

Analysing the barriers to adult learning specifically for education, training, and development practitioners (ETDP) in a South African setting, using Knowles' (1975) principles of adult learning

by

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Analysing the barriers to adult learning specifically for education, training, and development practitioners (ETDP) in a South African setting, using Knowles' (1975) principles of adult learning.

I declare that the above dissertation is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

I further declare that I submitted the dissertation to originality checking software and that it falls within the accepted requirements for originality.

I further declare that I have not previously submitted this work, or part of it, for examination at Unisa for another qualification or at any other higher education institution.

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ABSTRACT

This research explores the barriers of adult learners who engage in occupationally directed education programmes in South Africa based on Malcolm Knowles' principles of adult learning. The South African government has been aligning the support of a skilled workforce to various national policies and objectives, such as the National Development Plan (NDP). Unfortunately, adult learners experience overlapping barriers to accessing and completing new learning opportunities while trying to balance learning with work, education, and everyday life. This study used a qualitative research design to explore the lived experiences of fifteen adult learners who completed either the National Certificate or National Diploma in Occupationally Directed Education, Training and Development Practices (ODETDP) from a selected education and training consultancy. Five major themes emerged from the data that provided insight into participants' experiences: learning experiences, barriers to learning, positive aspects of learning, learner motivation and real-time facilitation. Participants noted personal satisfaction and career development benefits were key outcomes of adult learning, but also expressed several environmental, intrapersonal and personal barriers for adult learners. These significant barriers included limited institutional support, mental fatigue and multiple life roles.

A particularly noteworthy contribution of the study is its focus on workplace-oriented adult learning, an area that has been largely neglected in the literature. Adult education research tends to focus on formal educational settings and community-based learning. In contrast, this study emphasises how institutional inflexibility, a lack of workplace accommodation, and unstructured peer working conditions can create challenges for workplace-oriented learning. It also illustrates how both intrinsic and extrinsic motivation shift over time during the learning process and how intentional facilitation and peer interaction influence learner success.

The results align with Knowles'(1975) principles but indicate that they must be nuanced to the learner's socio-economic context, work status, and learning context. The study argues that adult learning programmes ought to be expressly designed to account for the diverse modes of delivery, purposeful orientation, and positive learning environments that support collaborative and self-directed learning. These findings

offer a far more situationally robust understanding of adult learning in South Africa and guide curriculum design, institution policy, and workplace approaches.

KEYWORDS: Adult learning, occupational education, Knowles' andragogy, barriers to learning, motivation, workplace training, South Africa

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LIST OF ABBREVIATIONS

CET	Community Education and Training
CHE	Council on Higher Education
CSIR	Council for Scientific and Industrial Research
DHET	Department of Higher Education and Training
ESOL	English for Speakers of Other Languages
ETD	Education, Training and Development
ETDP	Education, Training and Development Practitioners
FETQS	Further Education and Training Qualifications Sub-framework
GDP	Gross Domestic Product
GSEM	Generalised Structural Equation Modelling
HEI	Higher Education Institutions
HEQSF	Higher Education Qualifications Sub-framework
HRD	Human Resource Development
MAS	Metacognitive Awareness Scale
MBSR	Mindfulness-Based Stress Reduction
NDP	National Development Plan
NIDS	National Income Dynamics Study
NIDS-CRAM	National Income Dynamics Study: Coronavirus Rapid Mobile Survey
NOLS	National Open Learning System
NQF	National Qualifications Framework
NSFAS	Student Financial Aid Scheme
OQSF	Occupational Qualifications Sub-framework
PSET	Post-School Education And Training
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SAQA	South African Qualifications Authority
SDL	Self-directed learning
SETA	Sector Education and Training Authorities
THCSDL	Transformative and Holistic Continuing Self-Directed Learning

CHAPTER 1: INTRODUCTION AND OVERVIEW OF THE STUDY

1.1 INTRODUCTION

Adult education is central to addressing the socio-economic reality that has persistently shaped post-apartheid South Africa. South Africa continues to experience socio-economic inequalities, significant unemployment, and changing labour-market demands (Vally and Motala, 2022). This emphasises the need to deliberately build a skilled and productive workforce through occupationally directed education and training. In this context, this study aims to investigate the learning experiences of adult learners who have participated in an accredited learning programme and to identify the perceived barriers they encountered. The research is founded in Knowles' (1975) principles of adult education and learning. It seeks to investigate the barriers that adult learners perceive along their educational journey and how these experiences might inform practices of education, training, and development (ETD) that are more inclusive and responsive.

1.2 BACKGROUND OF THE STUDY

The National Development Plan (NDP) has been developed by the South African government to reduce poverty and inequality in the country by 2030. Education and training play a significant role in achieving the NDP's goals, as a capable workforce accelerates economic growth and transforms the economy. This, in turn, improves the standard of living of the people of South Africa. This is achieved by creating an inclusive society that benefits the citizens and allows individuals to reach their full potential (National Planning Commission, 2012).

The Skills Development Act 97 of 1998 (South Africa, 1998) provides a framework for the development of workplace skills. The Skills Development Levies Act provides for the necessary funds to be made available through a levy-grant scheme. These Acts also make provision for the establishment of 21 sector-specific Sector Education and Training Authorities (SETAs) to administer the scheme's funds and manage the skills development process. The National Skills Development Strategy III aims to improve

the effectiveness and efficiency of skills development in the country (DHET, 2019). This strategic document serves as an example of the programmes and outcomes which should be implemented and achieved by SETAs. The strategic documents further serve as a mechanism to address the scarce and critical skill needs in the country, provide a way for poor individuals to access post-secondary education and training and alleviate unemployment through the development of work-specific competencies. The development and improvement of skills for both employed and unemployed people can occur at workplaces with the support of the SETAs through the implementation of learnerships, internships, apprenticeships, and other skill development programmes (DHET, 2019).

Learning and development in the post-school education and training system play a vital role in responding to the complexities of the workplace and the growing impact of globalisation in the economy. At the microlevel, investing in employee training and development equips employees with the skills to fulfil their job responsibilities and enables employers to increase the likelihood of becoming and remaining competitive and financially sustainable. The importance of this study can be acknowledged when one recognises that the development of human resources and the individual is one way of contributing to and integrating with other development strategies geared towards the economic and social upliftment of society (National Planning Commission, 2012). Although these policies and legislative frameworks aim to expand access to education and workplace skills development, adult learners continue to experience barriers that affect participation, retention, and completion of learning programmes. These barriers may include financial constraints, limited workplace support, time pressures, digital access challenges, and difficulties balancing work, family, and learning responsibilities. As a result, the existence of supportive national frameworks does not necessarily guarantee successful learning outcomes for adult learners within the ETD context. This highlights the need to better understand the lived experiences and barriers encountered by adult learners in workplace-based learning environments.

This study investigates the experiences of adult learners and the barriers to learning experienced by Education Training and Development Practitioners (ETDP) who attended a learning programme with an accredited skills development provider.

education, ETDP refer to individuals involved in facilitating, assessing, moderating, designing, and supporting learning and skills development within education and workplace training environments (South Africa, 1998). To achieve this, Knowles' (1975) principles of adult learning were utilised to assess the extent to which barriers to adult learning were experienced. This was accomplished by identifying the perceived barriers to learning.

Jain, Budlender, Zizzamia, and Bassier (2020) examined employment and poverty in South Africa in 2020, in particular around the impact of the COVID-19 pandemic on the labour market, using the National Income Dynamics Study: Coronavirus Rapid Mobile Survey (NIDS-CRAM). The research showed that the South African economy had lost about 40% of its active labour force between February (pre-lockdown) and April (during lockdown) 2020, and that half the population had experienced these losses due to terminations. Alarmingly, about 20% of employees who were temporarily laid off received relief funding. In total, a third of displaced workers received little or no social assistance from the state or employers, including unemployment grants, food parcels, and income support, which represents a financially precarious situation. The research demonstrated significant disparities in the distribution of employment losses noted, as women, low-income earners, informal workers and manual labourers were drastically affected, thereby widening previous socio-economic inequalities. The survey comprised a sample of 7,074 adults aged 18 - 64 years. Jain *et al.* (2020) developed a new employment typology to account for labour market behaviours during this difficult period, consisting of four types of workers:

- *Not employed*: A person did not work for pay or profit, irrespective of their willingness to work.
- *Temporarily laid off*: A person does have an active employment relationship but reports zero working days and earnings.
- *Paid leave*: A person retains their employment and is receiving pay but has not worked any days.
- *Actively employed*: A person has active economic activity for pay or profit.

The analysis revealed that in the period of loss of income in the lockdown, between 20% and 33% of people who lost their jobs were reported as impoverished, equating to a population range estimate of 1-1.7 million. If dependents are included, between 3 and 5.5 million people were rendered impoverished due to these employment losses. Jain et al. (2020) estimate that the total number of job losses, February to April 2020, was 5.23 million. Clearly, the labour market shock and socio-economic disruption caused by COVID-19 have presented significant challenges for South Africa, demonstrating the critical need for specific workforce development and inclusive social protection policies and strategies (Jain *et al.*, 2020).

According to Statistics South Africa (2020), in June 2020, the total gross earnings paid to employees decreased by R82,2 billion or (-11,3%) from R729,4 billion in March 2020 to R647,2 billion. Furthermore, the findings indicate the effects of the COVID-19 pandemic on South Africa's economy and labour market. Due to the limitation of movement enforced during the national lockdown, only some people were able to work, either at their usual physical places of work or remotely. Valid responses from 2,688 were received for the study. The findings showed that 60,2% of the respondents were employed permanently during the national lockdown, followed by those in self-employment (9,5%) and those who were employed on a contract basis (7,9%). About 8,1% lost their jobs or had to close their businesses, 1,4% became unemployed, and 0,5% were out of the labour force. Of those who were unemployed, 84,4% remained unemployed, 9,3% started working during the lockdown, while 5,9% were no longer in the labour force. The findings showed that the majority of respondents whose businesses closed because of the national lockdown were in Gauteng (42,0%), followed by Western Cape (32,6%). The rest of the provinces accounted for shares below 10%, ranging from 7,3% for KwaZulu-Natal to 1,6% for both Free State and Northwest. The study further indicated that for those who experienced a loss of employment or had to close their businesses during the national lockdown, 38,3% indicated that the place of work shutting down or the business closing, was the main reason for job loss or business closer; 30,6% indicated lack of clients as the main reason; and only 1,0% of them stated dismissal as the main reason, (Statistics SA, 2020).

One of the contributing factors to achieving the intended growth and sustainability of the South African economy is an educated workforce that can meet the labour market's scarce and critical skills needs and be sufficiently agile to adapt to and support organisations in navigating uncertain futures. Occupations in high demand by the South African economy will require the post-school education and training system to plan how to encourage adult learners to enter and complete learning and development opportunities in industries identified as crucial to economic growth. Encouraging adult learners to embrace the journey of lifelong learning is valuable, given that the nature of jobs is constantly changing, as illustrated by the effects of the COVID-19 pandemic (DHET, 2014).

Through the provision of best-practice guidelines, it is anticipated that the research findings of this study will assist policy makers and practitioners alike in the education, training and development sector in formulating policies and implementing practices that place learners at the centre of the learning process. Providing a quality educational experience for adult learners must be treated as a collective effort involving policymakers, education, training, and development practitioners, learners, employers, and the support structures for adult learners.

This study demonstrates the vital role of adult education in enabling individuals to improve their socio-economic status amid South Africa's persistent inequalities. When learning opportunities become accessible, adult education enables upward mobility and enhances learner outcomes: it can help lead learners from the world of poverty to a better, more secure and improved standard of living (DHET, 2014). This study promotes the value of adult education not only for personal and professional development but also as a learning process that changes learners' mindsets and fosters lifelong learning throughout their lives. As implied in the quote above, it promotes education as a means of empowerment, social inclusion and active participation in a changing and growing economy.

