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ABSTRACT
                While recent research on why adults participate in
continuing education programs does not provide educational planners
with any easy prescriptions for programing success, it does suggest
some broad directions for more effective program development,
particularly in relation to needs assessment, the promotional aspect
of marketing, and the design and management of learning activities.
The most extensive recent studies of motivational orientation (factor
analytic studies using Roger Boshier's Education Participation Scale)
yielded a striking degree of similarity in findings. Six factors were
identified: Social relationship, external expectation, social
welfare, professional advancement, escape/stimulation, and cognitive
interest. Further study of relationships between the motivational
factors and participant and program characteristics revealed little
correlation. It can be concluded (1) that Cyril Houle's three-factor
typology of the adult learner (goal oriented, activity oriented, and
learning oriented) can no longer be considered an adequate
representation of reality, (2) that major orientation factors appear
to be valid only for participants generally, and (3) that most people
appear to participate in adult education for mixed reasons, some of
which are unrelated to learning per se or to course content. The
research should sensitize planners to the variety and complexity of
the motives that underlie participation in continuing education.
(Implications for program development, broad-scale needs assessment,
marketing, and management of learning environments are discussed.)
(JT)

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Why Adults Participate in Education: Some Implications
for Program Development of Research on Motivational
Orientations*

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Introduction

Two cardinal principles of adult education are that programs should be

designed on the basis of needs-assessments and that learning activities should

be compatible with the needs and learning styles of adults. Needs and interests,

of course, are closely related to motivations for participation. Motivational

orientations might be defined as constructs that identify the underlying

structure of the diverse reasons that people give for continuing their edu-

cation. Because motivational orientations reflect learner needs and inter-

ests, the research on this topic appears to have important implications for

the program development process.

The question of why adults participate in education has long been of

interest to adult educators. Prior to 1961, most conceptualizations of this

fundamental question were primative. Early efforts to identify motives re-

lied mostly on crude checklists of reasons for participation or on direct

questioning of persons who often were not fully aware of their reasons for

participation. In 1961, Cyril Houle published The Inquiring Mind (5), in

which he reported on his efforts to identify the basic structure underlying

the diverse reasons that people give for participating in adult education.

On the basis of in-depth interviews with 22 continuing learners, Houle

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formulated a three-factor typology. Houle's three types of adult learner include the Goal Oriented, Activity Oriented and Learning Oriented. Briefly, the goal oriented learner uses adult education as the means to a fairly clear-cut or predetermined end. Learning is pursued only if it can be put to use. The Activity Oriented learner participates primarily for social reasons, such as to be with others, engage in some interesting activity or meet new friends. Significantly, the content of the educational program is of secondary importance for this kind of learner. Finally, the adult who is Learning Oriented participates mainly for the sake of learning or knowledge itself. For such people learning is a natural and continuous part of living.

Houle's provocative study lead to a burgeoning of research activity concerned with motivational orientations. Most of the subsequent research has attempted to test and refine Houle's basic concepts. The best research has employed carefully developed measuring instruments and the statistical technique of factor analysis to probe the underlying structure of reasons for participation. In a recent review, Boshier (1) described fourteen studies since 1964 which employed factor analysis of a motivation instrument.

The most extensive recent studies (2) (3) (7) have yielded remarkably similar findings with very different populations of adult learners in the U.S., New Zealand and Canada. The population for the U.S. study (7) was 611 adults enrolled in a variety of evening credit courses at Glassboro State College in New Jersey. The New Zealand study (2) was based on responses from 233 adults in a variety of programs sponsored by three different institutions. The Canadian study population (3) consisted of 242 participants in non-credit evening classes conducted by two public school

systems and by the University of British Columbia. All three studies used

the Education Participation Scale (EPS), a highly reliable instrument

developed by Roger Boshier in New Zealand (2).

Before turning to the findings, it is important to review briefly the

nature of factor analysis. This is a very complex statistical procedure.

