factors obstacles or enablers. As can be expected, this was especially the case for aspects related to access. Overall, those with caring responsibilities were less likely than those without to think that course access had facilitated take-up. Those with more than 10 hours per week of caring responsibilities, in particular, were also more likely to have found the location of the institution a barrier.

Similarly, the time requirements of studying and balancing that with other responsibilities affected these groups differently. PLs with caring responsibilities were more likely to have experienced the balancing of study with family commitments (/support from your family) as an obstacle to studying. Those with more than 10 hours per week of caring responsibilities were additionally more likely to see the amount of time required in study as having prevented them from studying or made this more difficult.

These differences were large enough to influence decisions. Indeed, PLs with no caring responsibilities for children or others were more likely to start studying than those with caring responsibilities (29 per cent compared to 21 per cent)<sup>25</sup>.

**Table 18: Proportion of prospective learners reporting factor made entering education easier or harder, by amount of caring responsibilities**

	No caring responsibilities	Caring responsibilities - Fewer than 10 hours per week	Caring responsibilities - 10 hours per week or more
<b>Affordability</b>			
The cost of tuition fees	-0.30	-0.35	-0.48
The cost of books, equipment, travel, etc. related to study	-0.27	-0.18	-0.41
The cost of living while studying	-0.36	-0.24	-0.27
Availability of formal financial support (e.g. loans)	-0.04	-0.01	-0.15

<sup>25</sup> This is a different finding to the one in Section 3.1.2 that identified that, among adults in the general population, those that currently have children under 18 or caring responsibilities for people other than their children were more likely to be prospective learners. In contrast, these figures indicate that, among prospective learners, those who had caring responsibilities for children or caring responsibilities for other people when they considered or started studying were more likely than other prospective learners to actually start studying.

Availability of informal financial support (e.g. family, friends)	-0.07	-0.07	-0.05
<b>Choice and information</b>			
Availability of careers advice	0.12	0.15	0.09
Availability of information about education opportunities	0.22	0.25	0.07
<b>Access and flexibility</b>			
Accessibility of the course (e.g. time, distance or flexible learning)	0.35	0.21	0.07
Location of institution (e.g. distance from home/work)	0.15	0.21	-0.04
The amount of time required in study	-0.11	0.02	-0.31
Balance with work commitments / support from your employer	-0.10	-0.05	-0.19
Balance with family commitments / support from your family	0.06	-0.1	-0.36
<b>Provision</b>			
The match between available courses and my interests	0.33	0.33	0.14
Level of difficulty of the application process	0.15	0.16	0.09
Level of difficulty of the course	0.14	0.10	-0.15
<b>Personal</b>			
Confidence in study ability/ previous experience in the education system	0.25	-0.01	0.13
Maintaining motivation and interest in the course	0.19	0.20	0.15
Starting studying with friends/colleagues	0.12	0.06	0.06
<i>Unweighted base (estimate<sup>26</sup>)</i>	<i>611</i>	<i>112</i>	<i>260</i>

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<sup>26</sup> Actual base will vary from statement to statement.

## 5.6. Lower vs. higher household income

The table below compares the list of enablers and obstacles for different income groups. Overall, there were no major differences found, but a particular pattern is worth mentioning.

The table below shows that higher, more predictable costs items such as tuition fees (and, to a lesser extent, living costs) are a barrier to all income groups. However, those with lower incomes were more likely to consider lower/less predictable study costs (book, equipment and travel) a barrier. The difference with higher income groups is both large and significant. On the one hand, this association is substantively plausible and interesting but, on the other, the data has important limitations. First, household income is not equalised (it does not account for the number of people in the household), and so may not truly reflect participants' financial capacity. Second, the association between these two variables is not linear, as it would be expected if there was indeed an association in the population. Therefore, this result should be treated with caution.

Regardless, the differences seen in the table below were not large enough to influence decisions. Indeed, PLs with higher household incomes were not significantly more or less likely to have started studying than those with lower household incomes<sup>27</sup>

**Table 19: Proportion of prospective learners reporting factor made entering education easier or harder, by level of income**

	£14,000 or less	£14,001 to £21,000	£21,001 to £28,000	£28,001 to £41,000	£41,001 to £55,000	More than £55,000
<b>Affordability</b>						
The cost of tuition fees	-0.41	-0.22	-0.47	-0.29	-0.30	-0.41
The cost of books, equipment, travel, etc. related to study	-0.40	-0.21	-0.39	-0.28	-0.24	-0.22
The cost of living while studying	-0.42	-0.33	-0.50	-0.15	-0.26	-0.29
Availability of formal financial support (e.g. loans)	-0.21	0.03	-0.05	0.04	-0.01	-0.16

<sup>27</sup> This somewhat contradicts the finding in Section 3.1.2 that identified adults in the general population that had higher incomes at the time of interview were more likely to have started studying. However, the data in this section are based on a different sample, and a different base, and ask about the 'most recent' time they considered or started studying, rather than any times in the previous five years. The findings in this section also use income at the time that the respondent considered/started studying most recently; it may be that those that those who *currently* have a higher household income may be more likely to have previously started studying because that studying has led to them earning more, even though the differences in income *before* they started studying may not have been statistically significant.

Availability of informal financial support (e.g. family, friends)	-0.13	-0.05	-0.19	0.01	-0.02	0.01
<b>Choice and information</b>						
Availability of careers advice	0.09	0.18	-0.03	0.18	0.20	0.12
Availability of information about education opportunities	0.13	0.28	0.09	0.23	0.28	0.17
<b>Access and flexibility</b>						
Accessibility of the course (e.g. time, distance or flexible learning)	0.17	0.34	0.28	0.08	0.46	0.43
Location of institution (e.g. distance from home/work)	0.14	0.23	0.03	0.02	0.23	0.09
The amount of time required in study	-0.04	-0.03	-0.27	-0.07	-0.25	-0.27
Balance with work commitments / support from your employer	0.02	0.05	-0.16	-0.23	-0.18	-0.11
Balance with family commitments / support from your family	-0.07	0.07	-0.09	-0.05	-0.16	-0.07
<b>Provision</b>						
The match between available courses and my interests	0.21	0.37	0.33	0.17	0.38	0.38
Level of difficulty of the application process	0.02	0.28	0.13	0.15	0.24	0.04
Level of difficulty of the course	0.07	0.15	0.09	-0.03	0.15	0.04
<b>Personal</b>						
Confidence in study ability/ previous experience in the education system	0.09	0.06	0.10	0.29	0.30	0.31
Maintaining motivation and interest in the course	0.11	0.18	0.17	0.22	0.25	0.18
Starting studying with friends/colleagues	0.07	0.20	0.07	0.12	0.12	0.06
<i>Unweighted base (estimate<sup>28</sup>)</i>	139	130	124	178	158	159

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<sup>28</sup> Actual base will vary from statement to statement.

## 5.7. Younger vs. older

Table 20 compares the list of enablers and obstacles for different age groups. Overall, a few significant differences were found.

While the perceptions of costs of tuition fees and of books, equipment, etc. as enablers or obstacles did not vary so much between age groups, PLs aged under 55 were more likely to consider the cost of living while studying an obstacle to studying. At the same time, PLs aged 18-24, unlike the population as a whole, tended to see the availability of both formal and informal financial support as facilitating their access to education, while older age groups were more likely to have considered these two aspects as not applicable to them.

The extent that time was seen as a barrier also varied by age group. PLs aged 25 to 64 were more likely to consider the time required in study a barrier, but the youngest and oldest PLs were less likely to consider this as an obstacle.

Finally, starting studying with friends/colleagues played more of a role for younger people, who were more likely to consider this an enabling factor, while the rest of the population viewed it relatively neutrally.

These differences in perceptions were not large enough to influence decisions. Indeed, the proportion of PLs starting studying did not vary significantly by age group.

**Table 20: Proportion of prospective learners reporting factor made entering education easier or harder, by age group**

	18-24	25-34	35-44	45-54	55-64	65+
<b>Affordability</b>						
The cost of tuition fees	-0.38	-0.37	-0.34	-0.43	-0.25	-0.22
The cost of books, equipment, travel, etc. related to study	-0.33	-0.27	-0.24	-0.42	-0.26	-0.37
The cost of living while studying	-0.45	-0.30	-0.33	-0.39	-0.16	-0.13
Availability of formal financial support (e.g. loans)	0.20	-0.15	-0.04	-0.20	-0.02	0.06
Availability of informal financial support (e.g. family, friends)	0.08	-0.11	-0.02	-0.19	-0.09	0.09
<b>Choice and information</b>						
Availability of careers advice	0.16	0.06	0.11	0.15	0.14	0.09
Availability of information about education opportunities	0.24	0.11	0.25	0.20	0.13	0.24
<b>Access and flexibility</b>						
Accessibility of the course (e.g. time, distance or flexible learning)	0.34	0.15	0.37	0.18	0.34	0.39
Location of institution (e.g. distance from home/work)	-0.02	0.04	0.15	0.26	0.09	0.11

The amount of time required in study	0.02	-0.25	-0.18	-0.17	-0.11	0.17
Balance with work commitments / support from your employer	-0.14	-0.17	-0.03	-0.15	-0.12	-0.09
Balance with family commitments / support from your family	0.20	-0.17	-0.16	0.01	-0.10	0.10
<b>Provision</b>						
The match between available courses and my interests	0.24	0.25	0.32	0.27	0.32	0.41
Level of difficulty of the application process	0.18	0.10	0.18	0.14	0.04	0.12
Level of difficulty of the course	0.05	0.04	0.06	0.07	0.16	0.01
<b>Personal</b>						
Confidence in study ability/ previous experience in the education system	0.30	0.07	0.19	0.25	0.25	0.25
Maintaining motivation and interest in the course	0.30	0.06	0.24	0.20	0.23	0.21
Starting studying with friends/colleagues	0.16	0.11	0.08	0.07	0.05	-0.02
<i>Unweighted base (estimate<sup>29</sup>)</i>	<i>121</i>	<i>315</i>	<i>243</i>	<i>172</i>	<i>90</i>	<i>41</i>

## 5.8. Women vs. men

The table below compares the list of enablers and obstacles for men and women. Overall, men were consistently more likely to have found these factors less of an obstacle, or more of an enabler, than women. That it is seen across all factors may indicate there is an underlying reason for women answering in a consistently different pattern, rather than each factor having specific reasons. Overall, men and women 'prioritise' the factors similarly – they are both most likely to consider the accessibility of the course and the match between the course and their interests as enablers, and cost factors as barriers.

It is also interesting that despite this pattern, female PLs were more likely to start studying their most recent qualification considered than men (31 per cent compared to 20 per cent).

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<sup>29</sup> Actual base will vary from statement to statement.

**Table 21: Proportion of prospective learners reporting factor made entering education easier or harder, by gender**

	Male	Female
<b>Affordability</b>		
The cost of tuition fees	-0.23	-0.45
The cost of books, equipment, travel, etc. related to study	-0.15	-0.42
The cost of living while studying	-0.24	-0.39
Availability of formal financial support (e.g. loans)	0.04	-0.14
Availability of informal financial support (e.g. family, friends)	-0.01	-0.11
<b>Choice and information</b>		
Availability of careers advice	0.16	0.08
Availability of information about education opportunities	0.23	0.15
<b>Access and flexibility</b>		
Accessibility of the course (e.g. time, distance or flexible learning)	0.36	0.17
Location of institution (e.g. distance from home/work)	0.15	0.07
The amount of time required in study	-0.13	-0.16
Balance with work commitments / support from your employer	-0.03	-0.20
Balance with family commitments / support from your family	-0.02	-0.10
<b>Provision</b>		
The match between available courses and my interests	0.42	0.17
Level of difficulty of the application process	0.19	0.09
Level of difficulty of the course	0.17	-0.03
<b>Personal</b>		
Confidence in study ability/ previous experience in the education system	0.28	0.11
Maintaining motivation and interest in the course	0.26	0.12
Starting studying with friends/colleagues	0.13	0.06
<i>Unweighted base (estimate<sup>30</sup>)</i>	437	544

## 6. In-depth analysis: Affordability

The following four chapters provide in-depth analysis on the four factors more frequently identified as enablers/barriers by respondents, namely affordability, choice and information, access and flexibility, and provision.

Chapter 6 below focuses on affordability and addresses Research Question 4: To what extent did PLs consider the cost of study as an enabler or a barrier? What financial support did they consider?

It explores:

- The extent to which study costs prevent PLs entering post-18 education and who is most affected (6.1);
- The extent to which financial support from the government (6.2) and employers (6.3) can act as an enabler;
- The perceived adequacy of existing financial support provisions (6.4).

### 6.1. Costs

#### 6.1.1. Tuition fees

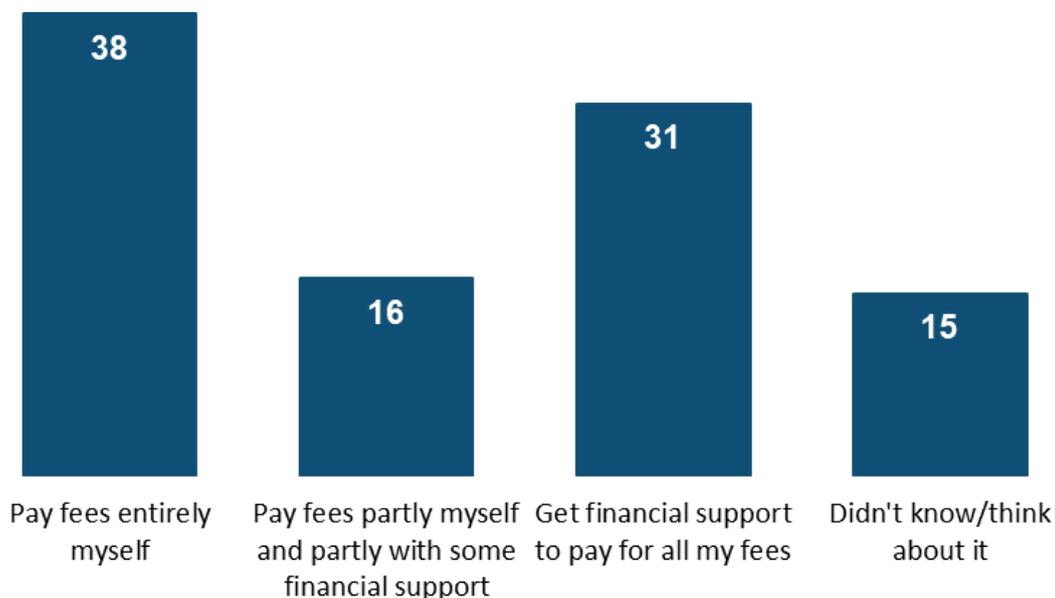
Overall, PLs identified the financial cost of studying as the main obstacle to their take-up of post-18 education. Forty-four per cent of survey respondents considered the cost of tuition fees to have either impaired or prevented them from studying for a qualification. Sizeable proportions also cited the costs of books, equipment and travel (39 per cent), and living costs (37 per cent) as an impairment or preventative.