Adult learners come from diverse backgrounds, they have different needs, and they take different durations of time to complete a learning intervention. This aligns with the aim of the study to develop an understanding of Knowles' (1975) principles of adult

learning and to use these principles to identify barriers to adult learning. Despite the recognised value of adult education, limited research has specifically examined the barriers ETDPs face in workplace-based learning environments in South Africa. Existing studies often focus on formal higher education contexts, with less attention given to workplace-oriented adult learning and the challenges experienced by ETDP practitioners.

1.3 PROBLEM STATEMENT

The Department of Higher Education and Training (DHET, 2019) has recognised the need to improve access and completion rates for adult learners in post-school education and training (PSET). In terms of strategic prioritisation, this is aligned to the objectives of Outcome 5 of the National Development Plan (NDP), where the aim is to achieve a skilled and capable workforce to support an inclusive growth path (DHET, 2019). Although this has been recognised, there remains a challenge: adult learners who enrol in PSET programmes and access its opportunities are not completing their qualifications and credentials, particularly in workplace-based learning contexts.

Moreover, there are high attrition rates among adult learners, particularly in work-integrated learning and on-site programs. The implication is that learning-related structural and individual learner challenges remain either unaddressed or poorly addressed. Research indicates that barriers are not only institutional but also personal and socio-economic, which can adversely affect fully benefit from education and training interventions (Banks & Dohy, 2019). This has implications for National Skills Development priorities, given that economic growth depends on a qualified, adaptable, and resilient workforce for South Africa's economy and growth.

This study focuses on Education, Training and Development Practitioners (ETDPs), a major stakeholder group in South Africa's learning and development sector who engage in workplace learning to upskill and stay professionally relevant. Research on the barriers to learning for adult learners with specific reference to ETDPs in accredited workplace learning programmes is limited in the South African context. Without a

greater understanding of these barriers, learning interventions may be created that do not address the needs of adult learners.

The study adopts Knowles' (1975) principles for adult learning (self-directedness, previous experience, readiness to learn, orientation to problem-solving, and intrinsic motivation) as an analytical lens through which to view the lived experiences of adult learners. This provides a theoretically sound framework for the ways adult learners construe and act upon particular barriers to learning in professional development programmes. However, despite the growing literature on adult learning and workplace-based education, limited research has specifically examined the barriers ETDPs face as adult learners in workplace-based learning contexts in South Africa. Existing studies tend to focus more broadly on adult learning participation and PSET challenges, with less emphasis placed on the lived experiences of ETDP practitioners in accredited workplace learning programmes.

Therefore, this study seeks to identify and investigate the barriers to learning experienced by ETDPs, and to contribute to the knowledge pool on adult education. It is hoped that knowledge gained from investigating barriers to learning will inform the design and evaluation of workplace learning interventions, enabling more responsive, inclusive, and effective workplace learning practices. The research supports national and global goals of developing a skilled labour force through lifelong education and training and supporting human capital development (Mallows, 2018; DHET, 2019). Limited research has examined barriers to adult learning among ETDPs in workplace-based learning contexts in South Africa. Knowles' (1975) principles of adult learning were considered appropriate for this study because the framework focuses on adult learners' experiences, motivations, readiness to learn, and self-directedness within workplace-based learning environments.

1.4 AIM OF THE STUDY

The aim of this study is to investigate the barriers to adult learning among ETDPs in workplace-based learning contexts in South Africa, using Knowles' (1975) principles of adult learning as a theoretical lens..

1.5 RESEARCH OBJECTIVES

The research objectives and questions were developed directly from the identified research problem and were intended to examine how barriers to adult learning are experienced and understood within workplace-based occupational learning environments through the lens of Knowles' (1975) principles of adult learning.

- II. To examine how the barriers to adult learning are conceptualised in the existing literature.
- III. To analyse how Malcolm Knowles' (1975) principles of adult learning are conceptualised in the existing literature.
- IV. To identify the barriers to adult learning experienced by the study participants.
- V. To explore the relationship between the barriers to learning experienced by the learning programme participants and the principles of adult learning formulated by Knowles (1975).
- VI. To propose recommendations for minimising barriers to adult learning, drawing on Knowles' (1975) principles of adult learning.

1.6 RESEARCH QUESTIONS

RQ1: How are the barriers to adult learning conceptualised in the existing literature?

RQ2: How are Malcolm Knowles' (1975) principles of adult learning conceptualised in the existing literature?

RQ3: What barriers to adult learning are experienced by ETDP participants within workplace-based learning programmes?

RQ4: What is the relationship between the barriers to learning experienced by the learning programme participants and the principles of adult learning formulated by Knowles (1975)?

RQ5: What are the recommendations for minimising the barriers to adult learning, based on Knowles' (1975) principles of adult learning?

1.7 SIGNIFICANCE OF THE STUDY

The PSET, like other sectors, has been significantly affected by the COVID-19 pandemic. The disruption in the academic calendar created a challenge for learning institutions and learners, where learning took place in the physical classroom. As a strategy to mitigate the effects of COVID-19, the Department of Higher Education and Training (DHET) established a National Open Learning System (NOLS), which provides online learning opportunities in the PSET system. National Open Learning System (NOLS) is an effort to expand the government's online learning endeavour within the PSET sector, to ensure an enabling and sustainable learning environment. The PSET's budget for the 2021/22 period stood at R R115.596 868 billion. DHET has indicated their commitment to strengthening and developing the PSET sector by investing in infrastructure to provide quality teaching, learning, research and innovation spaces. The budget currently available for investment in infrastructure projects across the 26 universities during the 2021/22 to 2023/24 period is R9.546 billion. Furthermore, the National Student Financial Aid Scheme (NSFAS) approved budget for 2020/21 is R41.5 billion. This excludes the R6.4billion additional budget approved for National Student Financial Aid Scheme (NSFAS) students. The funding will support expansion of access to the Post School Education and Training Sector and will allow learners to complete their academic year (DHET Budget Vote, 2021/2022).

The South African government takes the need for post-secondary education seriously, as evidenced by the budget allocated at a time when the South African economy experienced great strain as a result of the COVID-19 pandemic. However, investment in any form of education will be affected by the capacity of adult learners to engage actively in the learning process and to transfer their learning to their respective workplaces. This determines a basis for further investment (Groener & Andrews, 2019). One of the ways to improve transfer of learning is to address the barriers to learning in the learning design phase (Burton, Lloyd & Griffiths, 2011).

Barriers to adult learning not only affect the commitment of the adult learner to the learning process, but also retention and learner graduation rates. Employers and the South African Government provide financial support to adult learners to make

available access to post-school education and training available through NSFAS and the Skills Development Levy (DHET, 2019). Similarly, DHET reported graduate statistics obtained from public and private Higher Education Institutions (HEIs), Technical and Vocational Education and Training (TVET) colleges, private colleges, and Community Education and Training (CET) colleges, as well as financial and workplace learning data for the 2019 financial year. According to these statistics in 2019, over 1.2 million students enrolled at public and private HEIs, with the majority of enrolments in public HEIs (1 074 912), while private HEIs enrolled 208,978 students. The target in the NDP is 1.6 million enrolments by 2030. There were 221,942 graduates in public HEIs in 2019, a 2.3% (5,246) decline compared with the number of graduates reported in 2018 (227,188). The number of graduates in private HEIs reached 42,526 in 2019, reflecting a 25.2% (8,554) decrease when compared with 2018 (33,972).

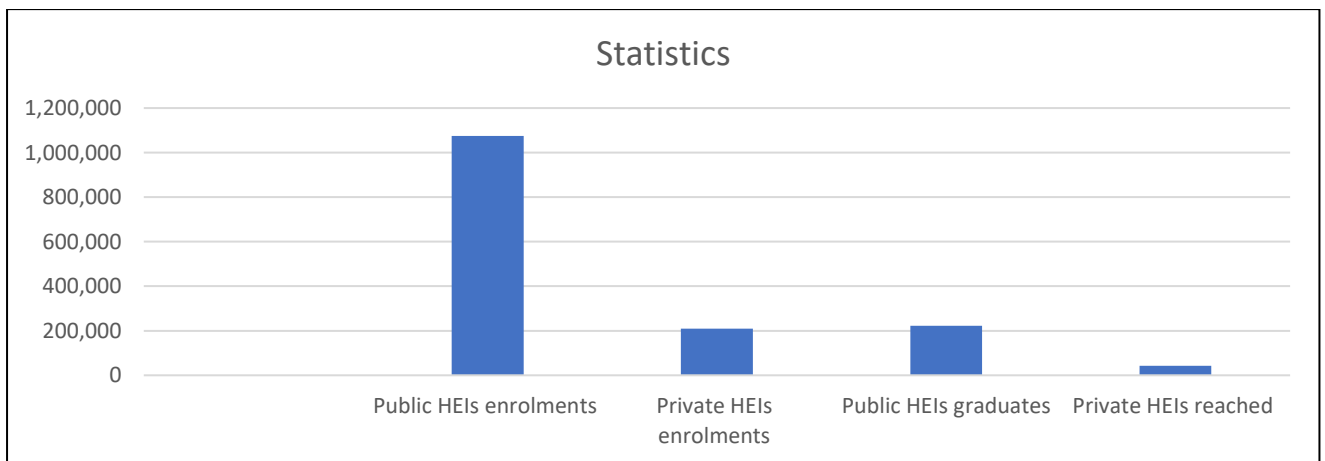


Figure 1. 1: DHET Graduate Statistics in 2019

Source: DHET (2020)

Increased output of well-qualified tertiary graduates will help address the South African skills deficit (DHET, 2016). It is through this type of research that learner support, which minimises barriers to adult learning, can be implemented to increase learners' completion rates year to year. The study aims to contribute to an understanding of why adult learners do not complete the learning programmes they enrol in.

Equally worrying is the fact that academic studies on experiences and barriers to adult learning based on the Education, Training and Development Practitioners perspective in general in Africa and South Africa in particular, are difficult to find. Most of the reported studies on barriers to adult learning are mainly from Europe, the USA, and Asia. It is, however, still doubtful whether research findings from these parts of the world would be applicable in the context of andragogy in South Africa. In addition, there is limited evidence of prior studies that focus on adult learners' trainers – a segment that is deemed to be strategically important in the higher education and training industry in South Africa (DHET, 2016). Based on these identified research gaps, it is evident that a study of this nature is necessary.

Research undertaking of this nature can be expected to have both academic and practical contributions. On the academic side, this study can be expected to contribute new knowledge to the existing body of literature on how the principles of andragogy can be applied to pre-emptively address the barriers to learning experienced by adult learners in South Africa's Higher Education and Training sector. Moreover, this study specifically focuses on the adult learners' trainers within a sector that can potentially influence the effectiveness of the government initiatives to stimulate economic growth through improved educational attainment of working-age citizens. A neglected research context can imply that new insights into andragogy experiences and barriers to adult learning can be expected. Furthermore, this study is also expected to have practical implications and relevance to practitioners and policy makers in South Africa's higher education and training sector.

Academically, this study contributes to the limited South African literature on barriers to adult learning experienced by ETDP practitioners within workplace-based learning environments. The study further contributes to the application of Knowles' (1975) principles of adult learning within workplace-oriented adult education contexts. Practically, the findings may assist training providers, employers, ETDP practitioners, and policy makers to develop more inclusive and responsive workplace-based learning interventions that better support adult learner participation, retention, and completion.

1.8. SCOPE OF THE STUDY

The scope of the study is primarily limited to ETD practitioners who attended the Occupationally Directed Education, Training and Development Practices qualifications, provided by a skills development provider which operates in South Africa.

1.9. LIMITATIONS

Restricted Research Context: The research was conducted with participants in a single accredited Skills Development Provider in South Africa that offers Occupationally Directed Education and Training qualifications. Therefore, the research is context-specific, and the findings cannot be generalised to the population of ETDPs in other training contexts or training providers.