The simplest technical description I could find is this:

> "Given an array of correlation coefficients for a set of variables,
> factor analytic techniques enable us to see whether some underlying
> pattern of relationships exists such that the data may be 're-arranged'
> or 'reduced' to a smaller set of factors or components that may be
> taken as source variables accounting for the observed interrelations
> in the data." (8:209)

Put more simply and in relation to the EPS questionnaire, factor

analysis is a way of clustering related scale items so as to yield separate,

independent constructs that reflect the underlying structure of responses

to the instrument. The clusters, of course, are called factors. The

factor names or labels are determined by the content of the items that

cluster together in each separate factor.

Motivational Orientation Findings

As noted above, there is a striking degree of similarity in the

findings of factor analytic studies of motivational orientations. However,

inasmuch as there are some variations among studies, I will base the

discussion of findings mainly on the results obtained by Morstain and

Smart (7) at Glassboro State College here in New Jersey.

Morstain and Smart identified six factors which they labelled Social

Relationships, External Expectations, Social Welfare, Professional Advance-

ment, Escape/ Stimulation and Cognitive Interest. (See attachment)

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Social Relationships, which Boshier called Social Contact (2), reflects a desire to develop or improve one's relationships with other people. Individuals who score high on this factor indicate a need to make new friends, participate in group activities, and improve their social functioning.

External Expectations clearly reflects a degree of compulsion or pressure external to the individual to participate in educational activities. The items suggest that the individual is complying with the requirements or suggestions of someone else or of some agency or organization.

Social Welfare is indicative of an altruistic concern for other people, community betterment, or for mankind generally. Persons who score high on this factor see education as preparing them for service to others or for participation in community affairs.

Professional Advancement is strongly associated with improving one's occupational performance and status. The items reflect a concern for acquiring useful knowledge, credentials, and job-related skills.

Escape/Stimulation comprises two related dimensions—a need to escape from routine, boring or frustrating situations and a desire to find intellectual stimulation—to "stop myself from becoming a vegetable"—as one EPS item puts it.

The final factor, Cognitive Interest, is identical to Houle's conception of the learning oriented participant. High scorers on this dimension value knowledge for its own sake rather than for instrumental purposes. For such people, learning is an integral part of living.

An immediate conclusion that one might draw from these findings is that the dynamics of motivation are more complex than Houle originally

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envisioned. While Cognitive Interest is identical with Houle's Learning

Oriented category, the other factors are much more concrete than Houle's

broad categories of goal and activity orientation.

Relationship to Learner Characteristics and Program Content

While the motivational orientation literature has focused mainly on

identifying the general underlying structure of motivations, some attempts

have been made to correlate motivational factors with participant and pro-

gram characteristics. In reviewing these correlations, one is impressed

principally with how little they reveal. In general, individual charac-

teristics such as sex, age and socio-economic status are only weakly

associated with the motivational orientation factors. In other words,

each of the six orientations seems to be equally important for men and

women, younger adults and older adults, and people of relatively low as

well as relatively high socio-economic status. There are, however, a few

variations that are worth noting.

Before describing variations in importance for different groups, it

should be noted that adult learners in general place the most importance

on reasons for participation related to Cognitive Interest and Professional

Advancement. Escape/Stimulation and Social Relationships tend to be rated

least important (7:90). Interestingly, the mean importance scores for all

factors, including Cognitive Interest and Professional Advancement, are

rather low, ranging for example from 2.6 to 5.8 on a nine point scale

(7:92). One logical interpretation is that most people have mixed motives

for participation, which tend in general to depress the importance ratings

for individual scale items.

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Morstain and Smart (7) examined the relationsips between sex and age and mean importance scores for each of their six motivational factors. They found that younger participants had somewhat higher mean scores on the Social Relationships factor and that men scored slightly higher than women on the External Expectations dimension. There was a slight tendency for women to place more importance on Cognitive Interest items.

Boshier (3) reported correlations between his factors for a random sample of 76 non-credit evening class participants. Among other things, he found a modest tendency for younger adults to enroll for External Expectations reasons and for older people to enroll for Cognitive Interest. In addition, people with less formal education and lower occupational status were more likely to enroll for Professional Advancement reasons.