There is a great variety in the cost of tuition fees for post-18 education. Around a fifth of PLs considered or started a course that did not have any fees, another fifth considered/started a course with fees of £999 or less and another fifth considered/started a course with fees of £5,000 or more. There was almost an equal split between other PLs who considered/started courses with fees between £1,000 and £4,999 and those who did not know whether the course they considered/started studying for had any fee.

Among those who considered/started a course that had fees, a relative majority (nearly 40 per cent) intended to pay the fees entirely themselves (Figure 1). Nearly a third intended to get financial support to pay for all their fees. There was almost an equal split between other PLs who intended to get support for some of their fees, and those who did not know how they would fund their studies at this stage. As expected, financing was associated with household income. PLs from lower income groups were: (i) less likely to

plan to pay the fees entirely themselves; and (ii) more likely to not know how they would pay for their tuition fees (results not shown).

**Figure 15: How prospective learners intended to fund or funded their studying (%)**



Base: Prospective learners who reported that the course they most recently considered/started studying had fees (811)

Among those who planned to ask for financial support, the main sources of support were the Student Loans Company (30 per cent of respondents), the respondent's employer (30 per cent) and the government (24 per cent). However, as shown in Table 22, this varied by income level. PLs from lower income households were (i) more likely to consider support from government or the Student Loans Company; and (ii) less likely to consider support from their employer (see table below). Overall, the sources of financial support considered did not significantly vary by type of qualification considered. The only noticeable difference is that PLs considering a Level 6 qualification were more likely to (intend to) request support from the Student Loans Company and less likely to (intend to) request support from their employer than PLs considering lower qualifications (results not shown).

**Table 22: Proportion of prospective learners who intended to receive or received financial support, by household income**

	£14,000 or less	£14,001 to £21,000	£21,001 to £28,000	£28,001 to £41,000	£41,001 to £55,000	More than £55,000
Friends or family	5%	8%	14%	10%	8%	18%
My employer	4%	15%	17%	38%	57%	50%
Bank	9%	8%	1%	4%	8%	6%

The government	37%	31%	30%	18%	20%	8%
The NHS/health department	7%	6%	-	4%	2%	12%
The institution I study at	15%	14%	7%	-	4%	6%
Loans from the Student Loans Company	36%	24%	41%	35%	24%	10%
Advanced Learner Loan (Previously 24+ Advanced Learner Loans)	14%	10%	8%	4%	6%	3%
A charity	-	6%	-	-	1%	3%
Teaching Bursary	8%	9%	7%	2%	5%	7%
Other (Please describe)	-	11%	5%	-	3%	7%
<i>Unweighted base</i>	61	44	47	62	70	61

Despite generally perceiving the costs of studying as a barrier, PLs tended to agree that they would benefit (or would have benefited) financially from studying, with 60 per cent agreeing or strongly agreeing, and 11 per cent disagreeing or strongly disagreeing. Younger people and those who started studying were more likely to hold this view.

Reflecting these findings, most interviewees whose qualification was not sponsored by their employer discussed costs as the key barrier encountered. The extent to which this undermined the take up of studies varied among participants. For some, it constrained their options in terms of course, provider and/or mode of learning.

For others, it prevented them from taking up studying altogether. The reasons for this variation had mostly to do with the availability of local provision for the course of interest, the possibility to fit study around work thus retaining a source of income, and having savings aside on which one could draw. One participant mentioned that they previously stopped a course as their employer could no longer fund it. Some additionally stressed how even costs of a few thousand pounds a year can become disabling, especially if one has a family and/or other financial commitments.

*The company I was working for was made insolvent and we got the funding cut, and I couldn't afford to fund [the course] myself with the family that I had, which was rather annoying for the effort that I put in... There just wasn't enough money in the pot to cover the funding, to pay the monthly fee. [Employed in IT, studying for IT qualification]*

*I wouldn't have been able to do the undergraduate Local History course, except for the fact that my employers paid for it... Because I worked part-time, I couldn't take on extra finance... I know £3000 doesn't sound like a lot, but when you're working part-time with a child it is a lot of money. [Employed part-time as librarian, recently completed undergraduate Advanced Diploma in Local History]*

While still perceiving course fees as a substantial barrier, a few interviewees pointed to the possibility to pay these in monthly instalments as facilitating the take-up of studies. The prospect of higher earnings and high qualifications also functioned for some as an incentive, which could trump considerations of costs, and confirms the perception of financial benefits deriving from participation that emerged from the survey.

Also in line with survey findings, it is important to note that considerations over the costs of study did not only relate to the amount of fees to be paid and the possibility to spread their payment over time, but included expenses for study resources, for example key textbooks, course material and other equipment such as laptops, and for travelling.

*I received nothing whatsoever, I had to buy it all myself. They're quite expensive. I paid £45 for a book and you can't find everything in one book, you have to buy various books to cover everything.*

## **6.2. Financial support from government**

The availability of financial support, both formal (e.g. loans) and informal (e.g. family support), was identified as an enabler by around one-fifth of PLs. This did not vary significantly by income group.

### **6.2.1. Student loans for tuition fees**

PLs may need government support to cover their tuition fees, living costs or equipment costs (not covered). Starting with tuition fees, the survey shows that just under two-thirds of PLs knew about government student loans for tuition fees, but only 17 percent of PLs actually applied for one. These proportions varied by:

- Household income: PLs from lower-income households were more likely to (i) consider applying for a student loan, (ii) actually apply, and (iii) be found eligible (results not shown).
- Level of qualification considered: PLs considering the highest level of qualification (Level 6) were more likely to actually apply for a loan (results not shown).

Among those who did not consider applying for a government study loan, over half of respondents stated that they did not need one. However, large groups declared that they knew they would not qualify for a loan (22 per cent) or were concerned about increasing their level of debt (22 per cent).

## 6.2.2. Student loans for living costs

Whilst two-thirds of PLs knew about government student loans for tuition fees, just over half of them (52 percent) knew about government loans for living expenses. However, only 10 per cent of PLs actually applied for one. This varied by household income, with PLs from lower-income households more likely to (i) be aware of these loans, (ii) consider applying, and (iii) actually apply. The reasons for not applying for a student loan covering living costs were very similar to the reasons mentioned for not applying for a loan covering tuition fees (results not shown).

## 6.2.3. Awareness and understanding of student finances

When looking in more depth at views and experiences of the student finance system, most interviewees stated they had a very limited understanding of student finances before actively looking into this. Quite a few found the system too complex to understand and expressed concerns over the difficulty to find clear and comprehensive information, especially for mature students.

*The information isn't there and it's not readily available. You have to dig really deep to find information about what kind of funding there is available... When I did my full-time studies I took out a student loan and that was just like 'take out a loan'... So I'm already kind of in debt... I've just got this thing in my head that 'is there even funding available for me?'... I find you have to really make a few phone calls, do this, do that, to get the information. [Considering Mortgage Advice CeMAP through university provider]*

*I'm struggling to understand what funding is available for people of my age and how it will affect my current credit history. I already have a mortgage, I already have a full-time job and other financial commitments, how can I afford it all?... The details on funding is slightly confusing and I need to revisit it with someone else to help me understand. [Considering IT Microsoft Certification]*

As a result of the unavailability of easily accessible information, they were often put off searching for funding more thoroughly where they felt they were not eligible, and/or did not find out about the loans or grants available to them until after they had completed their course.

*I don't [understand the student finance system] at all. I didn't realise until recently when my son's girlfriend was wanting to do an Open University course, that there was some funding in some shape or form for people over 21. Because she was looking at a uni course though, I don't know if it covers the NVQ too. [Considering Foundation NVQ in Adult Education through FE provider]*

*It wasn't until later, when I was looking to see if I could get funding for the assessment only route into teaching, that they said you could get all these grants and stuff, that I could get if I was training, and a parent... Because I never knew anything about that beforehand... Nothing about grants was ever explained to me, or anything like that, until it was almost too late.*

Consequently, interviewees emphasised the need for more transparent, coherent and exhaustive information on eligibility for various sources of funding.

*If there was a website where you could just put in 'these are your family circumstances and earnings'... that may be useful. Because there's a lot of reading and smallprint... if there were an easier way, and like an answer whether you'd be eligible for anything.*

*[Looking into student finances] felt very much like you were 18 years old going to university. It felt like it was very much geared up just for that... You could possibly branch the system out, like 'are you a mature student?'... It would have been easier to have maybe split it that way, and then you could look into the grants. The wording just wasn't very clear... they were using all the usual jargon and things, which you wouldn't know straight away.*

One interviewee with a deafness condition also highlighted the importance for those who have a communication impairment of being able to access comprehensive information online.

*I think more information on funding is important. I haven't been able to look in detail because I'm not sure where I need to go. It appears to me that I might need to speak to an advisor, but with communication issues I would prefer to read it online.*

#### **6.2.4. Doubts about eligibility**

The reasons provided by interviewees for not thinking they would be eligible for student funding, whether loans or grants, had mainly to do with:

- having previously taken up loans / grants for studying
- considering or studying for qualifications both through distance learning and in part-time mode.

*I didn't know about it, and because I was doing this sort of part time online, I didn't think I would be able to get any finance for it. [Recently completed NCFE Level 2 certificate through university provider in distance learning, part-time mode]*

- considering or studying for qualifications at postgraduate level (e.g. Master's degrees).

*I don't know whether [I would be eligible for student finances] because this is not a basic degree... this is like something more to it... From what I gather you need funding from your own company as the bank can be quite tight about giving out loans. [Considering [Master in Nursing Education](#) through university provider]*

On the other hand, interview participants believed those on low incomes or single parents would be more likely to be eligible for student funding.

Among those who actively looked into available funding, some found out they were eligible for loans, which then triggered the decision to take the course up. The two participants who had used the student finance system to fund their current course found it helpful and simple to use. In these cases, the system functioned as an enabler. Participants who intended to or had taken up a loan also pointed to the importance of this matching their wages in order to be able to reduce their working hours, as well as of repayment being taken directly from their pay packets.

*[The main factor affecting my decision to commence studies] was looking into the student finance... I had to make sure the student finance matched my wages in order for me to be able to give up my full-time job... I think it's a lot easier now to access it... I think a lot of people don't realise how much help you can get. [Previously employed full-time as Teaching Assistant, now starting full-time Degree Level course in Midwifery]*

*If it wasn't for Student Finance England, I would not have been able to fund my degree... Because it doesn't overtly affect your credit rating and future lending abilities, and it's only a percentage of the amount you're earning... it's not too much of an issue. And you never see the money, so it's not as if you've lost it. It just goes straight out of your paypacket anyway. [Recently completed BSc in Education and Maths]*

Additionally, interviewees referred to funding made available by educational providers as also enabling the take-up of studies.

### 6.2.5. Fear of overindebtedness

However, a few interview participants stressed their aversion to taking up loans, as this would put them in substantial debt. Some also mentioned financial commitments such as having to repay a mortgage or previous student loans as limiting their capacity to afford additional costs and/or debt, and therefore restricting their choices. These interviewees often expressed a preference for grants and lamented recent government cuts on bursaries.

*The only thing that would be in way [of starting] is the actual funding, the finances... I wouldn't consider [taking a loan] because I've been paying into my mortgage for a good few years and I wouldn't want to risk losing my house just for the sake of studying. [Considering BSc in English followed by PGCE]*

*Financial support would have been helpful, I know that the organisation used to give out grants to people that wanted to do courses... You also could apply for bursaries from a government agency, but they've cut all of them. [Studying part-time for Master in Library Information Services Management]*

### 6.2.6. Compatibility with other (welfare) benefits

Importantly, one of the interviewees spoke about the difficulties of accessing student finances as a disabled benefit claimant. This participant pointed to the trade-off between getting a student loan and continuing to receive the benefits he is currently on as preventing him from taking up studies. He also denounced the difficulty of obtaining financial help for those like him who are in receipt of Employment and Support Allowance (ESA) (Support Group) benefits as opposed to ESA (Work-Related Activity Group) ones, especially beyond undergraduate level.

*If I get this loan to pay for a course, ESA will take that into account as money that's come in. So they'll treat it as an income, even though it's a loan, and they'll take that amount of money off my benefits. Therefore I won't have any money to live on.*

Another interviewee in receipt of disability benefits additionally expressed concerns about governments' cuts in benefit provision, highlighting the importance of considering the interplay among different sources of funding in assessing individuals' capacity to sustain the costs of study.

### 6.3. Financial support from employers

Among PLs in employment, 57 per cent indicated that the qualification they had considered was related to the job they had at that time somewhat, or a great deal.

Still among PLs in employment, nearly two-thirds had informed their employer about their intention to study. This varied by employment status – those in full-time employment were more likely to say that their employer was aware of their plans than part-time workers. As expected, this proportion was also much higher among those who had considered/started studying to progress in their career (82 per cent) and much lower for those who had considered/started studying to change career (49 per cent) (see table below).

**Table 23: Proportion of prospective learners in employment reporting whether their employer was aware of their studying projects, by career motivations for studying**

	<b>Career change</b>	<b>Career progression</b>
Employer aware PL was considering qualification	49%	82%
Employer not aware PL was considering qualification	51%	18%
<i>Unweighted base</i>	<i>188</i>	<i>302</i>

Similarly, those looking for a career change were less likely to say that they knew their employer would help them to pay for some or all of their tuition fees (Table 24).

**Table 24: Proportion of prospective learners' in employment reporting whether they were aware of their employer's help with tuition fees, by career motivations for studying**

		<b>Career change</b>	<b>Career progression</b>
Whether employer would pay for all my tuition fees	Yes - I knew my employer would do this	12%	31%
	Yes - I knew my employer would NOT do this	51%	37%
	No - I did not know whether my employer would do this	36%	32%
<i>Unweighted base</i>		<b>161</b>	<b>242</b>
Whether employer would pay for some of my tuition fees	Yes - I knew my employer would do this	16%	36%
	Yes - I knew my employer would NOT do this	48%	30%
	No - I did not know whether my employer would do this	36%	34%
<i>Unweighted base</i>		<b>163</b>	<b>243</b>

Nearly four PLs out of ten stated that they did not know whether their employer would pay all of their tuition fees, a similar proportion knew they would not and only two PLs out of ten knew they would. These results varied by considered vs. started studying. Among PLs in employment, those who had started studying were more likely to (i) know whether their employer would pay all of their tuition fees, and (ii) know that their employer would do it. These results suggest that information about employers' support is inadequate in terms of both quantity and content/relevance.

Mirroring the above findings on costs being a key barrier, almost all interviewees considering or studying for a course funded by their employer discussed how this will be / had been essential to them being able to take it up. Employer funding was therefore a decisive enabling and motivating factor.

*If we have another economic downturn, that would change my mind... Because at the moment my company would fund it, so you'd go down that route, but if there was a downturn, it might be something that they withdraw funding from. [Employed full-time as customer services manager, considering NVQ Levels 3 and 4 in Customer Service]*

*I was thinking for a while to do this course, but my previous employer wasn't very supportive. So when I changed jobs, I had a chat with my new employer and they were very helpful. So that's how I decided to go on and start the course. [Employed full-time as caregiver, studying for NVQ Level 4 in caregiving sector]*

This was also seen in the quantitative data: 39 per cent of PLs that said they knew their employer would pay all of their tuition fees when considering studying went on to start studying, compared to 24 per cent of those that knew they wouldn't, and 19 per cent of those that did not know.