Dependent on Participants' Disclosures: A limitation of qualitative research, especially interviews, is the reliability of the data, as it depends entirely on what, how much, and the depth of participants' responses. The depth and richness of the data depend on what the participant is willing and able to share, which in turn depends on personal, social, and contextual factors.

Influence of Question Design: The questions of the interview followed a predetermined structure; however, the necessity of this may have impacted the participant's interpretation of the question, and therefore, I will argue that the predetermined structure, to get consistency and to enhance validity in asking the same questions, may have influenced the quality and depth of the responses from the participants. This is supported by Queirós *et al.* (2017), who noted that structured interviews can lead to rigidity, inhibiting spontaneity and depth or variation in questions.

These limitations may affect the broader generalisability of the findings, as the study was conducted within a specific workplace-based learning context and relied on a relatively small qualitative sample. In addition, the use of self-reported experiences may have influenced the depth and subjectivity of participant responses. However, despite these limitations, the study remains valuable in providing rich, context-specific insight into the barriers experienced by adult learners within workplace-based ETDP

learning environments. The findings, therefore, remain credible and relevant within the defined context of the study.

1.10. ASSUMPTIONS

The formulation and execution of the research is guided by the following assumptions:

- I. It is assumed that participants accurately recall and reflect on their learning experiences while they are engaged in the learning programme.
- II. It is assumed that participants accurately and reflectively respond when sharing their experiences and perspectives on their own learning journey, and that they do not unnecessarily withhold relevant information or fabricate their experiences

1.11 RESEARCH DESIGN

1.11.1 Qualitative Research Approach

This study utilised a qualitative research design to investigate barriers to adult learning informed through Malcolm Knowles' (1975) principles of adult learning. The qualitative approach is appropriate for understanding adult learners' lived experiences, perceptions, and motivations related to barriers to learning, and is especially valuable for revealing barriers in education and training in the workplace context (Creswell *et al.*, 2019; Hennink *et al.*, 2020).

1.11.2 Population and Sampling

The population consists of adult learners who completed the National Certificate or National Diploma in Occupationally Directed Education, Training and Development Practices. The study sample consisted of 15 participants enrolled in an accredited workplace-based ETDP learning programme. A non-probability purposive sampling strategy was used to select participants with firsthand experience of the learning programme. The sample consisted of adult learners with access through a recognised training provider.

1.11.3 Participants and Site Access

Participants were sourced from a consultancy with an established track record in post-school education and training. A gatekeeper letter from the organisation assisted access to the participants by sending invitations to participate via email on behalf of the researcher.

1.11.4. Data Collection

Data were collected through semi-structured individual online interviews. Open-ended questions prompted participants to reflect critically on their learning journey, yielding rich descriptions of the barriers encountered and of how they perceived the application of adult learning principles in practice.

1.11.5. Data Analysis

The interview transcripts were thematically analysed in NVivo 12 to identify themes and patterns related to learning barriers. The data were sorted into codes and themes based on Knowles' (1975) framework, to enable interpretation of explicit and implicit meanings (Merriam & Grenier, 2019).

1.12. DEFINITION OF KEY CONSTRUCTS

- **Adult education** is the process whereby persons whose *“major social roles are characteristic of adult status and undertake systematic and sustained learning activities for the purpose of bringing about changes in knowledge, attitudes, values, or life skills”* (Darkenwald & Merriam, 1982: 09).
- **Andragogy** is defined as the art and science of helping adults learn (Ekoto & Gaikwad, 2015). It is an ideal of adult learning that respects and accommodates the learner's past experiences and present needs, encouraging and empowering the adult to become an autonomous learner.
- An **adult learner** is defined as an adult twenty-five years of age or older who is enrolled in an accredited academic program for the purpose of engaging in additional education (Aslanian, 2006).

1.13. STRUCTURE OF THE THESES

The following is an outline of the organisation of the dissertation:

Chapter 1: Overview of the Study

This chapter presents an overview of the study. It introduces the research problem, outlines the aim, objectives, and research questions, and highlights the study's significance and contribution.

Chapter 2: Adult Learning and Andragogy

This chapter reviews the relevant literature on adult learning and the theoretical framework underpinning the study. It provides the conceptual and contextual foundation for the research.

Chapter 3: Barriers to Adult Learning

This chapter explores the existing literature on the barriers adult learners face. It sets the stage for the empirical investigation by identifying key challenges within the adult learning environment.

Chapter 4: Research Methodology and Design

This chapter outlines the research methodology and design. It details the research approach, data collection methods, participant selection, and data analysis procedures.

Chapter 5: Presentation of Findings

This chapter presents and interprets the study's findings. It provides thematic insights from the collected data and links them to the study's objectives.

Chapter 6: Conclusions, Recommendations, and Limitations

The final chapter offers a synthesis of the key findings, discusses the research's implications, provides recommendations for practice and policy, and acknowledges the study's limitations.

1.14 CONCLUSION

This chapter provided an overview of the study by presenting the background, problem statement, research aim, and guiding assumptions in relation to the investigation of

barriers to adult learning in the ETD sector. Adult education was contextualised within the framework of national development aims, particularly the NDP and Skills Development legislation. An outline of the research design, including the qualitative approach, participant selection, sampling and data collection methods, was provided as a basis for the more comprehensive methodological discussion attended to in Chapter Three. The importance of a qualitative study on understanding adult learners' experiences in terms of Knowles' (1975) principles of adult learning, which serve as the theoretical lens for this study, was emphasised.

The next chapter presents a review of literature on adult learning and andragogy.

CHAPTER 2: ADULT LEARNING AND ANDRAGOGY

2.1. INTRODUCTION

This chapter provides a critical overview of the literature on barriers to adult learning, specifically addressing ETDPs in the South African context. In framing the discussion using Malcolm Knowles' (1975) principles of adult learning, also known as andragogy, the chapter covers the theoretical foundation of adult learning and the contextual challenges faced by adult learners. The literature reviewed offers a knowledge base in terms of understanding ETDPs' experiences of learning. In addition, the review provides international and local perspectives of adult education, identifies themes of learner challenges, and offers a conceptual framework to theorise the empirical data presented regarding ETDPs in the upcoming chapters.

2.2 EDUCATION, TRAINING, AND DEVELOPMENT IN SOUTH AFRICA

Existing literature, including Knowles (1975); Merriam & Bierema (2014); Merriam (2001), reviewed in this chapter, provides information about the barriers to adult learning, specifically for ETDPs in a South African context, using Knowles' (1975) principles of adult learning.

The White Paper for Post-School Education and Training (2013) was the Government's vision of what the post-school education system would look like in terms of bringing together different institutions of higher learning into one integrated post-school education system, which aims to be achieved by 2030 (DHET, 2014).

Post-school institutions, which DHET oversees, include over 503 institutions, namely: 26 public Higher Education institutions, 131 private Higher Education Institutions, and 50 TVET institutions, 287 registered private colleges, nine CET colleges, and 21 SETAs. The role of DHET is to ensure that learners in the post-school education and training system receive quality learning provision from accredited institutions. This also means that the correct levels of capacity must be in place at these institutions for learners to be successful in their learning endeavours, so that they may contribute positively to the South African economy (DHET, 2019).

South Africa's education system is administered mainly through two national departments: the Department of Basic Education (DBE), which oversees the schooling sector, and DHET, which is responsible for post-school education and training. DHET is a national department which is responsible for setting the goals and framework for the higher education system, as well as funding of the system. Post-school education and training, as defined by DHET, refers to education and training that occurs after the end of compulsory schooling (Grade 9) (STATSSA, 2017).

The National Qualifications Framework Act, No. 67 of 2008, provides for the development of the National Qualifications Framework (NQF) and three respective sub-frameworks. The NQF is an integrated system with three co-ordinated qualifications sub-frameworks: the General and Further Education and Training Qualifications Sub-framework (FETQS), the Occupational Qualifications Sub-framework (OQSF) and the Higher Education Qualifications Sub-framework (HEQSF). The Act also provides for Umalusi to be established as the Quality Council for General and Further Education and Training, as well as the Quality Council for Trades and Occupations (QCTO) and the Council on Higher Education (CHE).

As part of understanding the post-school education system in South Africa, it is necessary to have an awareness of the purpose of the South African Qualifications Authority (SAQA). Although the NQF and SAQA frameworks aim to improve standardisation, quality assurance, articulation, and access within the education and training system, adult learners may still experience barriers relating to access, recognition of prior learning, programme articulation, and progression within workplace-based learning environments. In some instances, administrative processes, entry requirements, and limited awareness of qualification pathways may create additional challenges for adult learners attempting to participate in or complete learning programmes.

This was established through section 3 of the South African Qualifications Authority Act, 1995 (Act No. 58 of 1995). Its purpose is to oversee the development and implementation of the NQF as defined by the National Qualifications Framework Act, 2008 (Act No. 67 of 2008). The NQF is a framework for the standardisation, classification, registration, and publication of national qualifications, learning achievements, training, and outcomes. The NQF has ten levels of qualifications that

provide broad descriptions of the learning achievements or outcomes that are appropriate to a qualification at a particular level (National Qualifications Framework Act 67, 2008).

According to DHET, individuals who possess a tertiary qualification will improve their likelihood of having a lifetime income and quality of life. Furthermore, a large, poorly educated population will result in poor innovative performance, leading to poor labour market output. It is also apparent that despite the much-increased financing of the higher education system in South Africa, it has not been possible to absorb the growing demand for access to higher education opportunities, and therefore to address inequality levels in South Africa (STATSSA, 2017).

The post-school education and training system is meant to contribute to the national human resource and research, development, and innovation priorities to develop a skilled and capable workforce. Planning goals and targets may not necessarily be uniform across private and public institutions of higher learning, and therefore, they cannot be applied across all institutions in the higher education system, as their capacity to deliver is different. Continuous engagement, collaboration, and coordination between DHET and public higher education institutions regarding increasing enrolments and graduate numbers in specifically designated human resource development priority areas is also vital to facilitating progress in meeting the essential skill shortages in our country and achieving targets set out by the national government.

Therefore, there is a need for private and public institutions of higher learning to ensure that their strategy, policies, and funding systems are in alignment with the demands of the economy and create an enabling environment which supports the production of quality professional graduates. The long-term sustainability of public and private institutions in the higher education system is reliant on meeting learner enrolment targets, learner graduate success rates and the preservation of quality learning and teaching experiences. The optimal functioning of private and public institutions is crucial for contributing to the development of the South African economy (DHET, 2014).

The five domains utilised in this study should not be interpreted as independent emergent themes, but rather as analytical and organisational categories derived from the conceptual framing of the study and informed by Knowles' (1975) principles of adult learning. The domains served as a deductive analytical structure to guide the organisation of the literature review and the interpretation of the participants' experiences within workplace-based learning environments. While themes emerged from the interview data through thematic analysis, they were subsequently interpreted and organised within the broader analytical domains to enable alignment between the empirical findings and the theoretical framework. The domains functioned as conceptual organising structures that facilitated analysis of how barriers to adult learning were experienced in relation to Knowles' principles of adult learning. Although the domains formed the analytical lens of the study, the themes were grounded in participant experiences and not imposed as predetermined findings. The relationship between the domains, themes and principles is therefore iterative and interpretive - the principles of adult learning formed the conceptual domains, the domains structured the analysis and the themes represented the experiences of the participants within these domains.