While these differences in motivation are statistically significant, they are not great enough to have much practical significance for program planners. It is particularly worth noting that the data do not support common assumptions based on sex-role stereotypes. Women and men, for example, are equally likely to enroll for Professional Advancement as well as for Social Welfare and Social Relationships reasons.

One of the most interesting and important findings for program planners is Boshier's unpublished evidence that motivational orientations are only moderately associated with course content. Students in a non-credit acting class, for example, scored fairly high on Escape/Stimulation, but they scored even higher on Social Welfare. Boshier concluded that motives for participation and subject matter are related, but that adult learners enroll for mixed motives, some of which are not related to course content.

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Conclusions Based on the Research Evidence

The findings of the motivational orientation research suggest the following principal conclusions:

(1) Studies in different countries with different populations of learners in different institutional settings have yielded very similar results. We can be reasonably confident that the research has identified important motivational factors underlying the general phenomenon of participation in comprehensive programs sponsored by school systems, colleges, and universities.

(2) Houle's three-factor typology, while a very useful starting point, can no longer be considered an adequate representation of reality. The recent research indicates that motives for participation are more complex than Houle originally envisioned.

(3) The major orientation factors, with some slight variations, appear to be valid for participants generally -- that is, they tend not to be differentially associated with individual characteristics such as age, sex, educational level and socio-economic status. Future research, however, may reveal motivational differences related to other variables, such as occupation, which have not been studied.

(4) Finally, most people appear to participate in adult education for mixed reasons, some of which are unrelated to learning per se or to course content. Many adults are constrained to participate by external demands while others respond to inner needs for social contact or intellectual stimulation. Motives cannot be inferred solely on the basis of course content or the nature of the learning activity.

Implications for Program Development

On the most general level, the major practical implication of the motivational orientation research may be its value in sensitizing program planners to the diversity and complexity of participant motivations. Pure logic would suggest that adults enroll in a course or other learning activity for the simple reason of acquiring the knowledge or skills inherent in the subject matter. In reality, however -- as my own research on disadvantaged adult learners (6) has also demonstrated -- people are not purely logical and participation in adult education reflects a variety of human needs, some of which are unrelated to the acquisition of skills and knowledge.

Obviously, this does not mean that program content or serious learning are unimportant concerns for learners or program planners. Engineers who enroll in an advanced course on pollution control technology want to learn about pollution control, but they may also be strongly motivated by social welfare concerns and by a desire for social contact with stimulating colleagues. Every adult educator can think of similar examples. The questions is, how can we use our understanding of the nature and diversity of learner motivations to improve our programming activities? I think there are several practical implications related to broad-scale needs assessment, program marketing, and the management of learning environments.

Broad-Scale Needs Assessment

Needs assessments vary in purpose and specificity. One can focus on the broad needs and interests of the clientele for an entire agency or

general programming area or on specific learning needs related to particular courses or other learning activities. There are also many ways to secure information on learning needs as the basis for program planning, including expert opinion, task analysis, testing, review of census and labor market data, and client surveys. The motivational orientation research appears to be most relevant to broad-scale needs assessment and to procedures for obtaining information on needs directly from potential participants.

At the agency level -- that is for the University Extension Division's clientele as a whole -- the motivational orientation findings described here can probably be taken as valid indicators of general needs and inter- ests. The fact that many studies of the general clientele for university extension and related programs have yielded similar findings provides strong support for this contention. The same reasoning would probably also apply to the University Extension Division's Department of Continuing General Education, which offers programs aimed at the general public. The main implications of the motivational research for the University Extension Division as a whole seem to related primarily to marketing and the design and conduct of learning activities. I will turn to these topics very shortly.

For more specialized programming activities, the general motivational findings are suggestive but not concrete enough to provide much help for program planning purposes. Lawyers, nurses, engineers, social workers and other clientele groups for continuing professional education probably differ from the general adult public in regard to the importance of different motivational factors. While needs assessment for such specialized groups

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should emphasize the identification of learning needs, it is important for program planners to be sensitive also to the nature of underlying motivations for participation. Because client surveys are a major source of information for broad-scale needs assessment, I will briefly describe two practical strategies for securing information on motivational orientations from specialized target groups.