As for employer support more broadly, interviewees who were able to secure this type of funding were all considering / studying for qualifications that were necessary or beneficial for their current job and / or career progression. Many of them spoke about how this funding was available to their employer through staff development resources, highlighting the importance of these.

From the survey data, prospective learners considering Level 6 qualifications were more likely to know that their employer would not pay for their tuition fees than the rest of the population (Table 25).

**Table 25: Proportion of prospective learners' in employment reporting whether they were aware of their employer's help with tuition fees, by level of qualification considered**

		Level 3	Level 4 or 5	Level 6
Whether employer would pay for all my tuition fees	Yes - I knew my employer would do this	22%	25%	15%
	Yes - I knew my employer would NOT do this	34%	40%	48%
	No - I did not know whether my employer would do this	44%	35%	37%
<i>Unweighted base</i>		252	202	235

Those who did not have the opportunity to do a course sponsored by their employer underscored the importance of being able to retain their job as a source of income. For example, the availability of flexible courses and of flexible work arrangements, discussed below, facilitated continuing to work, whilst studying. One participant additionally mentioned being able to obtain an apprenticeship qualification as part of her job and thus continuing to receive a full-time employment income, which she found especially helpful.

*I think the fact that I had a full time job anyway, and I wasn't going to have to take a cut to my finances, was a massive thing. Because I'm on my own with my son, I couldn't afford to do anything which would reduce my household income, so I liked the fact that I was able to do the apprenticeship whilst earning a full time wage. [Employed full-time as university administrator, recently completed Level 3 Apprenticeship in Business Administration]*

## 6.4. Adequacy of financial support

Overall, 44 per cent of PLs agreed with the statement that financial support to study was inadequate for people like them (vs. 16 per cent who disagreed); however it is striking to see that 40 per cent neither agreed or disagreed. These results varied by:

- Whether respondents had started studying or not (those who started were more likely to disagree);
- Household income, with people from low-income households more likely to find existing funding mechanisms inadequate (see table below); and
- Age, with younger PLs more likely to find existing funding mechanisms inadequate;

However, these results are stable regardless of:

- The type of institution considered (HEI vs. other institutions, for those considering Level 4 or about qualifications);
- The level of qualification considered.

**Table 26: Proportion of prospective learners that agree or disagree 'Financial support to study is inadequate for people like me', by household income at the time considered/started studying**

	£14,000 or less	£14,001 to £21,000	£21,001 to £28,000	£28,001 to £41,000	£41,001 to £55,000	More than £55,000
Strongly agree	18%	20%	25%	15%	7%	12%
Agree	33%	22%	32%	29%	28%	26%
Neither agree nor disagree	40%	37%	35%	41%	42%	40%
Disagree	7%	15%	6%	10%	18%	16%
Strongly disagree	2%	6%	2%	5%	4%	7%
<i>Unweighted base</i>	140	130	125	178	158	159

## 7. In-depth analysis: Choice and information

This chapter addresses Research Questions 5: How do PLs make their choices about whether, how and where to study? What research do they do, and which sources of information do they use?

The structure is as follows:

- Information about curriculums and careers drawn from the survey (7.1);
- Information about funding drawn from the survey (7.2);
- Information drawn from interviews (7.3); and
- The perceived need for extra advice and information (7.4).

### 7.1. Information about curriculum/careers

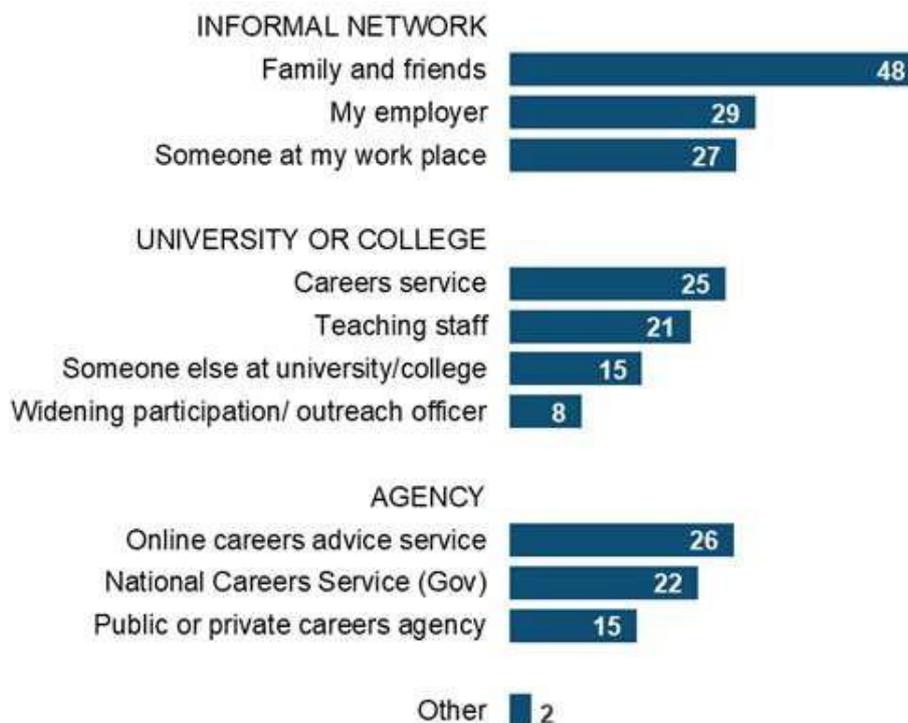
The enabling effect of information about curriculums and careers on study plans and the take-up of studies was moderate. To illustrate this approximately a third of PLs considered the availability of information about education opportunities to have facilitated or enabled their take-up of study, whilst just over one-fifth saw the availability of careers advice as an enabler. For both types of information, nearly half of PLs found this availability to have been neither an enabler nor an obstacle to them accessing post-18 education.

In the light of the above, it might be surprising to note that nearly two-thirds of PLs did not seek career advice or guidance, with similar proportions witnessed across different levels of qualification considered. However, PLs who had started studying and those considering studying part-time were less likely to seek advice, possibly because they were clearer about their motivations<sup>31</sup>. The most cited sources of advice and guidance were, by decreasing order of magnitude: family and friends (48 per cent), employers (29 per cent), colleagues (27 per cent), and career advice services, whether online, academic or governmental (26 per cent, 25 per cent and 22 per cent respectively) (see Figure 16). There were very similar results between those who had considered studying and those who had started. However, the latter group was less likely to have used government services (results not shown).

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<sup>31</sup> However, the data collected in this survey did not allow us to test this hypothesis.

**Figure 16: Where prospective learners sought careers advice or guidance (%)**



Base: Prospective learners who sought careers advice or guidance (273)

## 7.2. Advice/information about funding

Even more surprisingly, over 80 per cent of PLs did not seek financial advice or guidance. The following variables did not moderate the likelihood of seeking financial advice:

- The level of qualification considered;
- Whether PLs had started studying (as opposed to just considered);
- Income: although PLs from the lowest income group were the most likely to have sought financial advice, no meaningful pattern was found between other income groups and the likelihood of seeking financial advice (results not shown);
- The type of provider.

PLs who sought financial advice used a range of sources, rather one source in particular. The most cited sources of financial information/advice were the university/college where PLs considered/started studying (36 per cent), family and friends (27 per cent), employers (25 per cent) and online financial advice services (24 per cent).

Overall, the sources of financial information used did not vary much by income or whether PLs had started studying (as opposed to just considered studying). However:

- PLs who started studying were more likely to have used online financial advice services than those who just considered studying;
- PLs from higher income households were more likely to ask their family, friends or employers than PLs from lower income households.

### 7.3. Advice/information: qualitative findings

Most interviewees researched information online as a first port of call, including general searches, education providers' websites and government websites. This applied to information pertaining to both the courses and qualifications offered by different providers, ranging from HEIs to FE colleges and private providers, and the availability of funding. Some interviewees had also accessed online information and guidance on recognised qualifications provided by relevant professional advisory bodies such as the British Dyslexia Association and the Chartered Institute for Librarians. A few participants had additionally ordered prospectuses, contacted staff (e.g. university lecturers; university and college advisors) via telephone or email and/or spoken to them in person. The extent to which interviewees found staff to be helpful varied among providers, with this informing decision-making.

*[I chose this provider because] one, I could contact them. Because a lot of them just didn't answer the phone, or were really difficult to get hold of... They said you need to come in and talk to us, come to an open day... [This one] just realised ... he's done his research, he knows what he wants, this is what you need to do. They were very straightforward.*

Others attended providers' open days, which they found especially useful.

*I loved every minute of [the open day]... Everyone was very helpful, they took you on tours... you sat in a class as if you were doing a course there. It was really good... I got everything I needed. You do get a lot of info online but obviously you can't directly ask a question, unless you want to wait 24 hours for someone to get back to you.*

Personal contacts who had studied for the qualification considered or were working in the sector of interest (mostly employers and colleagues but also friends and family members) were also substantially relied upon as a source of information. These were particularly

informative and trusted sources, and therefore played a significant role in informing decisions.

*I was worried that [doing the course would have been] quite a risk because it's quite a lot of money. I was worried that 'was it actually worth it in the end?' but I spoke to some colleagues who said it was worth it because they'd all got promotions... I didn't speak to anyone who said it was a waste of time.*

*[Employed as university librarian, studying for [Master in Library Information Services Management](#)]*

Perceptions of whether there was enough information available in order for them to make an informed decision varied among participants, depending mainly on the level of detail needed. Many felt there was not enough information that was easily accessible, for example online or through their employer. This was especially problematic for those with health conditions and/or caring responsibilities. These participants stressed the need for more exhaustive information regarding the practicalities of courses such as number of hours and timing of activities, as these would substantially affect their capacity to study and were critical to decision-making.

*I tried to find out what the hours are... so I could work out how it would affect my health, but I can't actually find that out. Because if it was too early in the morning I wouldn't be able to do it... So I need to find out the times... when I need to be in... because I can't travel on my own... [this information] would really be needed beforehand but you can't get the stuff until after you start the course.*

*We had course information but we didn't have the timetable confirmed until we have actually enrolled and registered this week. So if I'd have known a couple of years ago what my hours at university would have been, I may have considered it a lot earlier. I was thinking I wouldn't be able to fit it around my children.*

Interviewees additionally pointed to a number of aspects that would help them in taking a decision and support them throughout their studies:

- more information from providers about the jobs that the course can lead into upon completion;
- more information from employers about the experience and qualifications required to access certain jobs and for career progression;
- a government website / database for over 18s to aid with decision-making, detailing the financial help that might be available;
- an adults' careers advice service;
- being able to refer to '*a human point of contact*' for information and advice on courses and qualifications;
- especially for those taking online / distance learning courses, having face-to-face 'support groups' of people who have gone or are going through mature study and can share their experiences and offer advice;
- online forums where one can exchange views and experiences with others who have taken a certain course.

#### **7.4. Need for extra advice**

Just a quarter (27 per cent) of PLs agreed that they needed more advice choosing what to study, compared to 39 per cent disagreeing. This varied by:

- considered/started studying: those who started studying were less likely to feel they needed more advice than those who just considered studying;
- age, with PLs who were aged under 35 when considering study more likely to agree they needed further advice choosing what to study than those aged 35 or over (36 per cent compared to 19 per cent);
- qualification: those who considered/started studying for a Level 3 qualification were more likely to state they needed more advice than those who considered/started studying for a higher qualification.
- study mode, with those who considered/started studying full-time more likely to agree that they needed more advice than those who considered/started studying part-time.

## 8. In-depth analysis: Access and flexibility

This chapter addresses Research Questions 6: To what extent did PLs consider personal circumstances / competing responsibilities a barrier? It considered two subgroups: (i) those with work commitments and (ii) those with family commitments<sup>32</sup>.

The chapter explores:

- The specific problems encountered by these two subgroups (8.1); and
- Possible solutions to allow them to enter post-18 education (8.2).

### 8.1. Access for those with work and family commitments

This study found ample evidence that post-18 education can be hard to combine with work and family commitments. Asked whether they agreed that the amount of time required to study can be an obstacle to post-18 education, thirty-seven per cent of PLs agreed (making time one of the main obstacles to post-18 education). Conversely, 22 per cent of PLs stated that the time needed to study made studying easier.

#### 8.1.1. Work commitments

The questionnaire explored this multiple times, with results remarkably stable. For example:

- Thirty-five per cent of those in employment considered work commitments to be, balanced against possible support from an employer, a barrier to study. This proportion was also higher for those who only considered entering post-18 education compared to those who started. These findings confirm that the incompatibility between work and study deters a large number of PLs from entering post-18 education.
- Thirty-four per cent of PLs agreed that they do not have enough time to commit to studying (although this is not necessarily related to work commitments). This proportion was higher among those who had only considered studying as opposed to started studying.

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<sup>32</sup> The needs of PLs from disadvantaged socio-economic backgrounds – another key subgroup – were considered in chapter 6.

## 8.1.2. Family commitments

Asked about whether they thought that balancing study with family commitments/family support had been a barrier or an enabler to their take-up of studies, 24 per cent identified family as having been an enabler, and 31 per cent as having been a barrier. On balance, therefore, PLs, as a whole, considered family to be neither a major obstacle nor a major facilitator.

Yet, almost half of PLs (47 per cent) agreed that family commitments made them think twice when considering studying for a new qualification, as opposed to 28 per cent who disagreed. As expected, this varied by caring responsibilities, with more time spent caring for others resulting in a greater likelihood to agree. Fifty-five per cent of those caring for 10 hours or fewer per week and 67 per cent of those caring for more than 10 hours per week concurred with this statement. However, this did not vary by household income, nor by mode of study (full-time vs. part-time).

In interviews, all of those who had caring responsibilities discussed how these were their first priority. Such responsibilities significantly constrained participants' time and mobility, thus substantially affecting their decisions over whether, where and how to study.

*[My mother-in-law] has good days and bad days... some days I just provide her with meals, make sure she's fine and comfortable... on bad days it's maybe 2-3 hours a day...I don't have the leisure time like most university students. [Carer for mother-in-law and 6-year-old child]*

*That's the first thing for me, it's the location, and I say that because I've got a family, I've got a child, I've got to try and fit this all 'round that you know, I can't just disappear for a week, two weeks, or something.*

As detailed in section 8.2., flexible learning was preferred where respondents / interviewees had competing family commitments so that study could be fit around these. Changes in caring responsibilities due, for example, to children growing up and becoming more independent also functioned as important enablers, triggering in some cases the decision to take up studies.

*Obviously [now that my daughter is 22] I have more time to be able do the things that I want to look at, rather than caring for a young family and trying to run the home and the family and working on a qualification... When children are younger it makes it difficult to make that commitment and have spare time to be able to do it.*

*My child's older now... so he doesn't need to be looked after anymore as such, so we can kind of be study buddies.*

## **8.2. Solutions to allow combining study and other commitments**

### **8.2.1. Course flexibility**

Nearly half (49 per cent) of PLs agreed that people running post-18 courses consider the difficulties of combining study, work and family commitments, compared to 13 per cent disagreeing. The proportion of those who agree was higher for those who had started studying (56 per cent) and lower for those who had just considered studying (47 per cent). However, this did not vary by other socio-demographic characteristics.