2.3 ANDRAGOGY

Adult learning theory, also referred to as andragogy, has evolved over the years, as more information is learnt about the subject. The word andragogy originates from the Greek word *andragogos*, meaning "*teaching adults*" (Henschke, 2009). It is understood that the term was first introduced by a German high school teacher, Alexander Kapp, in 1833. Kapp argued that education, self-reflection, and educating the character are the first values in human life. As part of the ongoing history of andragogy, is the inclusion of the education of inner, subjective personality (character); outer, objective competencies and learning through self-reflection and life experience. The term "andragogy" was unused for many decades. This is perhaps because adult education was being conducted without the use of a designated term. In the 1920s, Germany began formulating adult learning theories, and another German revived the term andragogy (Henschke, 2009). After World War I, in 1925, Rosenstock-Huessy promoted andragogy as a means for the people of Germany to redevelop themselves and the country. Rosenstock-Huessy was of the view that all adult education

(andragogy) stems from past or historical dimensions. This relates to the notion that past experiences should be analysed to learn from them, so that the same lessons are not repeated (Henschke, 2009). Moreso, while Knowles (1975) emphasises self-directed learning, Merriam & Baumgartner (2020) argue that not all adult learners possess equal levels of autonomy, particularly within socio-economically constrained learning environments.

Although the historical development of andragogy provides important insight into the evolution of adult learning theory, scholars have argued that interpretations of andragogy differ across contexts and traditions. European perspectives tended to emphasise social transformation and collective learning, while North American interpretations, particularly those associated with Knowles, focused more strongly on individual self-directed learning and learner autonomy. This suggests that adult learning theories are not universally applied in the same manner and may be influenced by social, cultural, and workplace contexts.

Loeng (2017) notes that the interpretation of andragogy by Malcolm Knowles, which was considered a North American view of adult learning, was preceded by Alexandra Kapp's (1800–1869) view of andragogy, which was regarded as a European view of adult learning. European and North American views on adult learning were regarded as being different in terms of their social role. Malcolm Knowles' (1975) principles of adult learning placed emphasis on individual development and were practically oriented. Europe considered this to be a narrower approach to adult learning. The Europeans raised questions regarding whether andragogy was to be considered a scientific discipline and whether it belongs to other sciences, like sociology or psychology. Kapp presented a different approach, which placed emphasis on reason and classical Greek philosophy. Kapp's assumption of andragogy is not the theory of how adults learn or how the teaching of adults should take place. To Alexander Kapp, andragogy is a term for education in adulthood. Kapp had a belief in the necessity of education for adults and described qualities which need to be developed both in general and for various selected occupations, which promote the education of adults. This idea of Kapp is like the current idea of developing employability attributes in post-secondary education learners. Kapp is a source for andragogical reflection (Loeng, 2017). European traditions of andragogy were generally more philosophical and

socially oriented, while later American interpretations, particularly those associated with Knowles, focused more strongly on self-directed learning and practical workplace application. This illustrates how adult learning theories may differ across social, cultural, and workplace contexts.

In the 1960s, employers realised the importance of providing employees with tools to perform better in the workplace. From this belief, it emerged that the concept of pedagogy as it was implemented in the 20th century did not fully correspond with workplace-based training that was intended for adult learners. As a result, a need arose to develop educational principles of learning and practices which considered contexts and characteristics that were unique to adult learners (Wolfe, 2016).

Knowles, in the 1960s, introduced principles of adult learning as a field of education that differs from the traditional pedagogical approaches to education. Knowles' (1975) principles of andragogy defined andragogy as the "art and science of helping adults learn." Knowles believed that there are certain aspects within adulthood which require understanding, as this contributes to and shapes how learning occurs amongst adult learners (Wolfe, 2016). Knowles' (1975) assumptions of andragogy were based on a set of principles intended to support adult learning processes. These differences are not based upon the presumed differences in learning capabilities between adults and children; rather, they are based on differences in the nature and purpose of the learning relationship. In pedagogy, there is a relationship where an adult assists a child in learning and to become more mature. In an andragogical relationship, an adult facilitates the actualisation and full development of another adult. Essentially, for Knowles, andragogy is a reaction to the perceived inadequacy of pedagogical approaches for adult learning. The pedagogical approach is based on the belief that the child needs the educator in the learning process – there is dependency in the relationship. Andragogy is based on the belief that the adult learner requires some guidance but is not dependent on the facilitator for the learning or for growth to happen (Cooper & Henschke, 2003). However, andragogy has also been criticised for its limited empirical grounding and its assumption that all adult learners are naturally self-directed, which may not apply equally across different social, cultural, and educational contexts (Merriam, 2001). While Knowles' principles remain influential in adult

education, scholars argue that adult learners' experiences are also shaped by broader social, institutional, and workplace conditions.

2.3.1 Definition of Andragogy

Andragogy is commonly defined as the "art and science of helping adults learn" (Knowles, Holton III, Swanson & Robinson, 2020: 6). It is a fundamental orientation in adult education to design adult learning experiences that encourage adult learners to grow and develop positively in their respective learning contexts. According to Merriam and Caffarella (1991), andragogy has emerged as the prevailing model in adult learning and has influenced how educators teach and design curricula.

Simpson (1964) reintroduced andragogy in Great Britain and suggested it could be the basis for a body of knowledge about adult learning. Simpson's model included four main components: (1) principles of adult education, (2) the study of adults, (3) educational psychology of adults, and (4) generalised methods of teaching adults (Henschke, 2009).

Malcolm Knowles formalised andragogy as a type of adult learning in 1968 in the form of process, not content, and it is an approach based on key assumptions concerning the nature of adult learning, such as self-directedness, life experiences, social role relevance, and the need for learning to be applied immediately (Knowles, 1975).

2.3.2 The Principles of Andragogy

Darkenwald and Merriam (1982) identify five assumptions about learners that guide pedagogy, particularly when analysed from the vantage point of traditional, teacher-directed education. These are:

The first assumption is learner dependence, which means that the learner is characterised as a dependent learner, reliant on the instructor or trainer. The instructor or trainer makes the decisions regarding what is to be learned and how it will be learned, and at what time, as well as how learning will be assessed.

The second assumption is learner experience, which assumes that the learner enters an educational setting with little or no prior experience that can be of significance during the learning process. Therefore, the instructor, as educator, is the primary source of knowledge. The third assumption is externally defined learner readiness, which assumes that a learner's readiness to learn is defined by external structures, such as moving from 5th to 6th grade, from 1st to 2nd degree, or moving into a new position in the workplace; these readiness structures are not motivated by internal sources or the learner's own interests.

The fourth assumption is subject or discipline-oriented learning; it assumes that learning is organised around discrete subjects or disciplines, with content organised and defined through the formation of a curriculum, rather than organised through problems or situations that might be relevant to learners' lives or work.

The fifth assumption is that extrinsically motivated learners; this assumes that motivation to learn is facilitated primarily by external pressures and incentives, such as expectations placed upon learners by parents, educators, and employers, as well as the fear of failure, wish for rewards, grades or certifications.

While traditional pedagogy sees learners as dependent, subject-centred and externally motivated, this orientation does not adequately represent the needs, motivations and characteristics of adult learners. Thus, in response to these limitations, Malcolm Knowles (1975) introduced an andragogy learner-centred approach specifically developed for adults and their learning needs. Knowles identified six basic assumptions for differentiating adult learners from younger learners as he moved the emphasis of learning from receiving knowledge to the responsibility of adult learners to meaningfully engage with the knowledge they seek. These assumptions are the theoretical foundations of understanding how adults learn best and the design of adult education programs. However, the applicability of Knowles' assumptions may vary within the South African context, where socio-economic inequalities, educational disparities, and workplace challenges may affect adult learners' levels of self-directedness and access to learning opportunities. Collectively, Knowles' (1975) principles suggest that adult learners' motivation, readiness to learn, self-

directedness, and prior experiences influence how barriers to learning are experienced within workplace-based learning environments.

The utilisation of Knowles' (1975) principles of adult learning is further discussed in the next sub-sections.

2.3.2.1 Self-directedness

One of the most important andragogical assumptions is that of self-directedness. According to Knowles (1975), the definition of an adult is an individual whose self-concept includes a realisation of responsibility over one's own life (personal agency). As a person matures, his or her self-concept moves from that of a dependent personality towards one of a self-directing human being. Knowles further suggested that adults are psychologically driven towards self-directedness and can resist attempts to limit their ability to be self-directed. Self-directedness is a result of maturity in the ageing process, as the individual moves along the continuum from dependency toward self-direction. Individuals are generally born with the desire to be self-directed; however, socio-economic challenges, inequalities, social norms and expectations can inhibit the development of self-directing tendencies of an individual, until adulthood. Self-directedness addresses both the adult learner's need for independence, self-fulfilment, and the need to be recognised for being responsible for his or her own decisions and choices, especially concerning learning. Self-directed adults are better at identifying their own strengths and weaknesses and thus developing their own learning processes to address them. More clearly stated, adults are clear about what they wish to learn, they take responsibility for their own learning, express concerns about the practical application of what is being learned and reject learning that they deem irrelevant to their development (Cooper & Henschke, 2003).

As a principle of andragogy, self-directed learning assumes that adult learners engage in taking control of their learning, assume ownership for their learning, can choose among different learning strategies, which they feel are best for their learning needs, and can motivate them to engage and complete a learning task. The outbreak of COVID-19 required adult learners to demonstrate self-directedness by taking responsibility for their learning during a time of physical social distancing. Adult

learners relied on distance learning and online methods of learning to complete learning and assessment activities. The idea of taking responsibility for learning rests upon the central theme of andragogy, which suggests that adults are and should be capable of managing the planning, execution, and evaluation of their own learning (Darkenwald & Merriam, 1982).

The capacity for self-directedness in learning presupposes the existence of metacognition in the learner. Greater self-awareness amongst adult learners enables individuals to consider not only what is learnt but also how learning occurs, for the learning process to become more effective. According to Duman and Semerci (2019), metacognition occurs when an individual becomes aware of their own thinking and learning processes and can control their thinking process. Metacognition is a process which encompasses planning, observation, arranging, controlling, directing, evaluating, and reflecting on an individual's own cognitive processes and, therefore, consciously perceiving how the individual thinks and learns something. The development of metacognitive skills allows an individual to consciously think and learn in a manner that serves them better in the learning process (Duman & Semerci, 2019).

A study conducted with a group of 3rd year prospective teachers at a Turkish State University looked at the effect of a metacognition-based instructional practice on the metacognitive awareness of the prospective teachers. This was to assist their learning process and that of their students by making better decisions about how an individual can improve the way in which they learn. A Metacognitive Awareness Scale (MAS) was used to collect data in the study. The study found that the metacognition-based instructional practice positively affected the metacognitive awareness of the prospective teachers. The results of the study indicated that metacognition-based instructional practice is more effective than the current teaching in improving the metacognitive awareness of the prospective teachers. The results demonstrate that metacognitive skills can be developed through training. Through active thinking and asking questions about the learning process and determining which learning strategies are required, learning can occur more effectively (Duman & Semerci, 2019).

According to Duman and Semerci (2019: 10), metacognition involves asking and answering the following questions when learning:

- *What do I know about this subject?*
- *Do I know what I need to know?*
- *Do I know where I can get some information?*
- *How much time am I going to need to acquire this knowledge?*
- *What are some tactics and strategies I can use in learning?*
- *Did I understand what I saw, heard, and read?*
- *How can I know whether I learned enough or not?*
- *How can I find out if I made a mistake?*
- *If my plan does not meet my expectations, how should I revise my plan?*

Metacognition begins with self-awareness and increases as self-realisation is cultivated as the learning process is perceived by the individual. The next step is to teach the metacognitive learning strategies, which will address the learning problem. Using strategies to better manage the learning process, together with monitoring the learning process and evaluating the learner's progress, becomes the next step in the metacognitive process. These steps allow the adult learner to experience self-efficacy and gives them responsibility over their learning, which improves the adult learner's self-confidence and academic performance (Duman & Semerci, 2019).