One very simple strategy for obtaining data on the nature of motivational orientations is to adapt selected items from the EPS instrument for use in a general needs assessment questionnaire. This can be accomplished by selecting two or three EPS items from each of the six factors or for particular factors judged most relevant to the nature of the target group or program. The EPS items can easily be re-worked into various question formats or retained in scale form to provide an indication of the importance for a particular target group of specific motivations for participation.

A second, but perhaps less practical strategy, is to administer the entire EPS instrument to a population or random sample of participants or potential participants. The EPS can be completed easily and quickly by virtually anyone. To obtain a measure of the relative importance of each of the six motivational factors, the program developer could simply compare the magnitude of the mean factor scores. To illustrate, the Social Welfare factor contains six items on a four point scale (the original EPS had nine points) from "No influence" to "Much influence." Using a computer or hand calculator, we can sum the individual scores for all six items, divide that value by six (that is, by the number of items in the factor), and finally divide the gross factor value by the number of individuals in the sample

to obtain a mean importance score. The procedure can then be repeated for

the other five factors and the means compared to assess the relative impor-

tance of each motivational factor for a particular target population of

learners. In addition to comparing mean factor scores, one could also

compute the mean scores for each EPS item. Individual items with unusually

high mean values would signal important needs or interests of a more

concrete nature than the general factors.

Marketing

Since adult education has a service to offer and lacks a captive

clientele, it seems appropriate to borrow the term marketing from the

business world to refer to the process of effectively reaching the clientele

we wish to serve. Marketing experts (4) refer to the four P's of product,

price, promotion and place. Needs assessment, of course, is fundamental to

effective marketing and in theory at least determines the product or educa-

tional service that is offered to potential adult learners. A needs assess-

ment may also have implications for price, promotion and place. The question

of needs assessment aside, the findings of the motivational orientation

research appear to have some broad implications for the promotion side of

marketing.

In promoting our courses and programs, we attempt to communicate the

nature of our services and also to appeal to the underlying needs or moti-

vations of our clientele. Undoubtedly most of us can be much more sensitive

and creative in appealing to client motivations than we have been. The

motivational orientation research is helpful here because it indicates that

motives for participation are complex and varied and because it has

identified six specific motivational factors that impel adults to continue their education.

There are many ways we can make use of the motivational orientation findings in promoting programs   much depends on the nature of the particular program and i   .iti. .._entele and on the communication medium used for promotion purposes. Nonetheless, there seem: to be some general principles worth taking into consideration.

(1) Great emphasis should be given to the one motivational orientation factor that most closely corresponds to the nature and purpose of the educational activity. For occupationally oriented programs, this might be Professional Advancement; for social or civic action programs, Social Welfare motivations might be stressed. Personal development and leisure time programs might emphasize Escape/Stimulation. This may sound like obvious advice, but it is not always followed in practice. The EPS items can be used as a source of specific content for promotional communications.

(2) An appeal should be made to as many motivational orientations as possible. For example, health professionals may be motivated to continue their education for Cognitive Interest and Social Welfare reasons as well as for Professional Advancement. Promotional materials that appeal to a variety of legitimate motives are much more likely to be effective than those with a narrow message.

(3) For the adult population at large, the most important motivational orientations are Cognitive Interest and Professional Advancement. This suggests that the central theme for mass promotional activities aimed at the general public should be the intrinsic rewards of learning and the

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extrinsic rewards in the work world of increased competence and higher

occupational status. Of course, the latter applies only to those adult

education agencies like the University Extension Division at Rutgers with

a major commitment to occupationally-oriented programming. For general

interest community programs the key themes might be Cognitive Interest and

Escape/Stimulation.

(4) It is clear that many adults, even those who participate in highly

technical or work-related programs, are motivated at least in part by

Social Relationships and Escape/Stimulation reasons. Promotional materials

should recognize these needs by conveying the message—perhaps pictorially

rather than in words—that adult education is not merely schooling for

aging pupils, but an enjoyable activity that offers opportunities for

stimulating interaction with other adults.