PLs viewed this flexibility positively: 39 per cent felt the ease of access of the course (e.g. time, distance or flexible learning) made studying easier (compared to 20 per cent harder). PLs identified the ability of a course to facilitate distance or flexible learning as one of the main reasons for selecting a certain educational provider, with 35 per cent of respondents citing this motivation. To understand better what flexibility looks like for PLs themselves, we asked this question to interview participants who referred to this as an important aspect. Participants mainly spoke about flexibility in terms of:

- flexible hours (discussed below); and
- remote / online learning (discussed in Chapter 9.4.).

### **8.2.2. Flexible hours**

Flexibility of hours was crucial to most participants. Some highlighted how being able to study in their own time, for example early in the morning, in the evening or during weekends, and at their own pace, doing sections of coursework whenever they could, was essential to juggling study, employment and family, including caring commitments.

*At the Open University they give you a set time when you need to complete things but you can do the studying in your own time. So if you want to get up at 3am you could go and do an online lecture and then do the essays afterwards. So its very much doing it at your own pace... and that very much appeals to me.*

*I found that was quite easy, doing it online. Because you can do it at night when [the children] are in bed, and get up in the morning early before they're up for school.*

This type of flexibility was also especially critical for those with health conditions, which limited their ability to study long hours or at certain times during the day, for example early mornings. The importance of having flexible hours was emphasised by participants not only in relation to course-work but also of contact time with teaching staff. Distance learning facilitated this type of flexibility, as well as flexibility of location (see below). Quite a few participants were considering or studying at the Open University because of this reason, although some mentioned restricting their choice to this provider, as they were not aware of distance learning courses being made available by others. Provision of flexible hours for study, contact with staff and assessment was, however, also valued highly in face-to-face or mixed-mode learning, especially for those qualifications requiring practical training and thus an element of face-to-face learning.

*I can stay up late to do my assignments, things at home that I can control. But something like the classes and the timing would be difficult for me because in the afternoon I have to pick up my son... That's always the thing with me, I don't mind, but I need to work around my family.*

*There would be some form of teacher training and so I know if I did that I would have to cut down my hours at work for the time that I was actually in the classroom... but in the brief chats that I've had with the lecturers there they are saying they are quite flexible because they want people in the profession.*

### 8.2.3. Employer support

Around a third to two-fifths of PLs in employment did not know whether their employer would support them through paid or unpaid time off, or offering flexible hours (see Table 27). Among those who knew:

- almost twice as many respondents knew that their employer would allow them to work flexible hours so they could study as respondents who knew that their employers would not give them this flexibility.
- There was an equal divide between respondents who knew their employers would and would not give them unpaid time off.
- A vast majority of respondents knew that their employers would not give them paid time off to study.

**Table 27: Proportion of prospective learners' in employment reporting whether they were aware of their employer's support, by type of support**

	Give paid time off	Give me unpaid time off	Allow working more flexible hours
Yes - I knew my employer would do this	25%	31%	44%
Yes - I knew my employer would NOT do this	40%	29%	25%
No - I did not know whether my employer would do this	35%	39%	31%
<i>Unweighted base</i>	727	724	729

These proportions were similar for those who had considered studying and for those who had started. However, the more closely aligned the qualification considered with the respondent's existing job, the more likely they knew they could get paid time off (see

Table 28), unpaid time off and flexible working hours. The proportion of those knowing their employer would support them was also higher for men, people with higher household incomes and people working full-time (although the level of statistical significance varied for the latter two subgroups).

**Table 28: Proportion of prospective learners in employment reporting whether they knew their employer would offer them paid time off, by extent to which they considered or started qualification was related to job**

	A great deal	Some-what	A little	Not at all	Total
Yes - I knew my employer would do this	35%	26%	22%	11%	25%
Yes - I knew my employer would NOT do this	35%	39%	34%	51%	40%
No - I did not know whether my employer would do this	30%	35%	44%	38%	35%
<i>Unweighted base</i>	292	126	124	185	727

Interview participants identified competing employment commitments and a general lack of time as barriers to the take-up of studies. Consequently, interviewees considered employers' willingness to arrange for flexible working hours and/or time off for study as a significant factor, which enhanced the capacity to fit study alongside work and helped to facilitate its take-up. In line with survey findings, some, although not all, who were studying for qualifications directly related to their current job especially discussed receiving this type of support from employers. Some interviewees additionally pointed to company provisions such as time off in lieu (TOIL) for antisocial hours and government ones such as study leave entitlement for nurses' CPD as being particularly helpful.

*My employer offers me study leave, which is really useful. It's only a couple of days a year, but it means that when I've got an assignment due I can take time off... We also get time off in lieu, so because I work evenings and weekends I get a day off in the week during term-times... and that's really useful because then I have a whole day off to focus on the studies.*  
 [Employed full-time as university librarian, studying for Master in Library Information Services Management]

*I'm entitled to study leave, in the year I can ask for a week or so to help me. We [nurses] are all entitled to study leave, to improve ourselves, to learn the latest technology, policies.*  
 [Employed part-time as Logistic Nurse, considering Master in Nursing Education]

Some also pointed to changes within companies' management 'culture', with more emphasis on staff development, and the value of support structures such as personal development plans.

*There's no use putting someone out there, if you don't provide them with the right training... It's getting the people in the workplace geared up properly... Everybody now has what we call a 'Development Plan'... It's taken a culture change at the top, we've had to say 'you have to put your hands in your pockets if you want to do your job properly'. [Employed in IT, studying for ITIL certification]*

#### 8.2.4. Family support

In interviews, the majority of participants also spoke of their parents, partners and sometimes children as key sources of support. Most mentioned receiving practical support from family members with caring responsibilities (e.g. dropping / picking up children at / from school) and household chores.

*My husband drops [our son] off to school, because I start [working] early in the mornings... so we have this arrangement. We've always managed between ourselves... and his job is quite flexible as well, he's at a position where he can manage to work around his time.*

A few, whose parents, partners or children were able to help with course-work, also pointed to this as being especially valuable. Generally, participants referred to the ability to draw on one's social networks (including family members, employers and colleagues as well as friends) for help with course-work and assignments as being particularly helpful.

*My father has got a PhD in physics which is very maths oriented and he's very maths oriented, so he helped me out quite a lot because he was a source of information that I could call on at any time. Whereas lecturers, some of them were great and they'd say just get in touch, but others would say you can't phone me this time and you can't phone me that time.*

Although participants generally referred to their families as being supportive of their intention to study and helping them to manage competing commitments, it is important to stress that most did not want to place an excessive burden on family members and preferred not to ask for financial support as they were used to their economic

independence. Only one participant, among the youngest and below their 30s, obtained financial support from their family. It is also worth noting that not all interviewees' families were supportive, with the lack of emotional and practical support becoming in these cases an additional barrier.

## 9. In-depth analysis: Provision

This chapter addresses Research Question 7: What other barriers did PLs face? Do existing provisions meet the needs of PLs?

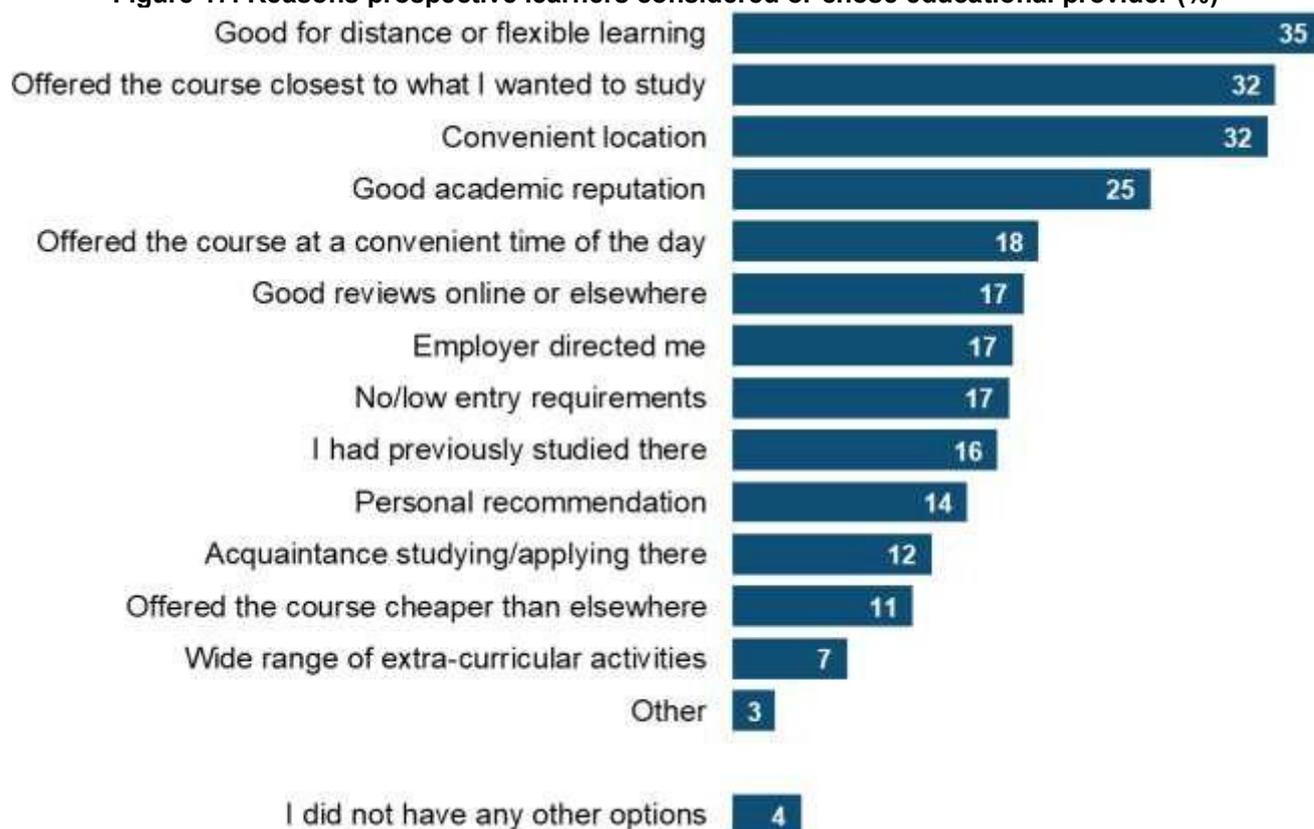
It explores:

- The perceived alignment between supply and demand (9.1);
- Regional variations in terms of provision (9.2);
- Education providers' accessibility by disabled learners (9.3);
- The demand for online learning (9.4); and
- Other types of flexibility (9.5).

### 9.1. Alignment between supply and demand

Among the main reasons cited by PLs for selecting an educational provider were those related to access, with 35 per cent of respondents mentioning choosing a provider because it was 'good for distance or flexible learning' and 32 per cent mentioning its 'convenient location'. These reasons were followed by course content ('offered the course closest to what I wanted to study' - 32 per cent), and reputation/reviews ('good academic reputation' – 25 per cent) (Figure 17).

**Figure 17: Reasons prospective learners considered or chose educational provider (%)**



18% chose their learning provider for convenient timing, 32% for convenient location, 25% for reputation, 17% were directed by their employer, 14% had a personal recommendation, 11% went for the cheapest course, 7% chose the course for its extra-curricular activities.

Base: Prospective learners who had thought about the type of educational provider to study through (952)

## 9.2. Regional variations

Thirty-one per cent of PLs felt that the location of institution (e.g. distance from home/work) made it easier to study (compared to 21 per cent harder), an opinion which did not vary significantly by socio-demographic characteristics, including whether the participant currently lives in an urban or rural area<sup>33</sup>.

The interviewees who discussed the quality of provision most extensively were:

- living in rural areas;
- living in areas where the programme of interest was not available; and
- those living in areas with a poor public transport network.

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<sup>33</sup> PLs currently living in urban areas were more likely to view the location of the institution as an enabler to study than rural areas (32 per cent vs. 24 per cent), but this difference was not statistically significant

(p=0.09)

Correspondingly, local availability as well as online / distance learning provision functioned for interviewees as enablers. As detailed below, however, online or distance learning was not always an option as some qualifications required face-to-face training and/or assessment.

### 9.3. Accessibility by disabled learners

Accessibility is obviously a key issue for people with disabilities, health conditions and learning difficulties – and this theme emerged in interviews. While participants recognised the availability of support services and targeted funding for some disabled students, they still felt that the support and information available was not enough. In particular, all of the three participants who reported a physical or mental health condition found it difficult to access comprehensive information online about aspects critical to their decision-making and planning. They especially stressed the need for more detailed information from providers on the practical aspects of courses, such as the timing of activities, and on the range of support in place for those with different conditions. Additionally, they pointed to a dearth of funding and support, for example to enable travelling (some could not travel on their own and needed to be accompanied) or to cover the costs of communications assistants. One interviewee with a deafness condition also highlighted how teaching practices often do not account for disabilities such as his, for example using videos with no subtitles, thus undermining learners' capacity for learning and attainment.

### 9.4. Online learning

As for flexible hours, interviewees also discussed flexibility of location as an enabling factor. Again, distance and online learning were often valued due to the greater flexibility they afforded in this respect. This was especially important for interviewees living in rural areas, who often struggled to find a local provider, which offered the course(s) they were interested in studying. Those with mental and/or physical health conditions, especially where these limited their ability to travel on their own or to communicate with others, also considered it an advantage being able to study remotely.

*[I chose to study at the Open University so] I could do it at home.. because getting out and about is difficult for me. It's quite remote where I live and I didn't drive back then... so I thought I would do it at home... And [the agoraphobia] stops me quite a lot.*

*I could use a distance learning provider and do most of the course at home... I wouldn't need to pay for communication support... I do not enjoy studying in a class or group environment and will only do so if I have to.*

The option to study remotely was however not available to everyone, as some qualifications necessarily involved an element of face-to-face practical training and/or assessment. Adding to this, not everyone was in favour of online or distance learning. Some participants mentioned a personal preference for face-to-face learning as being more motivational and enabling more regular contact with other students and teaching staff. A few interviewees also pointed out, importantly, that employers do not always grant recognition to online and distance-learning courses.

*[Studying face-to-face] is important certainly for being able to get feedback easily and also to actually have someone to hold me accountable to do the work... When you study online in your own time, you can say you're too tired and won't bother, whereas if you're actually going somewhere to study you kind of have to do it because someone is like 'why haven't you done the work'.*

Finally, it is worth noting that even interviewees who valued distance and online learning stressed the importance of having 'face-to-face' point of reference that they could access for information or if they experienced any problem, student 'support groups', and in some cases an element of face-to-face learning.

*I could either do it online or I could do it in lectures... or a combination of the two... I'd probably try and go with the combination of the two because if I could do it online that would give me the flexibility... but likewise I would like to know if I need to talk to the lecturer or if I needed some support with something... I can have [that].*

## **9.5. Other types of flexibility**

Another key aspect related to flexibility and the preference for online courses was the possibility to accumulate credits, take breaks from studying and eventually pick the course up again where one had left it.

*[At the Open University] you didn't have to do [the course] three years in a row... you can do one year, get your credits then take a little break and then do the next year... so that appeals to me.*

A few interviewees also pointed to the usefulness of having shorter 'piecemeal' courses that can function as 'building blocks', offering the possibility to acquire credits for the assignments undertaken. The availability of short courses was especially welcome, with some mentioning not being able to take up studies if the qualification required was too long.