An article written by Loeng (2020) considers the concept of self-directed learning as well as the aspects related to the understanding of self-directed learning. Loeng (2020) states that self-direction is a tendency of how adults learn and is the fundamental difference between children and adults in a learning situation. The literature mentions that the field of adult education requires a shift from the authoritative role of the educator to the educator taking on the role of a facilitator of learning. Loeng (2020) further mentions that self-directed learning is present more in theory and less put into practice in adult education. The literature mentions that the challenge is to design appropriate educational programmes which increase adult learner activity and responsibility towards learning. This brings about active participation in the learning process and with the learning materials. Reflecting on self-directed learning provides a basis for constructive planning of an effective adult learning process Loeng, (2020).

The literature states that when self-directed learning takes place in a formal learning setting, a collaborative process between the facilitator and adult learner occurs, and decisions about learning do not occur in isolation. The adult learner does, however, take responsibility for the self-monitoring and self-management of their learning journey, through self-directedness, control of the learning situation, willingness to reflect on learning and the ability to make critical judgements about learning. Control over time, pace and place of learning are also elements which are considered in the self-directedness of the adult learner. These elements tie in with online learning, which may be offered synchronously or asynchronously. It is also possible to develop learning materials in such a way that metacognition and self-directedness are developed in individual learners through their engagement with the learning material and interactions with others in the learning programme. Loeng (2020).

A study by Curran *et al.* (2019) looked at the key factors which define self-directed learning patterns and practices of adult learners in the digital age. The study explores the perspectives of adult learners around the effect of digital and mobile technologies on their continuing professional educational activities. The purpose of the study was to obtain a better understanding of the role of these technologies in the self-directed learning habits of adult learners. Semi-structured interviews were conducted with 55 adult learners from four professional groups (nine physicians, 20 nurses, four pharmacists and 22 social workers). The categories of themes focused on in the study included perceptions of self-directed learning, self-directed learning resources, key triggers, and barriers to undertaking self-directed learning. The study revealed that digital and mobile technologies are considered important resources which support health and human service professionals. This information is important for workplace policies which support self-directed learning processes in the digital age. The study regards continuing professional development as an area of adult and continuing education that is of interest to professional groups (Curran *et al.*, 2019).

Continuing professional education is regarded as lifelong learning, where professionals acquire knowledge and skills to maintain competency in their field of practice, through formal, informal, and non-formal learning activities (Curran *et al.*, 2019). According to the study, self-directed learning takes place when the learner

takes control and responsibility for his/her own learning by deciding what and how knowledge and skills are learnt. The participants in the study regarded learning as a personal activity pursued out of professional interest, a sense of responsibility and driven by individual initiative. The reasons stated by the participants for engaging in self-directed learning were of a work-related nature, to stay abreast of updated and new technologies, to stay informed on workplace policies and industry-related regulations, as well as to solve patient and client concerns and problems that were raised. Participants who were mainly based in remote and rural communities highlighted access and connectivity to the internet as a potential technological barrier to using digital and mobile technologies to support their self-directed learning journey. Mobile phones and laptops were the most common mobile technologies used by respondents across professional groups. Where access to the internet was available, participants used mobile technologies to support their learning and to respond to questions from patients. Virtual communities of practice are also widely used by health professionals to access point-of-care information (Curran *et al*, 2019).

The literature mentions that organisational information technology policies, which are supportive of mobile technologies usage, foster a mobile and digital learning culture throughout the organisation. This allows for the continuation of professional education and training to enhance digital literacy skills amongst health and human sciences professionals. The quality of care provided to patients and clients is a further direct benefit from self-directed learning (Curran *et al*, 2019).

In a study by De Bruin and De Bruin (2011), the development and use of a rating scale that measures self-directed learning was examined. According to the literature, such an instrument is unique to the South African context. Furthermore, little research has focused on the role of self-directed learning in career and human resource development in organisations, especially in countries other than the United States of America. The value of this study is that, as the world of work changes rapidly, people learn throughout adulthood, in settings other than in formal education institutions. This gives great importance to the applicability of self-directed learning in the workplace. Self-directed learners adapt better to changes in their environment, they realise their

potential as leaders and remain resilient in the face of career or educational challenges (De Bruin & De Bruin, 2011).

The progress of research into self-directed learning in the workplace is partly attributed to the use of availability of a high-quality instrument which measures learner self-directedness. The researchers involved in this study generated 22 items of learner self-directedness in the workplace. Each of the items reflected activities that indicate self-directed behaviour. Respondents were required to indicate their agreement or disagreement with the items on a 5-point Likert-type scale. The main issue with this scale, developed by De Bruin and De Bruin (2011), is that it is a one-factor scale that focuses only on one aspect of learner self-directedness, while the concept is multi-faceted and complex. Also, it was used on a mostly homogeneous group of younger students at a residential university, which makes the results difficult to generalise (De Bruin & De Bruin, 2011).

There were 519 participants in this study, comprising workers from various organisational settings. The study focused on the internal psychometric properties of the self-directed learning readiness scale (SDLRS). The results of the study indicated that participants reported high levels of self-directedness and found that the majority of the items were relatively easy to agree with. "Active learning" was the first primary factor and was the most difficult to agree on. The item required the participants to indicate that they take active steps and go out of their way to pursue learning opportunities. The second primary factor, "learning is fun", was the easiest to agree with and required participants to indicate that they enjoy learning and developing new skills. This item did not require participants to take responsibility for their learning and show an interest in their self-development, but rather to mainly enjoy learning new things about their job. The third factor of "motivated to learn" covered items that were of medium difficulty to learn. The study suggests that learner self-directedness is an internal disposition that motivates people to take responsibility for their own learning (De Bruin & De Bruin, 2011).

The benefits of completing and receiving the interpretation of the results of the scores allow adult learners to gain a deeper understanding of their behaviour and what is hampering their learning progress, and where they can improve in this regard. Once

adult learners become aware of their behaviours, they can develop strategies to become more self-directed in their learning journey. Organisations will be better placed to support their employees in their self-directed learning efforts (De Bruin & De Bruin, 2011).

2.3.2.2 Experience

An adult accumulates a growing wealth of experience that becomes not only a broad resource for learning but also a source of individual identity. Life experiences that begin to accumulate at birth and continue throughout infancy and childhood can be perceived simply as occurrences, and not opportunities for learning or shaping identity. In adulthood, however, experiences take on a different quality which is conducive to learning, as they become more traditionally associated with adult social roles, expectations, and social identity (Knowles, 1984). More specifically, the social, occupational, psychosocial, and family contexts in life situations in which experiences occur create and promote learning opportunities for adults by orienting current and prior experiences to life, developmental tasks, and expectations. In turn, these life events and transitions also promote learning through the interpretation and transformation of experience gained into knowledge.

Personal beliefs and values, as well as socio-cultural expectations or norms, shape the frameworks through which we evaluate events by filtering them for meaningfulness. Meanings accompany experiences when we know what is happening and what importance the event includes for our own personalities. Berger (2001: 508) reiterated Lindeman's theory when she stated, "experiences give rise to cognitive disequilibria and reflection, which can result in a new view of oneself and meaning of one's life". Experiences and the meanings we associate with them do play an important role in the cognitive, intellectual, aesthetic, and affective development of adults, especially about expertise, personality formation, social roles, empirical research and learning psychologists (Cooper & Henschke, 2003).

The principle of andragogy assumes that an adult's previous experience in the learning environment, along with his/her life experiences, can shape the learning outcome (Darkenwald & Merriam, 1982). Adulthood can be defined as "an accumulation of life

experiences, which creates a reservoir for learning that cannot be denied” (Darkenwald & Merriam, 1982: 86). The accumulation of an adult learner’s life experiences differentiates them from child learners. It’s therefore adult experience that augments what is presented in the classroom. These experiences act as unique and individualistic learning tools. A perspective which should also be noted is that negative learning experiences have the potential to hinder current learning based on a certain expectation of what learning should look and feel like. Research indicates that learning experiences act as filters to learning; experience can accumulate over time and influence the rate at which learning takes place; it can contribute to resistance to learning; experience can affect how information is retained and stored; and it can influence learners’ attitudes in the learning environment. Adult students draw upon their life experiences during the learning process, and these experiences become an integral component of learning. Therefore, it is the job of the adult education professional to effectively draw upon these experiences to enable students to actively participate in the educational process (Darkenwald & Merriam, 1982).

A study conducted by Socheat, Bhaumik, Tamjis and Raju (2018) explored the influence and impact of the practice of adult learning through coaching, as described by executive leaders from the rice industry, who were participants in the study. Adult learning through coaching was meant to improve the knowledge and skills of the participants in the study. The literature considered coaching as a learning and development process for personal development under the umbrella of adult learning. Even though the executive leaders had existing competencies from their knowledge and experience as managers, the coaching training was intended to enhance their knowledge and skills and enable them to direct the market leaders to a desired level of success (Socheat, Bhaumik, Tamjis & Raju, 2018).

Face-to-face interviews were conducted with five executive leaders who worked at a large multinational company in Cambodia. The results of the study expressed the perspectives held by the participants from the executive coaching programme. The participants had personal conversations with the coach, on-site observations were conducted in different aspects of the jobs held by the participants. The coaching intervention was concluded when the coach provided a professional evaluation with recommendations to each participant. The results of the study indicated that

participants experienced reduced stress levels after they implemented methods to deal with situations that arose in the workplace. The coaching intervention provided the executive managers with an opportunity to reflect on their management style together with the coach. Where changes in the management style of the executive managers had to occur, this was suggested by the coach, for the participants to become better leaders in their areas of work (Socheat *et al.*, 2018).

The coaching interventions integrated the existing knowledge and experiences of the participants with the new experiences gained. This allowed the participants to further build their confidence, capability, and awareness of themselves as leaders in the rice market industry. The literature highlights that experience is a stepping stone to gaining more knowledge, as new experiences are had through the adult learning process (Socheat *et al.*, 2018).

2.3.2.3 Readiness to Learn

Adults experience a readiness to learn when their current experience or knowledge base does not adequately prepare them for enhancing some aspects of their lives or in response to a developmental task of his or her social role. As individuals mature, lifestyle changes and choices must be made in response to social roles and responsibilities, such as spouses, parents, employees, etc. Life cycle events such as births, deaths, job loss, marriage, and divorce, and developmental tasks that occur during different stages of growth, trigger a readiness to learn in adults. Sinnott (1994) referred to readiness to learn as teachable moments that influence the outcome of the developmental task. Successful achievement of the task leads to happiness and enhanced self-efficacy, whereas failure leads to unhappiness, societal disapproval, and diminished self-efficacy. For adults to effectively cope with real-life situations in terms of life cycle outcomes and developmental tasks, their readiness to learn is linked to their feeling of needing to know and for what reason (Cooper & Henschke, 2003).

Readiness to learn presupposes that an adult becomes ready to engage in a learning activity “when their life situation creates a need to know.” Darkenwald and Merriam (1982) found readiness is influenced by the need to “perform the roles and tasks inherent in adulthood” (Darkenwald & Merriam, 1982: 99). The researchers also stated

that readiness is influenced by freedom of choice, in that “adults are not only volunteers in the learning process, but the subjects or skills they learn are primarily chosen by them. This freedom of choice demonstrated by adult learners is characteristic of andragogy” (Darkenwald & Merriam, 1982: 123).

A study (Vilkonis, Bakanovienė & Turskienė, 2013) looked at the readiness of adults to participate in learning, using a distance mode of learning including e-learning (virtual learning environments, m-learning (mobile learning technology) and t-learning (television learning technology). Openness of learning was used as a basis for distance learning, which is free from limitations of time and space, and which is based on information and communication technologies (ICT). With open distance learning (ODL), the learner becomes more individualised, while the educator becomes an advisor. The purpose of the study was to analyse the readiness of adults to learn using e learning, m learning and t learning on the grounds of self-assessment, of adult learners’ computer literacy, usage of e-services, experience, of attitude towards the mode of learning (Vilkonis *et al.*, 2013).