Implications for the Management of Learning Environments

In regard to the design and conduct of learning activities, the moti-

vational orientation research serves to underscore the importance of well-

established principles of adult education programming. It is generally

agreed that program planning should take account of the whole person and

the diversity of needs and interests that he or she brings to the learning

situation. The motivational research has identified or at least confirmed

two basic needs that are not always addressed in planning and conducting

educational programs. One is the need for meaningful social contact and

the other the need for intellectual stimulation.

There are many ways to enhance the social climate of learning

activities, including the use of participatory learning methods and the

creation of a physical and psychological environment that is relaxed and conducive to open communication and interaction. The experienced director of a large and flourishing community adult education program recently asserted—only half kiddingly—that the most important factor in program success is the coffee pot.

There are also of   se many tested techniques for making adult learning interesting nd r   ulating, including the use of a variety of learning formats and media and emphasis on learner-centered and paticipatory methods. Excessive reliance on formal lectures is widespread in adult education and may well be the major reason why so many adults drop out of programs, never to return again.

Finally, it is pertinent to note that many adults are not truly volunteers for learning but participate largely because of external expectations on the part of employers or other organizations or agencies. This is increasingly true in the helping professions because of mandatory continuing education requirements. While not all professionals subject to mandatory education requirements are reluctant learners, those who are will present an increasingly serious challenge to program planners who do not make a simple equation between participation and learning.

Conclusion

While the motivational orientation research does not provide us with any easy prescriptions for programming success, it does suggest some broad directions for more effective program development, particularly in relation to needs assessment, the promotional aspect of marketing, and the design and management of learning activities. If nothing else, the research

should sensitize us to the variety and complexity of the motives that underlie participation in continuing education. As in most fields of professional practice, we probably know more than we think we do and we certainly know more than we put to use.

MOTIVATIONAL ORIENTATION FACTORS*

Factor 1 — Social Relationships

EPS Item No.		Loading
14	To fulfill and need for personal associations and friendships	.71
15	To make new friends	.69
31	To improve my social relationships	.64
17	To participate in group activity	.62
9	To be accepted by others	.60
26	To become acquainted with congenial people	.51
33	To maintain or improve my social position	.50
19	To gain insight into my personal problems	.44
2	To share a common interest with my spouse or a friend	.41

Factor 2 — External Expectations

40	To comply with instructions from someone else	.81
6	To carry out the recommendation of some authority	.78
36	To comply with the suggestions of someone else	.67
32	To meet with some formal requirements	.54

Factor 3 — Social Welfare

29	To improve my ability to serve mankind	.73
22	To prepare for service to the community	.70
3S	To improve my ability to participate in community work	.66
23	To gain insight into human relations	.65
4	To become a more effective citizen	.57
11	To supplement a narrow previous education	.41

*Adapted from B. Borstein & J. Smart, "Reasons for Participation in Adult Education Courses: A Multivariate Analysis of Group Differences." Adult Education, 24 (Winter, 1974). The EPS item numbers have been changed to correspond with the numbering on the 40-item revised version of Boshier's Educational Participation Scale. Six items no longer included in the EPS but which loaded on the above factors have been deleted here.

Factor 4 — Professional Advancement

EPS Item No.		Loading
10	To give me higher status in my job	.66
3	To secure professional advancement	.66
15	To keep up with competition	.55
18	To increase my competence in my job	.52
20	To help me earn a degree, diploma or certificate	.51
30	To keep up with others	.43
13	To acquire knowledge that will help with other courses	.41

Factor 5 — Escape/Stimulation

5	To get relief from boredom	.73
28	To get a break in the routine of home or work	.69
27	To provide a contrast to the rest of my life	.61
8	To overcome the frustration of day-to-day living	.58
12	To stop myself from becoming a vegetable	.53
16	To escape the intellectual narrowness of my occupation	.46
34	To escape an unhappy relationship	.44
21	To escape television	.41

Factor 6 — Cognitive Interest

37	To learn just for the sake of learning	.66
1	To seek knowledge for its own sake	.62
7	To satisfy an inquiring mind	.57

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