Online learning was additionally valued for the opportunity it provided to switch on and off study and assignments at one's convenience.

As online / distance learning was largely considered to facilitate studies, some participants found the lack of equal recognition of distance learning qualifications by employers to be a barrier.

*I suppose [distance learning] could be, it probably would have been helpful. But there is no point studying in that way because law firms won't give you jobs from it.*

Finally, participants' accounts highlighted the importance for students with competing family and employment commitments of having more flexible assignment deadlines. For those participants whose funding was tied to course-work completion this was particularly crucial.

## Conclusions

### What proportion of the adult population have considered, are currently considering, or may consider, entering some form of education?

**Post-18 education is in high demand in the British population.** Approximately a third of the general population had considered *or* started studying for a new qualification in the previous five years. Approximately a fifth of the population had considered *and* started studying for a qualification. These results are hard to validate given the lack of existing statistics on the subject; however, they are higher than expected. While some sampling error and/or measurement error may be inflating these results, they still suggest that there is significant interest in post-18 education in the British population. There are around 34 million people aged 20-60 in the UK<sup>34</sup>. To the extent that the results found in this study are correct, nearly 10 million adults have considered or started studying in the previous five years.

### What demographic characteristics did PLs have compared to those who were not considering any form of education?

**Young people (with a peak among 25-34 year-olds) and women were more likely to consider taking up post-18 education.** The former result is in line with a recent report from Universities UK, which found that 'lost learners' (i.e. those who considered PT study since 2010 but did not start) were most likely to be aged between 25-44 years of age.

**PLs were more likely to have children under the age of 18 and to have caring responsibilities outside children than those who were not considering studying.** This result was more surprising. However, it is to be treated with caution, as key socio-economic variables (e.g. household income) were not controlled for. The robustness of this finding requires further research.

**Those with relatively more favourable socio-economic circumstances were more likely to consider post-18 education.** *Compared with those who were not considering studying*, PLs were more likely to possess some form of economic and social capital. Indeed, they were more likely to be in employment, have a high income, and have either a parent and/or a partner with a degree. These results are in line with previous studies on the profile of the student population.

**The qualifications considered and taken up were lower than the highest qualifications already held by the general population.** The boosted survey in this

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<sup>34</sup> ONS, Census data 2011

study focused on mature adults considering or having started a Level 3 qualification or above. Results demonstrate that this group shows an equal split between those who had considered or started studying for a Level 3 qualification and those who had considered or started studying for a Level 4 or above qualification. In comparison, the Labour Force Survey for England indicates that, in the working population (aged 19-59/64), this ratio is one-third/two-thirds<sup>35</sup>. However, the latter result concerns the *highest qualification* held by survey respondents.

Although this result may suggest that a significant proportion of PLs were less qualified than the average person of working age in the population it also supports the hypothesis that mature students use post-18 education to make 'horizontal' career decisions, i.e. to get jobs that are different from their current or previous job, but do not necessarily require a higher qualification.

## **When making decisions, what were the overarching aims / goals of PLs?**

**Professional considerations drove the decision to take up post-18 education.** Over three-quarters of prospective learners considered studying for professional reasons. The most cited reason was the willingness to progress in one's current job; however, sizeable groups considered studying as a way to get a new job, to change career, to earn more money (or get a pay raise) or to develop one's professional network. Conversely, only a small fraction of respondents considered studying because they were unable to get a job.

The exact motivation of PLs (i.e. progress in current job vs. change career) depended on how established prospective learners already were. For example, studying in the hope of getting a job, or changing job, was more prevalent among young people and people with lower incomes. Conversely, progressing in one's career was more prevalent among people with higher income and those aged 35+.

**As a result, post-18 education was often relatively vocational, short and combined with an existing job.** Overall, the subject of the most recent qualification prospective learners considered or started studying for tended to be technical, practical or vocational rather than more 'academic' or 'abstract'. Correspondingly, more than half of respondents had started or considered studying in a further education college, with an employer (e.g. as apprentice), with a private training provider or a local authority. This should not obfuscate the fact that over four in ten respondents had considered studying, or started studying, in a higher education institution.

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<sup>35</sup> <https://www.gov.uk/government/statistical-data-sets/fe-data-library-qualifications-in-the-population-based-on-the-labour-force-survey>

The study also found that over two-thirds of prospective learners had considered or had started studying part-time. Half of prospective learners expected to finish their studies within two years.

**However, professional, personal and educational motivations were inextricably linked.** In line with the objectives of the study, most questions about motivations focused on *professional* motivations specifically. However, professional, personal and educational motivations were deeply interlinked. Around half of survey respondents indicated that they had considered or started studying for both professional and personal/educational reasons. Likewise, most interviewees gave both professional and personal/educational reasons for wanting to study.

**In some cases, life events and personal circumstances triggered the decision to enter post-18 education.** As with many life-changing decisions, a mix of intrinsic and extrinsic factors triggered the decision to study. While the former included personal plans and ambitions, the latter included personal events and circumstances such as the loss of a job or significant changes in caring responsibilities (e.g. children becoming more independent). Some of these new personal circumstances could have policy implications if the decision to enter education is made at a time of personal/emotional vulnerability or without sufficient preparation and planning.

**Professional reasons also motivated those who consider/start studying PT.**

However, the decision to study PT specifically was often constrained by existing family and professional commitments, as well as the need to retain an income.

**What barriers did PLs face when choosing whether to enter education? What enablers / facilitators were available that assisted with the choice of whether to enter education and of what qualifications / level of education to choose?**

**Key obstacles** to studying for PLs overall included: (1) all types of study costs; (2) the amount of time required to study; and (3) the balance with work commitments.

**Key enablers** included: (1) the match between the available courses and the respondents' interests; (2) the flexibility of the course; (3) the location of the course; and (4) the availability of information about the course and the application process.

Whether, and the extent to which, a factor was considered an obstacle or an enabler varied by subgroups:

- Those who had started studying were more likely to see each factor as an enabler and less likely to see it as a barrier than those who had not started studying.

- PLs that had considered or started studying in a HEI were more likely to find tuition fees and the cost of equipment, books and travel an obstacle than those considering studying in any other institution. However, they were not less likely to start studying.
- PLs that had considered or started studying for higher education qualifications were more likely to find time an obstacle to studying. However, they were not less likely to start studying.
- PLs with caring responsibilities were less likely to consider ease of access and location of education providers an enabler, and more likely to consider balancing studying with family responsibilities an obstacle. PLs with caring responsibilities were less likely to start studying<sup>36</sup>.
- PLs with lower household income were more likely to consider equipment costs an obstacle. PLs with higher income were equally likely to start studying as PLs with lower income. However, this result should be treated with caution, as income was not equivalised.
- Young PLs were more likely to view living costs as a barrier, but also more likely to consider financial support an enabler. The youngest and oldest PLs were less likely to consider time to study an obstacle. Young PLs were not more likely to start studying.
- Male PLs were consistently less likely to see each factor an obstacle; however, women were more likely to start studying.

## To what extent did PLs consider the cost of study as an enabler or a barrier?

**Study costs – in particular tuition fees – were the main obstacle to studying.** Forty-four per cent of PLs indicated that tuition fees were an obstacle to their take-up of post-18 education. This figure is the same as in the above-mentioned UUK report. Thirty-seven per cent of PLs considered not being able to afford the costs of living while studying as an obstacle. As a comparison, 42 per cent of the ‘lost learners’ studied in the UUK Report identified costs of living as an obstacle.

**PLs considered post-18 education was worth the investment.** Sixty per cent of PLs expected to benefit financially from post-18 education. This result is in line with previous studies on the expected financial returns of education.

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<sup>36</sup> This does not contradict an earlier finding that people with caring responsibilities were more likely *to have considered* or started studying than people without caring responsibilities.

## What financial support did they consider?

**Slightly more than half of PLs intended to get financial support to cover some or all their tuition fees.** Unsurprisingly, PLs from low-income households were more likely to consider/ask for support. The most cited sources of financial support were the Student Loans Company, employers and the government.

**PLs did not consider student loans the panacea for the barrier of tuition fees.**

Although two-thirds of PLs knew about student loans, only 17 per cent applied for one. Loans covering living expenses were both less known by PLs (half of PLs knew about them) and less used (10 per cent applied for one).

**An overwhelming majority of PLs consider existing financial support mechanisms inadequate.** Strikingly, young people and PLs from low-income households – who would be expected to be the main beneficiaries of these mechanisms – were more likely to find them inadequate. This report identified two problems: (i) the quality/relevance of information about funding; and (ii) the fear of becoming overindebted.

**Information about funding seems inadequate.** A large proportion of PLs did not know whether they would be eligible for a student loan or whether their employer would be able to cover all or some of the tuition fees or to give them paid time off to study. Interviews echoed this uncertainty. Many interviewees indicated that they had a very limited understanding of student finances and that they were not sure about their eligibility for grants or loans.

**PLs perceived the cost of financial support as excessive.** Some forms of financial support come at a cost, and these costs can be perceived as exceeding the benefits. Some interviewees feared they would become over-indebted; others indicated that some forms of support were incompatible with receiving other types of (welfare) benefits, such as incapacity/disability benefit.

## How did PLs make their choices about whether, how (e.g. FT or PT / long distance / accelerated / other modes of learning) and where to study? What research did they do, and which sources of information did they use?

**The enabling effect of information on study plans and the take-up of studies was rather moderate.** The main sources of information for survey respondents were family and friends, employers, colleagues and university services (for financial advice specifically). Interview respondents cited the web as a main source of information but also mentioned family and friends, employers and colleagues as trusted sources of information.

**Surprisingly, high proportions of PLs did not seek advice.** Interviewees regarded the quality/relevance of information as sub-optimal rather than the volume of information. This was especially the case among those with special circumstances, including health conditions and/or caring responsibilities. As a result, a relative minority of survey respondents agreed that they needed *more* information. However, younger learners, learners considering lower qualifications, those considering full-time education and those who had not started studying at the time of the survey were more likely to need extra advice.

## **To what extent did PLs consider personal circumstances / competing responsibilities a barrier?**

**Work and family commitments can hinder post-18 education.** The proportion of those finding family commitments a barrier to study increased significantly with the time spent caring for other people, as expected. Nearly two-thirds of PLs caring for more than 10 hours a week said that this responsibility made them think twice before taking up post-18 education. This result is broadly in line with the findings of the UUK report. Caring responsibilities are often the first priority of prospective learners. It is also often a key factor influencing whether to study, where to study and how to study. PLs often mentioned changes in caring responsibilities as triggers for considering taking up studies.

**Accessible and flexible provision can enable post-18 education, as can more flexible work arrangements.** Unsurprisingly, given the difficulty of combining study and other commitments, the most important enablers cited were flexibility and location. Employers have a key role to play – for example, through the provision of flexible working hours. These conclusions are in line with those of the UUK report.

## **What other barriers did they face? Do existing provisions meet the needs of PLs?**

**Overall, PLs primarily selected their education provider based on ease of access, followed by course content and the reputation of the provider.** Most PLs felt the location of their provider made it easier to study, but some felt it made it harder. There was some evidence that this was particularly the case for those in more remote locations.

**The flexibility afforded by online and distance learning were particularly valued.** This was especially the case for those who would otherwise have difficulty accessing education locally. However, some participants expressed a preference for face-to-face education, or having some in-person contact when needed. Interview participants noted that some qualifications required face-to-face training or assessment, and some expressed a concern that employers do not give the same credibility to online or distance courses.

**PLs with a physical or mental health condition did not always have their specific needs sufficiently addressed.** These needs included information related to accessibility and specific funding and/or support.

# Appendices

# Appendix A - Boost questionnaire specification

## 1.1 Demographic questions

{ASK ALL}

demogs\_gender

Are you...?

1. Male
2. Female
3. Other (Please specify)
4. Prefer not to say

{ASK ALL}

demogs\_DOB

Please enter your date of birth

DD/MM/YYYY

{ASK ALL}

demogs\_education

What is the highest educational level that you have achieved to date?

1. No formal education
2. Primary
3. Secondary school, high school, 6th form/ college, GCSE's, ALevels, BTEC, NVQ levels 1 to 3, etc.
4. University degree or equivalent professional qualification, NVQ level 4, etc.
5. Higher university degree, doctorate, MBA, NVQ level 5, etc.
6. Still in full time education
7. Don't know
8. Prefer not to answer

## 1.2 Screening questions

{ASK ALL}

ConsHow [MULTICODE, RANDOMISE 1...10]

The next few questions are about times you have considered studying for a new qualification in the <b>last {IF Age > 22 "5 years"; IF Age = 21 "4 years"; IF Age = 20 "3 years"; IF Age = 19 "2 years"; IF Age = 18 "year"}</b>.

In the <b>last {IF Age > 22 "5 years"; IF Age = 21 "4 years"; IF Age = 20 "3 years"; IF Age = 19 "2 years"; IF Age = 18 "year"}</b>, have you done any of the following when considering studying for a new qualification?

Please select all that apply

MULTICODE

1. Got information on courses (online or from other sources)
2. Got information about an education provider (online or from other sources)
3. Spoken to friends or family members
4. Spoken to my employer
5. Spoken to an expert (such as career's advisor, jobcentre, or former teacher)
6. Spoken to an education professional
7. Attended an open day
8. Attended a fair

9. Requested information from an education provider such as a prospectus
10. Applied for a course
11. None of these [EXCLUSIVE]
12. Not applicable – I have not considered studying for a new qualification [EXCLUSIVE]

[NO DK/REF]

{IF ConsHow = 1...10}

ConsWhat [MULTICODE]

And still thinking about the times in the last {IF Age > 22 "5 years"; IF Age = 21 "4 years"; IF Age = 20 "3 years"; IF Age = 19 "2 years"; IF Age = 18 "year"} that you took those actions when considering studying for a new qualification...

Which, if any, of the following qualifications were you considering studying for?

Please select all that apply

1. **Level 3 qualifications**, for example:
  - *A-Levels or AS Levels*
  - *BTEC level 3*
  - *Level 3 Certificate / Diploma / Award / NVQ*
  - *Level 3 national diploma or certificate*
  - *International Baccalaureate diploma*
  - *Level 3 English for Speakers of Other Languages (ESOL)*
  - *Access to higher education diploma*
  - *Advanced apprenticeship*
  - *Foundation diploma*
  - *Applied general*
  - *Tech level*
  
2. **Level 4 qualifications**, for example:
  - *Level 4 Certificate / Diploma / Award / NVQ*
  - *Higher National Certificate (HNC)*
  - *Certificate of Higher Apprenticeship or Higher Education (CertHE)*
  
3. **Level 5 qualifications**, for example:
  - *Level 5 Certificate / Diploma / Award / NVQ*
  - *Diploma of higher education (DipHE)*
  - *Higher National Diploma (HND)*
  - *Foundation degree*
  
4. **Level 6 qualifications**, for example:
  - *Undergraduate degree/degree apprenticeship*
  - *Level 6 Certificate/ Diploma / Award / NVQ*
  - *Graduate diploma or certificate*
  
5. None of these [EXCLUSIVE]

[NO DK/REF]

{IF ConsWhat = 1...4}

ConsPTFT

And still thinking about the times in the last {IF Age > 22 “5 years”; IF Age = 21 “4 years”; IF Age = 20 “3 years”; IF Age = 19 “2 years”; IF Age = 18 “year”} that you considered studying for those qualifications...