For this study, 248 adults in the Northern Lithuania region completed a questionnaire. Some of the participants were engaged in adult learning, and some were not. Some of the participants were employed, and others were unemployed. The findings of the study revealed that the majority of the participants experienced a good self-assessment of computer literacy when using ICT at work and at home. This was especially prompted by experience gained in the field of distance learning and the utilisation of other electronic services. The study further revealed that the ability of learners to use ICT was a key determining factor in the adult learners’ decision to choose the mode of delivery. These participants were ready to engage in the process of lifelong learning, using distance e-learning, m-learning, and t-learning technologies. Participants who assessed their computer literacy as poor chose theoretical lectures in auditoria and blended lectures as their preferred mode of learning. Perceived ability to be able to cope with the learning environment is potentially a barrier to learning (Vilkonis *et al.*, 2013).

The results of the study showed that many of the participants gained experience in distance learning, at institutions of higher learning, in the aspect of application of e

learning technologies and are more willing to choose the modes of distance learning. The study mentions that the penetration of e learning in the education system will impact the attitudes of adult learners, in terms of utilising distance learning, to further their lifelong learning experience. (Vilkonis *et al.*, 2013). The study shows that adults are more receptive to a learning experience when they feel ready and equipped to participate in the experience of learning and can grapple with what will be required of them as adult learners.

2.3.2.4 Need to Know

Knowles (1975) recognised the need for adults to know why it is important to learn information before they begin learning it, and especially how it will apply to their everyday situations and lives. Also, adults are not as easily persuaded that they should learn something new if they do not recognise the need for them to do so. The need to know is most often associated with life changes, developmental tasks, and stage transitions. The pressure emanating from the tasks at hand promotes a sense of responsibility in adults for what and why they learn, and it is in this type of environment which the best adult learning occurs. When adults are internally driven to learn something, they will expend a considerable amount of energy in determining the benefits or consequences of learning or not learning the information. As the decision and choice about what is necessary to learn is ultimately a personal one, the need to know can be viewed as a type of intrinsic motivation that propels adults to follow through. As individuals mature, there is a tendency to acquire and apply knowledge immediately as opposed to more in the futuristic sense (Cooper & Henschke, 2003). For example, adult learners participating in workplace-based learning programmes may be more motivated to engage in learning when they clearly understand how the acquired knowledge and skills will contribute to career progression, workplace performance, or professional development (Cooper & Henschke, 2003).

The principle of andragogy, “Need to know”, has been examined on three levels or dimensions, according to Darkenwald and Merriam (1982). The first level/dimension encompasses the adult’s need to know how learning will be conducted, followed by the need to know what learning will occur, and finally, the need to know why learning is important at all.

Based on this principle of adult learning, educators should provide adult learners with information about the learning content before the learning intervention. Information about the delivery method prepares learners for better participation and helps manage the expectations of adult learners. Furthermore, fulfilling the need to understand the purpose of the learning experience can lead to more effective mutual planning, increased motivation to learn, and more positive post-training outcomes (Darkenwald & Merriam, 1982). Recent studies similarly suggest that adult learners are often motivated by career advancement, employability, personal fulfilment, and workplace development opportunities (Merriam & Bierema, 2014).

2.3.2.5 Motivation

The need to develop and contribute is a major motivating factor for adults returning to education around the age of thirty, and academic achievement is equated with public recognition or validation of the generative capacity. However, adult learner motivation may differ across individuals and contexts depending on socio-economic circumstances, workplace demands, educational background, and personal goals (Merriam & Bierema, 2014). Some adult learners may approach learning for the sake of learning; others may approach it as a means of enhancing their quality of life. As individuals reach the age of forty, the need for learning shifts as their motivation for vocational purposes decreases and that for personal growth and development increases (Cooper & Henschke, 2003).

Motivation to learn, the fifth principle of adult learning, is determined by the degree to which adult learning results in a solution to a problem which has personal value to the learners (Knowles *et al.*, 1998). Darkenwald and Merriam (1982) noted the influence of several demographic variables on motivation to learn, including marital status, gender, age, occupation, income, and race. The researchers' findings indicated that adults engage in learning to meet a requirement (job, task, or life skill). However, there is no one absolute motivational factor, as adult learners have diverse needs and purposes for returning to a learning environment (Darkenwald & Merriam, 1982).

Ryan and Deci (2020) investigated intrinsic and extrinsic motivation, drawing on contemporary research. According to the theory, intrinsic motivation is an important concept that reflects individuals' inclination to learn and adapt to life. Extrinsic motivation is associated with external control or regulation. Both motives to basic human needs for autonomy and competence were examined in the literature. According to the study, motivation means that an individual is moved to do something. A person who feels no inspiration or impetus to act is characterised as unmotivated, whereas a person who is energised or activated towards an outcome is regarded as motivated. The literature highlights that an individual not only varies in the amount of motivation they possess, but also in the orientation of that motivation. An individual's attitudes and goals give rise to the orientation of motivation (Ryan & Deci, 2020).

The literature notes that, within self-determination theory (SDT), a distinction can be made between intrinsic and extrinsic motivation. Intrinsic motivation refers to doing something because it is inherently interesting, enjoyable, and satisfying. Intrinsic motivation appears to be exercised for the positive experiences it brings about by extending one's capacities. This natural, experienced motivational tendency is a critical element in cognitive, social, and physical development. One grows in knowledge and skills when they act on their inherent interests (Ryan and Deci, 2020).

Extrinsic motivation is when an individual does something to attain a separable outcome. Extrinsic motivation ranges from unwillingness to passive compliance and to active personal commitment. The literature states that extrinsic motivation requires individuals to value and self-regulate activities to enable them to transform their behaviour and that it emanates from their sense of self. The internalisation of extrinsic motivation, which leads to self-determination, is associated with greater persistence, more positive self-perceptions, and higher-quality engagement. Intrinsic and extrinsic motivation are supported in conditions where individuals feel supported in their feelings of competence, experience connectedness, and are exposed to new ideas and skills. The consideration of motivation allows individuals to understand others and own their attitude and behaviour patterns better, so that they can make changes needed to bring about the results they and others are aiming for throughout the learning journey (Ryan and Deci, 2020).

Concerning learning, extrinsic or external forces, such as pay raises and promotions, are generally not the primary motivators for mature adults. Mature adults are motivated to learn for a variety of reasons, most of which are intrinsic or internally driven: enhanced self-esteem, recognition, better quality of life, improved self-confidence, personal fulfilment, and achieved self-actualisation. When adults experience a need to enhance or change their life situation, their motivation to learn propels them toward a task-, life-, or problem-centred orientation toward growth-oriented learning. Motivation varies according to the situation. Some adults are intrinsically motivated, while others are extrinsically motivated (Cooper & Henschke, 2003).

2.3.2.6 Orientation to Learning

Orientation to learning, or problem solving, is the sixth andragogical principle. This principle assumes that more effective learning can occur when the adult learner can transfer new knowledge to a real-life problem or situation. The principle of adult learning suggests that adult learners generally prefer a problem-solving approach to learning, rather than a subject-centred approach (Darkenwald and Merriam, 1982).

With maturity, one's learning orientation transitions from subject-centred to problem-centred, which is relevant to current life situations. Pedagogical subject-matter orientation provides information to be used at a later date. Andragogical problem-centred orientation, however, focuses on the immediate need for adults to apply learning to life and task-centred problems. Faced with problems arising from developmental tasks, life cycle events, or life stage transitions, adults seek learning to acquire the skills or knowledge needed for application and to develop coping skills. Growth and maturity can be attributed to experience and motivation acquired through solving problems in busy work, home, school, and community life situations. Learners do not only want to achieve a good academic record but also want to learn for understanding, and the newly acquired knowledge can result in the learner changing their beliefs about something which they once held (Cooper & Henschke, 2003).

These differing perspectives demonstrate that adult learning theories continue to evolve across educational, technological, and workplace contexts.

2.4 APPLYING THE PRINCIPLES OF ANDRAGOGY IN LEARNING DESIGN

According to Knowles, there are eight design components which support the learning design process and make the learning environment more conducive to learning. These elements take place before, during, and after the learning intervention. These are made up of the following components: (a) Preparing the learners for the program; (b) setting a climate that is conducive to learning (physically comfortable and inviting; and psychologically mutually respectful, collaborative, mutually trustful, supportive, open and authentic, pleasurable and human); (c) involving learners in mutual planning; (d) involving learners in diagnosing their learning needs; (e) involving learners in forming their learning objectives; (f) involving learners in designing learning plans; (g) helping learners carry out their learning plans; and, (g) involving learners in evaluating their learning outcomes. Active involvement in the learning process from both the educator and the adult learner is necessary at each step of the andragogical learning process (Henschke, 2009).

In a literature review conducted by du Toit-Brits (2018), an in-depth description of self-directed learning was closely examined. This was aimed at enhancing the understanding of self-directed learning (SDL) in adult education (du Toit-Brits, 2018). SDL allows training instructors to select, design, assess and implement their learning model within their learning space and context. Self-directed learning requires individuals to possess and demonstrate willingness, self-direction, aptitude, accountability, attitudes and self-awareness of their thoughts and behaviour. Self-directed learning requires learners to identify their own learning needs and formulate new learning goals, taking responsibility for their learning progress. SDL enables learners to discover their full potential (du Toit-Brits, 2018). In practising the process of self-directed learning, a learner engages with a body of knowledge and then reflects on their experiences to determine the relevance of that knowledge. When this integration of knowledge and experience occurs, the learner experiences some degree of transformation within themselves (du Toit-Brits, 2018).

SDL occurs as learners interact with one another, which brings their personal characteristics into interaction with the learning environment. The Transformative and Holistic Continuing Self-Directed Learning theory (THCSDL) model can be considered

as a proposed means to stimulate the growth and development of a self-directed learner (du Toit-Brits, 2018).

The THCSDL model proposes that learners' learning characteristics, such as SDL ability, learner motivation, performance goals, and self-awareness of own learning needs and the learning environment, which is integrated with a learning change process, can holistically and positively change learners into becoming transformed self-directed learners who value lifelong learning, as they pursue their goals and experience personal growth (du Toit-Brits, 2018).

Learners who actively participate in learning are likely to become motivated to set high-performance goals, which develops a positive learning attitude. According to du Toit-Brits (2018), motivation provides learners with the desire and commitment to learn meaningfully, and they believe they will acquire the required knowledge and skills. The process of setting high-performance goals leads learners to gain greater self-awareness of their individual learning needs, enabling them to direct and take responsibility for their learning. It is therefore suggested that learners with a higher-performance goal orientation may be more inclined to apply SDL skills ("self-monitoring, help-seeking, curiosity, self-management and taking responsibility for their learning"), which may subsequently result in transformed lifelong SDL. The THCSDL model suggests that learners' performance and their goal orientation can either be negatively or positively associated, with the extent to which SDL is applied in the learning journey.

In a study conducted by Carpenter-Aeby and Aeby (2013), instructional strategies, learning activities and the learning environment, which incorporated Malcolm Knowles' principles of adult learning, were used to improve the learners' ability to acquire and retain knowledge in their graduate-level assessment and psychopathology training course, in social work. The learning climate and activities were evaluated by learners to determine what impact these elements had on the training course. The study mentions that the inclusion of the principles of andragogy served the purpose of helping adult learners gain new knowledge using a learning approach that was relevant to them (Carpenter-Aeby & Aeby, 2013).

The study highlights the connection between Knowles' principles of adult learning and learner characteristics among adult learners, including factors such as self-concept, experience, and readiness to learn, which impact the adult learning process. As part of the study, the learners' learning styles were assessed, and learning strategies and activities were designed that aligned with the experience of the adult learners. This approach to learning for adult learners was due to Knowles' belief that learning is acquired, interpreted, integrated, and transformed based on the experiences of the adult learner (Carpenter-Aeby & Aeby, 2013).