Were you considering studying full time, part time, or both full time and part time?

By **full time** we mean courses that involve mostly face-to-face learning for at least 24 weeks of study or placement per academic year.

By **part time** we mean distance or online learning, or courses that involve mostly face-to-face learning for less than 24 weeks of study or placement per academic year.

1. Full time
2. Part time
3. Both full time and part time

[NO DK/REF]

{IF ConsPTFT = 1 AND Age = 21...25}

**ConsWhen**

And now thinking about the **the most recent** time that you considered studying for any of those qualifications...

How old were you when you were considering studying for this qualification?

RANGE 11...25

[NO DK/REF]

HARDCHECK: IF ConsWhen > Age “The age you entered is greater than your current age. Please check your answer.”

**ConsStudy [DV]**

COMPUTE ConsStudy = 2

IF ConsWhat = 1...4 ConsStudy = 1

IF ConsPTFT = 1 AND Age = 18...20 ConsStudy = 2

IF ConsPTFT = 1 AND ConsWhen = 11...20 ConsStudy = 2

{ASK ALL}

**StudWhat [MULTICODE]**

And now thinking about qualifications you have **started studying for** in the last {IF Age > 22 “5 years”; IF Age = 21 “4 years”; IF Age = 20 “3 years”; IF Age = 19 “2 years”; IF Age = 18 “year”}...

Which, if any, of the following qualifications have you studied for?

Please select all that apply

1. **Level 3 qualifications**, for example:
  - *A-Levels or AS Levels*
  - *BTEC level 3*
  - *Level 3 Certificate / Diploma / Award / NVQ*
  - *Level 3 national diploma or certificate*
  - *International Baccalaureate diploma*
  - *Level 3 English for Speakers of Other Languages (ESOL)*

- *Access to higher education diploma*
- *Advanced apprenticeship*
- *Foundation diploma*
- *Applied general*
- *Tech level*

2. **Level 4 qualifications**, for example:

- *Level 4 Certificate / Diploma / Award / NVQ*
- *Higher National Certificate (HNC)*
- *Certificate of Higher Apprenticeship or Higher Education (CertHE)*

3. **Level 5 qualifications**, for example:

- *Level 5 Certificate / Diploma / Award / NVQ*
- *Diploma of higher education (DipHE)*
- *Higher National Diploma (HND)*
- *Foundation degree*

4. **Level 6 qualifications**, for example:

- *Undergraduate degree/degree apprenticeship*
- *Level 6 Certificate/ Diploma / Award / NVQ*
- *Graduate diploma or certificate*

5. None of these [EXCLUSIVE]

[NO DK/REF]

**{IF StudWhat = 1...4}**

**StudPTFT**

And still thinking about the times in the last {IF Age > 22 "5 years"; IF Age = 21 "4 years"; IF Age = 20 "3 years"; IF Age = 19 "2 years"; IF Age = 18 "year"} that you started studying for any of those qualifications...

Were you studying full time or part time?

By **full time** we mean courses that involve mostly face-to-face learning for at least 24 weeks of study or placement per academic year

By **part time** we mean distance or online learning, or courses that involve mostly face-to-face learning for less than 24 weeks of study or placement per academic year

1. Full time
2. Part time
3. Both full time and part time

[NO DK/REF]

**{IF StudPTFT =1 AND Age = 21...25}**

**StudWhen**

And now thinking about the **the most recent** time that you started studying for any of those qualifications...

How old were you when you were **started** studying for this qualification?

RANGE 11...25

[NO DK/REF]

HARDCHECK: IF StudWhen > Age “The age you entered is greater than your current age. Please check your answer.”

### EnterStudy [DV]

COMPUTE EnterStudy = 2

IF StudWhat = 1...4 EnterStudy = 1

IF StudPTFT = 1 AND Age = 18...20 EnterStudy = 2

IF ConsPTFT = 1 AND StudWhen = 11...20 EnterStudy = 2

**START FILTER: ASK IF ConsStudy = 1 OR EnterStudy = 1**

**ELSE: Screen out of questionnaire**

## 1.3 Nature of most recent time considered/entered education

{ASK ALL}

ConsEnt

We would now like you to think about the <b>most recent time</b> that you {IF ConsStudy = 1 “considered”; IF ConsStudy = 1 AND EnterStudy = 1 “ or”; IF EnterStudy = 1 “started”} studying for a course leading to a qualification.

If you {IF ConsStudy = 1 “considered”; IF ConsStudy = 1 AND EnterStudy = 1 “ or”; IF EnterStudy = 1 “started”} studying for more than one qualification at the same time, please think about the qualification that was most important to you.

Which of the following best describes what happened?

1. I considered studying, but decided *not to apply* for any course
2. I considered studying, and *may still apply* for a course
3. I applied for a course, but *decided not to start*
4. I applied for a course, but *was not accepted*
5. I applied for a course, but have *not begun studying yet/* still waiting for the application result
6. I *began studying* for a qualification

### Status [DV] – Var Label ‘Respondent studying status’

COMPUTE Status = -1

IF ConsEnt = 1,2, DK, REF Status = 1 (Val Label ‘Considered studying’)

IF ConsEnt = 3,4,5 Status = 2 (Val Label ‘Applied for a course’)

IF ConsEnt = 6 Status = 3 (Val Label ‘Begun studying’)

{ASK ALL}

QualWhat [MULTICODE]

Which, if any, of the following qualifications did you {IF Status = 1 “consider studying”; IF Status = 2 “apply” IF Status = 3 “start studying”} for?

<b>Level 3 qualifications</b>

1. A-Levels or AS Levels
2. BTEC level 3

3. Level 3 Certificate / Diploma / Award / NVQ
4. Level 3 national diploma or certificate
5. International Baccalaureate diploma
6. Level 3 English for Speakers of Other Languages (ESOL)
7. Access to higher education diploma
8. Advanced apprenticeship
9. Foundation diploma
10. Applied general
11. Tech level
12. Other Level 3 qualification (Please describe)

**<b>Level 4 qualifications</b>**

13. Level 4 Certificate / Diploma / Award / NVQ
14. Higher National Certificate (HNC)
15. Certificate of Higher Apprenticeship or Higher Education (CertHE)
16. Other Level 4 qualification (Please describe)

**<b>Level 5 qualifications</b>**

17. Level 5 Certificate / Diploma / Award / NVQ
18. Diploma of higher education (DipHE)
19. Higher National Diploma (HND)
20. Foundation degree
21. Other Level 5 qualification (Please describe)

**<b>Level 6 qualifications</b>**

22. Undergraduate degree/degree apprenticeship
23. Level 6 Certificate/ Diploma / Award / NVQ
24. Graduate diploma or certificate
25. Other Level 6 qualification (Please describe)

26. None of these

**IF What = 26: Screen out of questionnaire**

{ASK ALL}

QualSubj [RANDOMISE 1...21]

And which, if any, of the following **<b>best</b>** describes the subject of this qualification?

1. Medicine or Dentistry
2. Health and Social Care, Public Services, Nursing and Midwifery
3. Biological Sciences
4. Agriculture, Horticulture and Animal Care
5. Engineering and Manufacturing Technologies
6. Business, Administration, Management, Finance, Accounting, Marketing and Law
7. Architecture, Construction, Property/Environment Building and Planning, Plumbing, Electrical Work, Painting and Decorating
8. Physics, Chemistry, and Mathematics
9. Education, Teaching, Training and Childcare
10. Social Studies, Economics, Politics, Psychology, Sociology, Social Work, Geography
11. Computer Science, Information and Communication Technology (ICT)
12. History, Philosophy and Theology
13. English, Foreign Languages, Literature and Culture
14. Arts, Design, Performing Arts, Music, Drama, Crafts, Creating Writing
15. Mass Communications and Documentation, Media studies, Publishing, Journalism

16. Retail and Commercial Enterprise
17. Leisure, Travel and Tourism, Hospitality and Catering
18. Sport and Recreation
19. Personal Services, Therapy
20. Transport and Logistics
21. Hairdressing and Beauty

22. Other - technical/vocational/practical course
23. Other (Please describe)

{ASK ALL}

QualWhen

How long ago did you {IF Status = 1 “consider studying”; IF Status = 2 “apply” IF Status = 3 “start studying”} for this qualification?

1. Less than 1 year ago
2. 1 year ago or more but less than 2 years ago
3. 2 years ago or more but less than 3 years ago
4. 3 years ago or more but less than 4 years ago
5. 4 years ago or more but less than 5 years ago
6. More than 5 years ago

#### **IF QualWhen = 6: Screen out of questionnaire**

{ASK ALL}

QualLength

And how long did you expect it {IF Status = 1,2 “to”; IF Status = 3 “would”} take for you to complete this qualification?

1. Less than 1 year
2. 1 year or more but less than 2 years
3. 2 years or more but less than 3 years
4. 3 years or more but less than 4 years
5. 4 years or more but less than 5 years
6. More than 5 years

{ASK ALL}

QualPTFT

And were you {IF Status = 1 “considering studying”; IF Status = 2 “applying to study” IF Status = 3 “studying”} {IF Status <> 3 “full time, part time, or both full time and part time”; IF Status = 3 “full time or part time”}?

By <b>full time</b> we mean courses that involve mostly face-to-face learning for at least 24 weeks of study or placement per academic year

By <b>part time</b> we mean distance or online learning, or courses that involve mostly face-to-face learning for less than 24 weeks of study or placement per academic year

1. Full time
2. Part time
3. {IF Status <> 3: “Both full time and part time”}

**IF QualPTFT = 1 AND Age = 18...20: Screen out of questionnaire**

**IF QualPTFT = 1 AND ((Age = 21 AND QualWhen = 2...6) OR (Age = 22 AND QualWhen = 3...6) OR (Age = 23 AND QualWhen = 4...6) OR (Age = 24 AND QualWhen = 5...6)): Screen out of questionnaire**

**{ASK ALL}**

**InstType [MULTICODE - RANDOMISE 1...5]**

At which of the following types of organisations did you {IF Status = 1 “consider studying”; IF Status = 2 “apply to study” IF Status = 3 “start studying”}?

Please select all that apply

1. University/higher education institutions
2. A further education college
3. Private Training Provider (e.g. UK Youth, The Wise Group, Zurbel Training, etc.)
4. Local Authority
5. Employer/Apprenticeships
6. Other (please specify)
7. {IF Status = 1 “I did not think about types of organisations”} [EXCLUSIVE]

**{IF InstType<>7}**

**InstWhy [MULTICODE: RANDOMISE 1...14 – randomise each section and then within each section]**

For which, if any, of the following reasons did you {IF Status =1 “consider applying”; IF Status <>1 “apply”} to study at {IF ONE ANSWER AT Instype: “this type”; IF MORE THAN ONE ANSWER AT Instype: “these types”} of organisation?

Please select all that apply

**<b>Logistics/Accessibility reasons</b>**

1. Convenient location
2. Good for distance or flexible learning
3. Offered the course at a convenient time of the day
4. Offered the course cheaper than elsewhere

**<b>Education/Institution reasons</b>**

5. Offered the course closest to what I wanted to study
6. Good academic reputation
7. Good reviews online or elsewhere
8. No/low entry requirements
9. Wide range of extra-curricular activities

**<b>Advices/ Personal reasons</b>**

10. I had previously studied there
11. A family member, friend or colleague was already studying/considering applying there
12. Employer directed me
13. Personal recommendation
  
14. I did not have any other options
15. Other (please specify)

{ASK ALL}

HiEdQual

<b>When you were considering studying for this new qualification</b>, what was the highest educational level that you had achieved?

1. No formal education
2. Primary
3. Secondary school, high school, 6th form/ college, GCSE's, ALevels, BTEC, NVQ levels 1 to 3, etc.
4. University degree or equivalent professional qualification, NVQ level 4, etc.
5. Higher university degree, doctorate, MBA, NVQ level 5, etc.
6. Still in full time education

## 1.4 Motivations for studying

{ASK ALL}

QualMotiv [MULTICODE: RANDOMISE 1...15 – randomise each section and then within each section]

The next few questions will ask about why you were considering studying.

Why did you consider studying for this qualification?

Please select all that apply

<b>Career/professional reasons</b>

1. To help me to get a job/new job
2. To help me change careers
3. To help me progress in my current career/job
4. To help me earn more money/get a pay raise
5. To develop my professional networks
6. I was unable to get a job

<b>Education reasons</b>

7. To help me progress to a higher qualification
8. To expand/develop my range of skills and knowledge
9. I had enjoyed my previous studies
10. I was interested in the subject

<b>Personal reasons</b>

11. To do something new
12. For fun
13. To stretch/prove myself intellectually
14. To meet new people
15. It felt like a natural step for me
16. To be a role model for my children

17. Other (Please describe)

18. There was no specific reason [EXCLUSIVE]

{IF QualPTFT = 2, 3}

PTWhy [RANDOMISE 1...8]

What was your <b>main reason</b> for {IF Status=1 “considering”; IF Status = 2 “applying for” IF Status = 3 “starting”} a <b>part-time</b> course?

1. Could not afford to study full-time and not work
2. Wanted to combine study and work

3. Wanted to combine study with my other interests
4. Wanted to combine study with my domestic/caring responsibilities
5. Felt less risky than full time study
6. Offered greater flexibility/convenience
7. Cheaper than full-time study
8. The course was only available part-time
9. Other (Please describe)

## 1.5 Careers information and advice

**START FILTER: ASK IF QualMotiv = 1...6**

{ASK ALL}

CarAdvSeek

When you were considering studying for this qualification did you seek any - formal or informal - **careers** advice or guidance?

1. Yes
2. No

{IF CarAdvSeek = 1}

CarAdvSourc [MULTICODE: RANDOMISE 1...10 – randomise each section and then within each section]

Which of the following sources did you seek **careers** advice or guidance from?

Please select all that apply

**University/College**

1. Careers service at a university/college
2. Widening participation / outreach officer at a university/college
3. Teaching staff at a university/college
4. Someone else at a university/college

**Specific services/agencies**

5. National Careers Service (Government service)
6. Public or private careers agency
7. Online careers advice service (e.g. Learndirect)

**People in your life**

8. Family and friends
9. My employer
10. Someone at my work place

11. Other (Please describe)

**END FILTER: ASK IF QualMotiv = 1...6**

## 1.6 Education costs

### 1.6.1 Tuition fees

{ASK ALL}

Fees

Still thinking about the qualification you **most recently** {IF Status = 1 “considered studying for”; IF Status = 2 “applied for” IF Status = 3 “started”}...

**Approximately** how much were the tuition fees **per academic year**?

- Regardless of whether you {IF Status=1,2 “would have paid”, IF Status=3 “pay”} for them yourself, please give the **full fees**,
- For qualifications with courses that lasted less than a year, please **give the fees for the entire course**
- If you are unsure, please give **your best estimate**

RANGE: 1...15000

1. The course did not have any fees
2. Don't know

SOFTCHECK {IF FEES >10,000} “You have answered that the tuition fees per academic year were £{Fees}, is this correct? Press next if this is correct, or please amend your answer”

{IF QualFees = DK, REF}

Fees\_Band [FLIP SCALE: 1...7]

Which of the following is closest to how much the tuition fees were per academic year?

- Regardless of whether you paid for them yourself, please give the **full fees**,
- For qualifications with courses that lasted less than a year, please **give the fees for the entire course**
- If you are unsure, please give **your best estimate**

1. £1 - £499
2. £500 - £999
3. £1,000 - £2,499
4. £2,500 - £4,999
5. £5,000 - £7,499
6. £7,500 - £9,999
7. £10,000 or more

8. The course did not have any fees
9. Don't know

SOFTCHECK {IF Fees\_Band =7} “You have answered that the tuition fees per academic year were **>£10,000 or more**, is this correct? Press next if this is correct, or please amend your answer”

## 1.6.2 Tuition fees funding

{IF Fees OR Fees\_Band <> ‘The course did not have fees’}

FeesRFund

Did you {IF Status <> 3 “intend to”} pay these tuition fees entirely yourself (e.g. from your own income or savings), or did you {IF Status <>3 “intend to”} receive some financial support (e.g. a loan or grant or support from family or an employer)?

1. Pay fees entirely myself
2. Pay fees partly myself and partly with some financial support
3. Get financial support to pay for all my fees
4. I didn't know how I'd be able to pay the tuition fees/ I didn't think about fees at this stage

{IF FeesRFund = 2,3}

### FeesWhoFund [MULTICODE: RANDOMISE 1...10]

From which, if any, of the following sources did you {IF Status <= 3 “intend to”} receive some financial support to help pay for your tuition fees?

Please select all that apply

1. Friends or family
2. My employer
3. Bank
4. The government
5. The NHS/health department
6. The institution I {IF Status = 1 “intended to”} study at
7. Loans from the Student Loans Company
8. Advanced Learner Loan (Previously 24+ Advanced Learner Loans)
9. A charity
10. Teaching Bursary
11. Other (Please describe)

### 1.6.3 Financial advice & information

{ASK ALL}

FinAdvSeek

When you were considering studying for this qualification did you seek any - formal or informal - **financial** advice or guidance?

1. Yes
2. No

{IF FinAdvSeek = 1}

FinAdvSourc [MULTICODE: RANDOMISE 1...8]

And which, if any, of the following sources did you seek **financial** advice or guidance from?

Please select all that apply

1. University / college
2. Directgov / Department for Business, Innovation and Skills/ Department for Education website
3. NUS – National Union of Students
4. National Careers Service/ Student Finance England (Government services)
5. Online financial advice service (e.g. Learndirect, The Student Room, The Money Advice Service)
6. Family and friends
7. My employer
8. Someone at my workplace
9. Other (Please describe)

### 1.6.4 Government student loans – fees and maintenance

{ASK ALL}

GovLoCon [RANDOMISE ROWS; FLIP SCALE]

When you were considering studying for this qualification, did you know that there are **government student loans** available to pay for...

ROWS

1. the tuition fees of the course
2. your living costs while studying (maintenance loan)

COLS

1. Yes – I applied for one
2. Yes – I applied for one but was not eligible
3. Yes – I considered applying for one
4. Yes – but I *did not* consider applying for one
5. No – I was not aware of this loan

{IF GovLoCon1 =4 }

GovLoNo1 [MULTICODE: RANDOMISE 1...9]

Why did you **<b>NOT consider</b>** taking out a government student loan to pay **<b>for your tuition fees</b>**?

Please select all that apply

1. Concerns about getting into/increasing my debt
2. I did not like the terms of the loan offer
3. I didn't know where to get information
4. I didn't know where/how to apply
5. The information available was too difficult to understand
6. It was too difficult to understand if I qualified for a loan
7. I realised too late I would have been eligible
8. I knew I didn't qualify for a loan
9. I didn't need a loan
10. Other (Please describe)

{IF GovLoCon2=4}

GovLoNo2 [MULTICODE: RANDOMISE 1...9]

Why did you **<b>NOT consider</b>** taking out a government student loan to pay for your **<b>living costs while studying</b>**?

Please select all that apply

1. Concerns about getting into/increasing my debt
2. I did not like the terms of the loan offer
3. I didn't know where to get information
4. I didn't know where/how to apply
5. The information available was too difficult to understand
6. It was too difficult to understand if I qualified for a loan
7. I realised too late I would have been eligible
8. I knew I didn't qualify for a loan
9. I didn't need a loan
10. Other (Please describe)

{IF GovLoCon1=1,2,3 OR GovLoCon2=1,2,3 OR GovLoNo1<>9 OR GovLoNo2<>9}

GovLoInfo [MULTICODE: RANDOMISE 1...8]

Where did you search for information about government student loans?

Please select all that apply

1. University / college
2. Directgov / Department for Business, Innovation and Skills/ Department for Education website

3. NUS – National Union of Students
4. National Careers Service/ Student Finance England (Government services)
5. Online financial advice service (e.g. Learndirect, The Student Room, The Money Advice Service)
6. Family and friends
7. Employer
8. Someone at my workplace
9. Other (please describe)
10. I did not search for information [EXCLUSIVE]

## 1.7 Support from employer

{ASK ALL}

InEmp

When you were considering studying for this new qualification, which of the following best described your working status?

1. Working full time - working 30 hours per week or more
2. Working part time - working between 8 and 29 hours per week
3. Not working but seeking work or temporarily unemployed or sick
4. Not working and not seeking work
5. Student
6. Retired on a state pension only
7. Retired with a private pension
8. House person, housewife, househusband, etc.

{IF InEmp = 1,2}

ConsEmpSec

Which of the following best describes the sector you were working in when you were considering studying for this new qualification?

1. Business Services
2. Construction/Tradesperson
3. Energy / Utilities
4. Financial Services
5. IT / Communication Services
6. Journalism
7. Manufacturing
8. Marketing (including market research & advertising)
9. Media / Publishing
10. Mobile Telecoms (including retailers)
11. Public Relations
12. Retail / Wholesale
13. Legal
14. Public sector – Health related
15. Public sector – Education related
16. Public sector - Other
17. Other (Please describe)

{IF InEmp = 1,2}

EmpQualRel [FLIP SCALE]

To what extent was the new qualification you were considering studying for related to your job?

1. A great deal

2. Somewhat
3. A little
4. Not at all

{IF InEmp = 1,2}

**EmpAware**

Was your employer aware that you were considering studying for a new qualification?

1. Yes
2. No

{IF InEmp = 1,2}

**EmpHelp [RANDOMISE ROWS]**

Below is a list of things some employers might do to support their employees to study.

When you were considering studying for this new qualification, did you know if your employer would support you in any of the following ways?

ROWS

1. {IF Fees OR Fees\_Band <> 'The course did not have fees': "Pay for <b>all</b> my tuition fees"}  
2. {IF Fees OR Fees\_Band <> 'The course did not have fees': "Pay for <b>some of</b> my tuition fees"}  
3. Give me <b>paid</b> time off work to study  
4. Give me <b>unpaid</b> time off work to study  
5. Allow me to work <b>more flexible hours</b> so I could study

COLS

1. Yes - I knew my employer would do this
2. Yes - I knew my employer would <b>NOT</b> do this
3. No - I <b>did not know</b> whether my employer would do this

## 1.8 Caring responsibilities

{ASK ALL}

**ChildCareResp**

When you were considering studying for this new qualification, did you have any childcare responsibilities?

Please do not count anything you did as part of paid employment

1. Yes
2. No

{ASK ALL}

**OthCareResp**

And {IF ChildCareResp =1: "other than those childcare responsibilities"} were you looking after or giving help or support to family members, friends, neighbours or others because they have a long-term physical or mental ill-health or disability, or problems related to age?

Please do not count anything you do as part of paid employment

1. Yes
2. No

{IF ChildCareResp = 1 OR OthCareResp = 1}

CareRespHrs [FLIP SCALE (0...7)]

About how many hours a week would you say you spent {IF ChildCareResp =1: "on childcare"}{IF ChildCareResp =1 AND IF OthCareResp = 1: "and"}{IF OthCareResp= 1: "looking after or helping other people because they had a long-term physical or mental ill-health or disability, or problems related to age"}?

Please include any time you spend travelling so that you can do these activities

1. 0-4 hours a week
2. 5-9 hours a week
3. 10-19 hours a week
4. 20-34 hours a week
5. 35-49 hours a week
6. 50-90 hours a week
7. 100 or more hours a week
8. It varies but usually under 10 hours a week
9. It varies but usually more than 10 hours a week

{IF ChildCareResp = 1 OR OthCareResp = 1}

CareRespChange

In order to start studying for this new qualification, {IF Status=1,2 "would you have", IF Status=3 "have you"} had to change your {IF ChildCareResp =1: "childcare"}{IF ChildCareResp =1 AND IF OthCareResp = 1: "and other"}{IF OthCareResp= 1: "care"} arrangements?

1. Yes
2. No

## 1.9 Barriers & enablers

{ASK ALL}

BarEnablIntro

We would now like to ask you about things that can make it easier or harder for people to enter education, and the extent to which they affected you when considering studying for this new qualification.

DISPLAY

{ASK ALL}

BarEnab [RANDOMISE ROWS 1...18 – randomise each section and then within each section; FIP SCALE: 1...5]

To what extent, if at all, did each of the following make it <b>harder</b> or <b>easier</b> for you to {IF Status = 1 "consider studying for"; IF Status = 2 "apply for" IF Status = 3 "start"} this new qualification?

ROWS

<b>The courses </b>

1. Level of difficulty of the course
2. Accessibility of the course (e.g. time of the day, availability of distance or flexible learning)
3. The match between available courses and my interests/ what I was looking for

**<b>Costs</b>**

4. The cost of tuition fees
5. The cost of books, equipment, travel, etc. related to study
6. The cost of living while studying
7. Availability of formal financial support (e.g. loans)
8. Availability of informal financial support (e.g. family, friends)

**<b>Application process</b>**

9. Level of difficulty of the application process
10. Availability of careers advice
11. Availability of information about education opportunities

**<b>Time/Logistic </b>**

12. The amount of time required in study
13. {IF InEmp=1,2 “Balance with work commitments / support from your employer”}
14. Balance with family commitments / support from your family
15. Location of institution (e.g. distance from home/work)

**<b>Personal reasons </b>**

16. Confidence in study ability/ previous experience in the education system
17. Maintaining motivation and interest in the course
18. Starting studying with friends/colleagues

**COLS**

1. I would not have been able to enter education without this
2. Easier
3. Neither easier nor harder
4. Harder
5. This prevented me from entering education
6. Not applicable

## **1.10 Attitudes to post-18 education**

**{ASK ALL}**

**Attitudes [GRID: RANDOMISE ROWS; FLIP SCALE]**

To what extent do you agree or disagree with the following statements?

**ROWS**

1. When considering studying for a new qualification, family commitments made me think twice
2. I do not have enough time to commit to studying
3. Financial support to study is inadequate for people like me
4. Part-time courses offer good value for money
5. I needed more advice choosing what to study
6. People running courses consider the difficulties of combining study, work and family commitments

7. In the long-term, I {IF Status <> 3 “would have benefited”; IF Status = 3 “will benefit”} financially from studying my course
8. In the long-term, I {IF Status <> 3 “would have benefited”; IF Status = 3 “will benefit”} socially from studying my course
9. I feel confident that I will be / would have been able to conclude my studies and achieve a qualification
10. Study after the age of 18 is for people like me

COLS

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree

## 1.11 Additional demographics

### 1.11.1 Household, family, & caring responsibilities

{ASK ALL}

Househd

“Thinking now of everyone living in your household, <b>including children</b>...”

<b>Including yourself</b>, how many people live there regularly as members of the <b>household</b>?”

RANGE 1...15

**PAGE START**

**LAYOUT: Include HhldAge2 ... HhldAgeN where N = {Househd}**

{IF Househd > 1}

HhldAgeInt

And what are the ages of the {Househd} people living in your household?

{WEB: “If you are not sure, please give your best estimate”}

INTERVIEWER: IF DON'T KNOW, PROBE FOR APPROXIMATE AMOUNT.

Person 1 (You): {IF Age given: {Age}; ELSE: “Not provided”}

DISPLAY

{IF Househd > 1}

HhldAge2

Person 2: RANGE 0...110

{ASK IF Househd > 2}

HhldAge3

Person 3: RANGE 0...110

...

{IF Househd > [N-1]}

HhldAge[N]

Person [N]: RANGE 0...110

## PAGE END

### NumChild [DV]

SUM of where HhldAge2...HhldAge15 = 0...17

{IF NumChild > 0}

NumRChild

And {IF NumChild > 1: "how many, if any, of the {NumChild} people"; IF NumChild = 1: "how many, if any, of the people"} <b>aged under 18 </b> living in your household {IF NumChild > 1: "are your children?"; IF NumChild = 1: "are your children?"}

Please include step or adopted children.

RANGE: 0...14

HARDCHECK: {IF NumRChild > NumChild: You have said more people aged 0 to 17 living in your household are your children than you said there are living in your household. Please check your answers.}

{ASK ALL}

demogs\_marital

**Which of the following best describes your marital status?**

Single

Married

Civil Partnership

Cohabiting

Widowed

Separated

Divorced

Prefer not to answer

{ASK ALL}

ParUni [MULTICODE]

Have any of your following relations completed, or are any of them currently studying for, a university degree course or equivalent (eg, BA, BSc or higher)?

Please select all that apply

1. Your partner
2. Any of your children
3. Your mother
4. Your father
5. None of these [EXCLUSIVE]

## 1.11.2 Working status

{ASK ALL}

demogs\_status

**Which of the following best describes your current working status?**

1. Working full time - working 30 hours per week or more
2. Working part time - working between 8 and 29 hours per week
3. Not working but seeking work or temporarily unemployed or sick

4. Not working and not seeking work
5. Student
6. Retired on a state pension only
7. Retired with a private pension
8. House person, housewife, househusband, etc.

**{IF Demogs\_Emp=1,2 - Currently employed}**  
**EmpSec**

Which of the following best describes the sector that you currently work in?

1. Business Services
2. Construction/Tradesperson
3. Energy / Utilities
4. Financial Services
5. IT / Communication Services
6. Journalism
7. Legal
8. Manufacturing
9. Marketing (including market research & advertising)
10. Media / Publishing
11. Mobile Telecoms (including retailers)
12. Public Relations
13. Retail / Wholesale
14. Public sector – Health related
15. Public sector – Education related
16. Public sector - Other
17. Other (Please describe)

**{IF Demogs\_Emp=1,2 - Currently employed}**  
**Demogs\_Occupation**

**Do you work in any of the following occupations?**

1. A nationalised industry/state corporation
2. Central government or civil service (including Courts service and Bank of England)
3. Local government or council (including fire services, police and local authority controlled schools/colleges)
4. A university, or other grant funded establishment (include opted-out schools)
5. A health authority or NHS Trust
6. A charity, voluntary organisation or trust
7. The armed forces
8. Other public sector occupation (if yes – please specify as much detail as possible)
9. Self-employed (Private sector)
10. None of the above/ I work in the Private sector

### 1.11.3 Other demographics

**{ASK ALL}**

**Demogs\_Income**

What is the combined annual income of your household, prior to tax being deducted?