This study was conducted with 24 part-time adult learners enrolled in the master social worker training programme at an American university in the Southeast. The learners completed a survey to evaluate the training programme that they were enrolled on. The survey covered two main areas: the learning environment and learning strategies. The andragogical design elements were used as questions to base the questions on, which learners were required to rate their responses to. These questions were broken down into sub-sections covering climate, planning, needs diagnosis, objective formulation, design, activities, and evaluation of the learning process (Carpenter-Aeby & Aeby, 2013).

The results of the study revealed that the use of Knowles' principles of adult learning in the learning process allowed for learners and the educator to have a mutual partnership, which supported the achievement of the learner's learning objectives. The study revealed that learners' self-directedness increased when the diagnosed learning styles and strategies were implemented. The learners' experiences were used as rich learning resources throughout the learning process and during the completion of activities. The problem-centred orientation to learning allowed learners to integrate their learning into their lives by applying the theory to the practical knowledge they had learnt. The study found that the physical climate of the learning environment influenced how well learners and the educator interacted.

The planning of the training programme's structure, which included consultation with learners about learning activities, allowed learning strategies to be put in place to ensure that all sections of the learning material were covered within their respective timeframes. The study found that learners became more self-directed when their

learning needs were diagnosed. The learners' self-directedness enabled them to manage their learning activities and assessments to achieve their learning objectives. The educator better understood how to support learners when they knew the learners' experiences and needs for participating in the social worker training programme. The findings further revealed that adopting a problem-centred orientation to learning allowed learners to integrate theory into practice and immediately apply knowledge to solve problems. The study's results show how Knowles' principles of adult learning can enhance the learning process for adults. It further demonstrates the need to diagnose an adult learner's needs so that learning strategies can be designed to bring meaning to the adult learner's learning experience (Carpenter-Aeby & Aeby, 2013).

Mbozi (2016) examined the proposed framework for the University of Zambia for designing and managing university adult education programmes intended to become sustainable systems. The framework was based on two arguments. The first argument was that the successful determination of any adult education programme is based on its responsiveness to the needs of the programme's various participants. The second argument concerns providing appropriate responses to challenges that arise in adult education programmes. Solutions which are non-progressive to the adult education field and which make it irrelevant to society, should be avoided. The basic components of the framework include "diversity in staffing; responsive programmes, structured succession programmes; a structure for encouraging institutional memory; a structure for promoting communication and sharing of diverse ideas and innovations; and a strong monitoring and evaluation system" (Mbozi, 2016: 29).

Mbozi (2016) looked at the knowledge gained from designing and managing a successful university adult education programme. Adult education programmes respond to changes within society and contribute to positive social change. Various factors also affect the design of the learning programme (Mbozi, 2016).

Curriculum designers have a perception of adult education which influences the design process. One perception is that it is a vehicle for promoting public policy that serves a national interest in bringing about social order, stability, and national development. The second perception is that adult education is a catalyst for personal development

and growth. Curriculum designers aim to design learning materials that meet learners' needs and enable them to reach their full potential as adult learners (Mbozi, 2016). Thirdly, adult education is seen as an intervention to bring about group or community development and to facilitate change; therefore, how specialised groups learn is an important consideration for curriculum designers (Mbozi, 2016).

The issues raised in the design and management of adult education revolve around creating a sustainable system. The vision and mission of creating a sustainable system should be shared by all members of the community, who understand how their roles contribute to achieving the vision. The programme should also be responsive to environmental changes, to ensure sustainability. A succession programme that trains and develops staff's capacities allows new ideas to be incorporated into the design and management of the learning programme. A sustainable system also requires a monitoring and evaluation system that reviews the learning programme using data from tracer studies, industry studies and social context studies. Both internal and external evaluations strengthen the learning programme by complementing each other. A mechanism that encourages institutional memory should be put in place. Documenting ideas, practices and plans that benefited the design and management of the learning programme should be encouraged as it allows for critical reflection. A structure that allows ideas, challenges, and shared practices to be communicated will facilitate the sharing of knowledge and experiences to create a sustainable system for developing and maintaining learning programmes. The success of adult education lies in the need for the learning programme and how soon after acquiring the knowledge and skills can it be used by the adult learner (Mbozi, 2016).

Morris (2019) made a consideration in terms of whether modes of *learning* (the purpose of instruction, the nature of learners' performance, and inquiry) can be used in the design of adult education to promote self-directed learning amongst adult learners. This approach is intended to empower adult learners to adapt to changes in their social context. Modes of learning comprise instruction, where knowledge and skills are delivered to learners, inquiry, where new ideas or strategies are created and thirdly, performance, which was later renamed as reinforcement, where an idea is internalised through regular practice by a learner, to affect the way a learner thinks and completes their work. Adult learners will be able to adapt their behaviour as

change becomes increasingly rapid and complex in their environment. Teacher-directed processes used to deliver learning are no longer effective for preparing adult learners to embrace lifelong learning, as they do not provide them with the perspective to adapt their performance to changes in their environment (Morris, 2019). This is particularly relevant within workplace-based learning environments, where ETDP practitioners are often required to continuously adapt their knowledge and skills to changing workplace demands and learning contexts.

SDL enables adult learners to improve their current knowledge and skills, preventing competencies from becoming obsolete due to economic changes. The upskilling of skills and knowledge further protects individuals from long-term unemployment and steers them closer towards self-actualisation. The consideration of two models of modes of learning, which could be used to guide the design of adult education, was firstly the reinforcing model of modes of learning, which promotes a teacher-directed learning process and secondly, an adapting model of modes of learning, which serves to assist educators to design adult education, which encourages learners to demonstrate adaptive behaviours in their performance. Regarding the reinforcing model of modes of learning, the reinforcement of habitual patterns of perceiving, thinking, judging, feeling, and acting. With this model of learning, performance may be inflexible, poorly adapted to changes in social contexts, and lacking in motivation for self-directed learning. The adapting model of modes of learning encourages adult learners to adapt their performance to social contextual changes and to engage in learning as a self-directed learner (Morris, 2019).

Reinforcing the mode of learning is appropriate in certain circumstances where, after formal instruction, repetitive practice accompanied by feedback on the correctness of learners' performance is more fitting. This is especially in situations which pose a potential danger to learners. On the other hand, when learners apply knowledge and skills without questioning the environmental context and adapting to changes within it, the value of the knowledge and skills learned is diminished. This provides a sense that adult learning does not occur in a social or contextual vacuum (Morris, 2019). An inquiry-based learning approach, when accompanied by critical thinking, facilitates successful learning outcomes through self-directed learning. It also assists educators in designing adult education that encourages learners to become adaptable in their

performance and to understand that knowledge is not fixed across contexts or over time (Morris, 2019).

Mukhalalati and Taylor (2019) argue that adult learning theories play a role in the design and implementation of education programmes, particularly in healthcare professional programmes. Healthcare professional education programmes use a variety of learning theories, possibly because of a lack of understanding of the range of relevant theories available to their learning context.

Learning theories support educational practices, because they serve as a basis for how knowledge, skills and attitudes are learnt, how performance takes place as well as how changes in behaviour occur. An understanding of different learning theories assists educators in choosing the most appropriate instructional strategies, learning objectives and assessment methods, based on the context of the learning environment. The integration of learning theories and subject matter should improve the quality of the learning programme (Mukhalalati and Taylor, 2019). Healthcare professional educators can use educational theories to justify their choice of learning and assessment activities. This provides a solid theoretical foundation that is contextualised to their learning environment (Mukhalalati & Taylor, 2019). Similarly, Merriam and Bierema (2014) argue that adult learning theories provide an important foundation for understanding how adults learn within different social and workplace contexts. Adult learning theories further assist educators in designing learning experiences that promote critical thinking, participation, and practical application of knowledge within adult education environments.

Mukhalalati and Taylor (2019) found that present-day learning theories are divided into the following categories: instrumental, humanistic, transformative, social, motivational, reflective, and constructivist. Instrumental learning theories include behavioural theories, cognitivism, and experiential learning. Behavioural theories focus on stimuli in the environment controlled by the educator. The stimulus can result in either a positive or negative change in an individual's behaviour. The behaviour change could therefore either strengthen or diminish the learning experience. Cognitivism is a theory that focuses on the learner's internal environment and cognitive structures. Cognitive learning theories are associated with mental and psychological processes that result in learning. Processes of insight, information processing, perception, reflection,

metacognition, and memory contribute to giving meaning to the knowledge that has been accumulated. Experiential learning is the process by which knowledge and learning are created through interaction with the natural environment, allowing for experience to be gained (Mukhalalati & Taylor, 2019).

Humanistic or facilitative learning theories emphasise the learner's human freedom and dignity, enabling them to reach their full potential. Humanistic theory allows self-directed learning, where adult learners plan, manage, and assess their learning. In doing so, an adult learner can achieve a state of self-actualisation and a sense of fulfilment (Mukhalalati & Taylor, 2019). Transformative learning theories (reflective learning) focus on empowering learners to consider the validity of their “frames of reference.” Learning occurs when new knowledge is integrated with existing knowledge. Learners may maintain their original “frame of reference”; however, they may view some perspectives differently than before. Transformative learning involves three stages. The first stage is experiencing a confusing problem and reflecting on previous perspectives about the event. The second is considering the experience while engaging in critical evaluation and self-reflection. The third stage is acting on the issue, based on self-reflection and previous assumptions, which leads to transforming the meaning of the event (Mukhalalati & Taylor, 2019).

To strengthen the understanding of a task, social theories of learning are used. This involves integrating the concepts of behaviour modelling and cognitive learning. The driver of learning is found within social interaction, the person, the context, and the desired behaviour (Mukhalalati & Taylor, 2019). Motivational model implies that adult learning is associated with the fundamental elements of motivation and reflection. Self-determination theory is an example of a motivational theory that focuses on intrinsic motivation. The chain of response model focuses on three internal motivating factors: self-evaluation, the learner's attitude towards education, and the importance of setting goals (Mukhalalati & Taylor, 2019).

The healthcare professional educators can use adult learning theories, together with their healthcare knowledge, to improve the design of curricula, learning delivery strategies and assessment approaches. The exchange of expertise between themselves and more experienced healthcare professionals can support their role as

educators through consistent practice, resulting in value-added learning (Mukhalalati & Taylor, 2019).

2.5 SUPPORTERS OF KNOWLES' PRINCIPLES OF ADULT LEARNING

Theorists such as Brockett (1983), Knowles (1975), and Brookfield (1986) expressed their beliefs about adult learning to help hard-to-reach adults become more self-directed in their learning, thereby improving their lives.

In 1983, Brockett affirmed that the principles of andragogy have been applied successfully across a range of settings, including business, government, colleges and universities, continuing professional education, religious education, adult basic education, and even elementary/secondary settings. Brockett (1983) also indicated that an andragogical approach can be used proactively to develop written learning materials.

In 1990, Carroll supported Knowles's (1975) approach to adult learning, which holds that adults need to know why they need to learn something and what its importance is, and that adult learners learn best when the topic is of value to them. In the same year, Heimstra and Sisco (1990) contributed to Knowles' theory by providing annotations of 97 works on andragogy. The study found that when a committed and skilled facilitator applies an andragogical approach to training adult learners, the adult learners experience a positive impact. Heimstra and Sisco (1990) also suggested that andragogy was a means to solve the limitations of a pedagogical model. This is because adult learners are independent and responsible for their own actions; they learn out of a desire to solve immediate problems in their lives and exhibit self-directed behaviours. The pedagogical approach does not promote developmental changes in adults and therefore displays elements of tension, resentment, and resistance to the learning process (Henschke, 2009).

In 1986, Brookfield exemplified what Knowles (1975) stated: in andragogy, learning is a transactional encounter in which a learner's desires and an educator's priorities inevitably interact and influence each other. Ross (1987) used the concept of andragogy to promote the levels of teacher effectiveness. Ross (1987) believed that a teacher's behaviour relates to student achievement in terms of clarity, variability,

enthusiasm, task-oriented behaviour, the use of student ideas, the types of questions asked, probing, and the level of difficulty of instruction (Henschke, 2009).