1. Up to £7,000
2. £7,001 to £14,000
3. £14,001 to £21,000
4. £21,001 to £28,000
5. £28,001 to £34,000

6. £34,001 to £41,000
7. £41,001 to £48,000
8. £48,001 to £55,000
9. £55,001 to £62,000
10. £62,001 to £69,000
11. £69,001 to £76,000
12. £76,001 to £83,000
13. £83,001 or more
14. Prefer not to answer

**{ASK ALL}**

**FHHInc [FLIP SCALE]**

Going back to <b>when you were considering studying for a qualification</b>, what was the combined annual income of your household, prior to tax being deducted?

1. Up to £7,000
2. £7,001 to £14,000
3. £14,001 to £21,000
4. £21,001 to £28,000
5. £28,001 to £34,000
6. £34,001 to £41,000
7. £41,001 to £48,000
8. £48,001 to £55,000
9. £55,001 to £62,000
10. £62,001 to £69,000
11. £69,001 to £76,000
12. £76,001 to £83,000
13. £83,001 or more
14. Prefer not to answer

**{ASK ALL}**

**demogs\_house**

**Is the house or flat in which you live...?**

1. Owned outright - without mortgage
2. Owned with a mortgage or loan
3. Rented from the council
4. Rented from a housing association
5. Rented from someone else
6. Rent free

**{ASK ALL}**

**demogs\_ethnicity**

**To which of the following ethnic groups do you consider you belong?**

1. White
2. Mixed
3. Asian
4. Black
5. Chinese
6. Other ethnic group

**{ASK ALL}**

**demogs\_disability [MULTICODE]**

**Do you have a longstanding physical or mental/learning condition or disability that has lasted or is likely to last 12 months and which has a substantial adverse effect on your ability to carry out day-to-day activities?**

1. Yes - physical condition
2. Yes - mental condition
3. Yes – learning difficulty
4. Yes - disability
5. Yes - other
6. No
7. Prefer not to say

## 1.12 Opt-in for qual follow-up

{ASK ALL}

OptIn

The client for this survey - **NatCen Social Research** [hyperlink to NatCen webpage for info - <http://natcen.ac.uk/>], an independent social research organisation – will conduct some **follow-up telephone interviews** over the coming weeks.

**Incentive**

If you choose to participate, as a thank you, £20 will be added to your account.

**What**

The interview should take around 45 minutes, but this may be a little longer or shorter depending on your circumstances. It would cover the topics we asked you about in this survey: your views and experiences of considering part-time and/or mature study, including main barriers and motivations encountered.

These interviews are carried out on behalf of the **Department for Education (DfE)**. By taking part you can make sure that government takes into account the true opinions and experiences of the public.

**When and How**

If you give your consent to take part into this study, you will receive an email for confirmation directly from NatCen. Then a NatCen researcher will contact you over the phone (09:00 am – 5:00 pm) for the interview.

If you agree to take part, we will send NatCen:

- your contact details (email and phone number)

- the answers you have given in this study linked to your name/surname so your responses can be attributed to you

Please note: access to the data will be restricted and controlled to make sure that researchers use the information responsibly and safely. For more information about how NatCen will handle data, please visit: <http://natcen.ac.uk/taking-part/studies-in-field/post-18-choice-of-part-time-study>

Would you be willing to take part in this follow up survey?

1. Yes
2. No

# Appendix B - Qualitative interviews topic guide

## 1.1. Introduction

- **Purpose of discussion:** Explore participant's views and experiences of considering the take up of post-18 PT / mature study, including their main motivations and the barriers and enablers encountered.
- **The funder and value of the study:** The study is funded by the DfE and conducted by NatCen Social Research. The information will be used to produce a report that will provide a better understanding of prospective students' experiences and perspectives, and will go on to inform the Government's 'Post-18 review of education and funding' currently underway. We're interested in your genuine views as these are crucial to improving provision in the coming years.
- **Reassurances:**
  - Confidentiality: We may include some quotes from this interview in the report to be published, but these will be completely anonymous and we would ensure that you are not identifiable.
  - Voluntary participation: You do not have to answer anything you do not want to and are free to withdraw at any time.
  - Permission to record: Explain you would like to record the interview as this means that you do not have to scribble everything down.
- **Any questions**

## 1.2. Core interview

Topic areas	Sub-themes and prompts
<b>Contextual information</b> (5 mins)	<ul style="list-style-type: none"> <li>• Brief overview of participant's background               <ul style="list-style-type: none"> <li>○ Current employment situation (whether employed, in which sector and role, for how long)</li> <li>○ Highest qualification and when this was completed</li> </ul> </li> <li>• Overview of studies considered               <ul style="list-style-type: none"> <li>○ Whether currently considering post-18 PT / mature study or considered this over the past 5 years but decided against – if considered in the past, ask when</li> <li>○ Type(s) and level(s) of qualification</li> <li>○ Subject(s) under consideration</li> <li>○ Provider(s) (HE or FE)</li> <li>○ Mode(s) of learning (face-to-face / distance learning; accelerated)</li> </ul> </li> </ul>
<b>Post-18 education aims and goals</b>	<ul style="list-style-type: none"> <li>• Main motivation for considering post-18 PT / mature study (career progression or career change)</li> </ul>

Topic areas	Sub-themes and prompts
(5 mins)	<ul style="list-style-type: none"> <li>• Main goals and how take-up of education will help achieve these               <ul style="list-style-type: none"> <li>○ For people interested in upskilling / developing their current careers</li> <li>○ For people interested in changing their careers</li> </ul> </li> </ul>
<b>Decision-making process in relation to access and participation</b> (10 mins)	<ul style="list-style-type: none"> <li>• What triggered decision to enter / continue education (what specific events)</li> <li>• Motivations for considering specific qualification(s)</li> <li>• Motivations for considering specific subject(s)</li> <li>• Motivations for considering specific provider(s)</li> <li>• Motivations for considering studying PT / FT</li> <li>• Motivations for considering specific modes of learning</li> <li>• Steps taken / envisaged to make studying a reality (eg looking up information; talking to someone)</li> <li>• Sources and level of information accessed / intended to access</li> <li>• Main factors affecting decision to enter / continue education (eg peer networks; family)</li> <li>• Importance of flexible learning and what this looks like in practice (eg distance learning; flexible hours)</li> </ul>
<b>Barriers to take-up of post-18 PT / mature study</b> (10 mins)	<ul style="list-style-type: none"> <li>• Aspects discouraging / preventing participant from taking up studies               <ul style="list-style-type: none"> <li>○ Understanding of the students' finance system, whether they perceive this as a barrier or an enabler and why – prompt in particular for: level of tuition fees; if eligible, willingness to take out government student loans to pay for tuition fees; if eligible, understanding of the repayment conditions of the loans; if eligible, knowing how to apply for student loans</li> <li>○ Extent to which they see the costs of study as a barrier (tuition fees; other resources)</li> <li>○ If considering FT study, extent to which they see lost income from employment as a barrier</li> <li>○ Extent to which they consider personal circumstances and competing responsibilities as a barrier and why (eg caring responsibilities; employment; lack of time)</li> <li>○ Other types of barriers – prompt in particular for: knowledge about how to find out what courses are available; supply of courses in their area; length and structure of courses; general attitudes towards</li> </ul> </li> </ul>

Topic areas	Sub-themes and prompts
	<p>education and confidence as learners;  expectations of 'fitting in' / enjoying the experience;  perceptions of value for money.</p> <ul style="list-style-type: none"> <li>○ If participant has previously considered post-18 education but decided against, ask why / main barriers</li> </ul>
<p><b>Enablers in take-up of post-18 PT /mature study</b>  (10 mins)</p>	<ul style="list-style-type: none"> <li>• Aspects that participant feels currently facilitate their take up of studies <ul style="list-style-type: none"> <li>○ Alternative sources of financial support (eg from employer or family members)</li> <li>○ Practical and emotional support from employer (eg flexible work arrangements; encouragement)</li> <li>○ Practical and emotional support from family and friends</li> <li>○ Perceptions of the benefits of HE/FE and of getting a qualification</li> <li>○ Other aspects positively influencing decision-making (eg good supply of locally available courses)</li> <li>○ If participant has previously considered post-18 education but decided against, ask what has changed since then which facilitates take-up</li> </ul> </li> <li>• Enablers that participant would find especially beneficial which are not currently available</li> </ul>
<p><b>Reflections and future expectations</b>  (5 mins)</p>	<ul style="list-style-type: none"> <li>• Current expectations about take-up of post-18 study (whether they are going to pursue further studies; next steps they will take)</li> <li>• Final reflections on process of decision-making</li> </ul>

## Appendix C - Subject of the most recent qualification considered or started studying for (grouped)

Table C.1: Subject of the most recent qualification prospective learners started or considered studying four recoded into nine groups

Variable - QualSub Subject of the most recent qualification considered or started studying		CATEGORIES									Code - unweighted bases
Code	Item	Science & maths	Social science & humanities	Arts & Languages	Medical & health profes.	Business, accountan cy law, etc.	Education	Computer science & ICT	Other technical, vocational/ practical	Other	
1	Medicine or Dentistry				x						9
2	Health and Social Care, Public Services, Nursing and Midwifery				x						110
3	Biological Sciences	x									19
4	Agriculture, Horticulture and Animal Care								x		18
5	Engineering and Manufacturing Technologies								x		30
6	Business, Administration, Management, Finance, Accounting, Marketing and Law					x					168
7	Electrical Work, Painting and Decorati								x		21
8	Physics, Chemistry and Mathematics	x									24
9	Education, Teaching, Training and Childcare						x				91
10	Geography		x								83
11	Computer Science, Information and Communication Technology (ICT)							x			83
12	History, Philosophy and Theology		x								23
13	English, Foreign Languages, Literature and Culture			x							57
14	Arts, Design, Performing Arts, Music, Drama, Crafts, Creating Writing			x							46
15	Mass Communications and Documentation, Media studies, Publishing, Journalism								x		8
16	Retail and Commercial Enterprise								x		23
17	Leisure, Travel and Tourism, Hospitality and Catering								x		29
18	Sport and Recreation								x		10
19	Personal Services, Therapy								x		17
20	Transportation and Logistics								x		22
21	Hairdressing and Beauty								x		17
22	Other . technical/vocational/practical course								x		35
23	Other (Please describe)									x	42
<b>Subgroup - number of codes</b>		2	2	2	2	1	1	1	11	1	
<b>Subgroup - unweighted bases</b>		43	106	103	119	168	91	83	230	42	985

Table C.2: Subject of the most recent qualification prospective learners started or considered studying for recoded into five groups

Code	Variable - Qualsub	CATEGORIES					Code - Unweighted bases
	Subject of the most recent qualification considered or started	STEM	Medical & health profes.	Social sciences, arts and humanities	Other technical, vocational/practical	Other	
	Item						
1	Medicine or Dentistry		x				9
2	Health and Social Care, Public Services, Nursing and Midwifery		x				110
3	Biological Sciences	x					19
4	Agriculture, Horticulture and Animal Care	x					18
5	Engineering and Manufacturing Technologies	x					30
6	Business, Administration, Management, Finance, Accounting, Marketing and Law	x					168
7	Architecture, Construction, Painting and Decorating etc.				x		21
8	Physics, Chemistry, and Mathematics	x					24
9	Education, Teaching, Training and Childcare			x			91
10	Social Studies, Economics, Politics, Psychology, Sociology, Social Work, Geography			x			83
11	Computer Science, Information and Communication Technology (ICT)	x					83
12	History, Philosophy and Theology			x			23
13	English, Foreign Languages, Literature and Culture			x			57
14	Arts, Design, Performing Arts, Music, Drama, Crafts, Creating Writing			x			46
15	Mass Communications and Documentation, Media studies, Publishing, Journalism			x			8
16	Retail and Commercial Enterprise				x		23
17	Leisure, Travel and Tourism, Hospitality and Catering				x		29
18	Sport and Recreation				x		10
19	Personal Services, Therapy				x		17
20	Transport and Logistics				x		22
21	Hairdressing and Beauty				x		17
22	Other - technical/vocational/practical course				x		35
23	Other (Please describe)					x	42
Subgroup - number of codes		7	2	6	7	1	
Subgroup - unweighted bases		342	119	308	174	42	985

## Appendix D - Proportion of prospective learners selecting each motivation for studying, by educational and personal motivations

Table D.1: Proportion of prospective learners selecting each motivation, by educational motivations

	To help me progress to a higher qualification	To expand my range of skills and knowledge	I had enjoyed my previous studies	I was interested in the subject
<b>Professional</b>				
To help me to get a job/new job	37%	32%	33%	33%
To help me change careers	27%	30%	28%	32%
To help me progress in my current career/job	47%	38%	34%	30%
To help me earn more money/get a pay raise	37%	25%	23%	22%
To develop my professional networks	26%	21%	24%	20%
I was unable to get a job	4%	3%	5%	4%
<b>Educational</b>				
To help me progress to a higher qualification	100%	37%	48%	34%
To expand/develop my range of skills and knowledge	63%	100%	68%	62%
I had enjoyed my previous studies	27%	23%	100%	24%
I was interested in the subject	57%	61%	71%	100%
<b>Personal</b>				
To do something new	36%	40%	38%	45%
For fun	9%	13%	20%	17%
To stretch/prove myself intellectually	52%	57%	65%	58%
To meet new people	16%	14%	22%	16%
It felt like a natural step for me	34%	27%	36%	25%
To be a role model for my children	15%	10%	14%	13%
<i>Unweighted base</i>	<i>270</i>	<i>460</i>	<i>152</i>	<i>451</i>

Table D.2: Proportion of prospective learners selecting each motivation, by educational motivations

	To do something new	For fun	To stretch/prove myself intellectually	To meet new people	It felt like a natural step for me	To be a role model for my children
<b>Professional</b>						
To help me to get a job/new job	38%	20%	29%	28%	40%	45%
To help me change careers	33%	22%	29%	31%	27%	43%
To help me progress in my current career/job	24%	24%	37%	34%	45%	31%
To help me earn more money/get a pay raise	22%	13%	24%	31%	33%	33%
To develop my professional networks	17%	20%	21%	32%	30%	20%
I was unable to get a job	5%	2%	4%	9%	4%	7%
<b>Educational</b>						
To help me progress to a higher qualification	30%	24%	35%	40%	51%	46%
To expand/develop my range of skills and knowledge	56%	62%	65%	61%	67%	52%
I had enjoyed my previous studies	18%	30%	25%	33%	30%	24%
I was interested in the subject	62%	77%	65%	67%	61%	64%
<b>Personal</b>						
To do something new	100%	45%	43%	60%	37%	40%
For fun	14%	100%	14%	24%	13%	6%
To stretch/prove myself intellectually	54%	59%	100%	62%	60%	49%
To meet new people	19%	25%	16%	100%	17%	17%
It felt like a natural step for me	20%	23%	27%	30%	100%	30%
To be a role model for my children	11%	5%	11%	14%	15%	100%
<i>Unweighted base</i>	327	99	404	104	181	89



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