In 1991, Knowles (1975) was credited by Griffith as being the best-known American adult educator. He was regarded as making numerous contributions to the literature of the adult education field, with an orientation towards making adult education attractive to teachers of adults in diverse settings, thereby increasing the effectiveness of these teachers. Furthermore, the common-sense approach used by Knowles, through his primarily descriptive rather than analytical writing, had wide appeal. Knowles's presentation of andragogy as a fresh way of thinking about adult education has attracted many practising adult educators to the subject. Griffith believed that Knowles' concept of andragogy has inspired countless practising adult educators to adopt the term, to embark upon graduate study in the field, and to profess allegiance to their perception of it. Knowles has also sparked considerable interest in the self-directed learner and in the use of learning contracts between the adult learner and the facilitator (Henschke, 2009).

In 1991, Savicevic referred to andragogy as a discipline that examines the education and learning of adults in all their forms of expression. Savicevic also suggested that philosophers such as Socrates, Plato, Aristotle, the Sophists, and Ancient Rome, who are considered the epochs of humanism and the Renaissance, all reflect thoughts and views about the need for learning throughout life, and about the moral and aesthetic impact of learning throughout one's different phases of life (Henschke, 2009).

Jin, Kim, and Baumgartner (2019) reflected on how older adult learners engage in informal learning using mobile devices. The contributing role played by mobile devices in the informal learning process was examined in a study conducted. Four theoretical frameworks were used: technology acceptance theory, experiential learning theory, social cognitive theory, and activity theory. Themes of older adults' informal learning using mobile devices were also identified. This included self-learning of health or medical knowledge, affective and emotional dimensions, ambivalent attitudes, practical uses, interpersonal and intergenerational communication, and collaborative learning experience (Jin *et al.*, 1998). Collectively, these frameworks emphasise that adult learning is shaped by technological, social, experiential, and contextual factors.

This is relevant to the current study, as ETDP learners in workplace-based learning environments may experience barriers related to technology access, workplace interaction, self-directed learning, and the practical application of knowledge. According to Coombs (1985), informal learning is any voluntary, unplanned, and unstructured learning that occurs in various settings outside the traditional classroom environment, throughout daily life. More recent conceptualisations describe informal learning as a continuous and experience-driven process that occurs through workplace interaction, digital engagement, collaboration, and everyday practice (OECD, 2021; Dillard, 2024). The older adult learner's intention and consciousness of their learning experience are significant. Some types of informal learning include self-directed learning, which takes place intentionally and consciously, incidental learning, which occurs unintentionally but consciously and tacit learning, which occurs unintentionally and unconsciously. Mobile devices are used for informal learning because of their ease of access in daily life (Jin *et al.*, 1998).

Older adult learners learn more effectively in an environment that allows self-paced instruction on mobile devices. The use of mobile devices allows adult learners to determine when and where learning occurs. It provides adult learners with access to learning, the ability to interact, conduct research and perform various learning tasks depending on the capability of the mobile device (Jin, *et al.*, 1998).

Four main theoretical frameworks are considered for understanding the learning of older adults in informal settings. In terms of the technology acceptance theory, the main constructs are the perceived ease of use of mobile devices and the belief that using the technology will improve the individual's quality of life and provide them with self-satisfaction (Jin *et al.*, 1998).

Experiential learning is used to build knowledge by converting an experience into learning. An individual's emotions are featured within the learning process, as they form the basis of learning. Social cognitive theory is used when considering the role played by environmental factors (such as support from family and friends), personal factors (such as individuals' confidence in the use of technology and their desire to learn) and behavioural factors such as the actual use of mobile devices in the social

interaction and connection between these factors and the use of mobile devices, (Jin *et al.*, 1998).

The four theoretical frameworks highlight that the learning experiences of older adult learners are not confined solely to their cognitive abilities but also to other factors. The experience of the older adult learner also interacts with other personal, behavioural, and social conditions, which affect how older adult learning takes place and provides an understanding of how older adult learners optimally with mobile devices (Jin *et al.*, 1998).

The findings of the study revealed that older adult learners require emotional and technological support to help them cope with their anxiety when interacting with mobile devices. Educators should also consider using content that does not mentally overload older adult learners. Spending more time explaining the basic concepts of mobile devices helps older adult learners feel supported. The study further revealed that the predominant reason older adult learners decide to participate in mobile learning is to gain health-related knowledge. One of their main learning goals was to learn how to read smartphone applications and blogs to assist with diagnosis or to discover the prevention and treatment of their condition or disorder. This is one of the main benefits of using mobile devices for older adult learners (Jin *et al.*, 1998). This study aligns with Knowles' (1975) principle of adult learning, which holds that adults are ready to learn when the learning can solve a problem in their immediate environment. In this study, the older adult learners were motivated to learn about health care using mobile devices because the knowledge gained would assist them in their daily lives.

2.6 CRITIQUE OF KNOWLES' (1975) PRINCIPLES OF ADULT LEARNING

In 1984, Hartree believed that Knowles' (1975) principles of adult learning did not meet the expectations of a comprehensive learning theory for adult education. Hartree claimed that Knowles's (1975) principles of adult learning lack a coherent discussion of the different dimensions of learning and an explanation of what each dimension entails. In the same year, Jarvis wrote that even though Knowles' (1975) principles of adult learning gained the status of an established doctrine in adult education, there was insufficient empirical research to justify its dominant position in the field of adult

education. Jarvis mentioned that even though andragogy was best understood in curriculum terms as an expression of a romantic philosophy, it was losing its appeal as an educational theory (Henschke, 2009).

In 1988, Burge questioned whether an andragogical learner-centred approach to distance learning would undermine academic thoroughness. Burge believed that a closer examination of the key implications of Knowles' principles of adult learning and of a learner-centred view within a distance-learning setting would contribute to academic reliability. Burge mentioned that the quality of how learning is delivered should be given more attention and be much more learner-centred, as this differs from contact learning. Burge questioned how well Knowles' principles of adult learning could be applied in a distance learning context (Henschke, 2009).

Research conducted by Clardy (2005) used Malcolm Knowles' assumptions of adult learning as a theoretical framework to develop a hypothesis. Clardy (2005) was of the view that Malcolm Knowles' (1975) principles of adult learning do not include the full range of adult learning experiences, as it makes mention of misleading distinctions between adult and child learners, it disregards individual differences between adults as learners and do not adequately deal with the relationship between motivation and learning. Clardy (2005) notes that continued learning and education are common practices among most adults, and therefore, the prospects for increased adult education are very strong. This is due to rapid economic and technological change (Clardy, 2005).

The researcher mentions that it should not be assumed that adult learning processes are always the same for all adult learners. The needs and preferences of adult learners must be determined. An example of this is about adults who experience certain disabilities. Based on their disability, they may experience a more dependent learning status than other adult learners with no disabilities. The researcher points out that Malcolm Knowles' (1975) principles of adult learning should not be applied uniformly but should be incorporated into educational planning to identify the special needs of adult learners (Clardy, 2005).

The study mentions that Knowles' assumption, which is that adult learners are more encouraged to learn when they are informed of the reason why they need to learn something and when the learning acquired can be practically applied to their work and personal lives, does not apply to all circumstances involving the education of adult learners. The literature argues that adult learners may need to understand the reasons for learning; however, they may be comfortable being led by the educator, trusting the educator to direct them through the learning content and experience without necessarily being explained the rationale for those experiences. Another point of view is that some adult learners may appreciate knowledge that is intrinsically valuable to them, but not instrumental. Adult learners may want to learn something out of gaining pure joy, satisfying their curiosity, or because it meets an interest of theirs, as opposed to Malcolm Knowles' (1975) view that adults engage in a certain type of learning solely because it is relevant and pragmatic to their lives (Clardy, 2005).

The literature also mentions another point: adults may have a range of well-developed life experiences that allow them to relate to the educational setting they are in. This practice, however, might only be possible for some adult learners, since adults have diverse backgrounds shaped by the experiences they have had. The researcher's argument, presented in the body of the information, is that the unique characteristics of adults as learners should form the basis for deciding whether to participate in learning (Clardy, 2005).

A further criticism made by Clardy (2005) is that not all adult learners share the same learning needs, motivation and learning orientations. This means that not all learners in a learning setting will experience the same learning reaction and outcomes. Furthermore, this means learners have distinct capabilities, desires, and reasons for learning. The study provides a perspective suggesting that, even though adult learners may prefer a learning position that offers autonomy and self-directedness, they may favour a learning situation that incorporates elements of a pedagogical learning style. The reasons for this could include that some adult learners have become aware that they do not possess enough knowledge to direct their own learning, and/or that being taught pedagogically is a more practical option given limited time and the effort required (Clardy, 2005).

A further argument is that autonomous, self-directed learning should not be universally applied to all adult learners, as not everyone is qualified or capable of making learning decisions about what and how they want to learn, and not all adult learners are objective enough to make a final judgment about the value of learning. This argument relates to adult learners who are beginners, know very little about the learning subject, are unprepared, and are therefore unable to participate in deciding the structure of the learning intervention, the resources needed for the learning programme, and the learning tasks that should be completed (Clardy, 2005).

2.7 ADULT LEARNING IN SOUTH AFRICA

It must be noted that there is limited research reported on adult learning in South Africa. A study conducted by Hamman (2019) examined learning, focusing on a mindfulness-based stress reduction (MBSR) programme for adults in Cape Town, South Africa. The study noted that in Western culture, a cognitive approach to learning dominates, while the roles of the body and mind in the learning process have been marginalised (Hamman, 2019).

The data collected through semi-structured interviews showed that when there is awareness of the body and emotions in the learning process, mindfulness occurs. This type of embodied learning motivated adult learners to take appropriate actions to support their transformation. The aim of the study is to integrate emotions into the learning process through mindfulness with cognitive knowledge. This is because some emotions, such as trauma and fear, can pose as a barrier to effective adult learning (Hamman, 2019).

A transformative learning process, on which this study is based, uses the experiences of an adult learner to create a new perspective and give meaning to learning, influenced by their emotions. A person's emotional predisposition predisposes the adult learner to the meaning they derive from the learning process. The literature states that the experiences of an adult learner serve as the foundation for cognitive learning, with reflection as the primary focus. This, in turn, results in the adult learner undergoing a transformation by engaging with new ideas and perspectives, which bring meaning to the learning process. The meaning that adult learners derive from

the learning experience shapes their beliefs, behaviour, and experiences, as well as what is learnt. The literature states that if meaning cannot be associated with the learning, it is either rejected or becomes a new learning experience (Hamman, 2019). The literature mentions that through embodied learning, which is an awareness of the mind, including how the body and emotions react to the learning, the learning process becomes holistic. The literature further adds that when emotions and the body are ignored during the learning process, it creates a sense of injustice in the field of adult education, as it denies adults the opportunity to use their emotions and to feel their bodies when receiving the learning content (Hamman, 2019).

The study included 30 participants from Cape Town and surrounding areas. These participants were enrolled on the MBSR programme. The participants who were interviewed for the study were selected based on completing the pre-course and post-course questionnaires and attending six of the eight weekly sessions (Hamman, 2019).

The study found that 15 participants were not attentive to their bodies before attending the training, and 8 participants only became aware of their bodies while completing the training course. The study notes that learning through the body means paying attention to the body and being aware of any strains that occur during the learning process. The literature notes that awareness of the body during learning triggers reflection and new actions arising from the learning process. When a learner becomes aware of how the body feels during the learning process and whether pain is experienced, they can adjust their body to alleviate the pain. By listening to the body's needs and taking the necessary action to alleviate pain rather than ignoring it, the learner takes better care of their body, which will make them feel healthier. The findings of the study indicate that the mindfulness-based stress reduction (MBSR) programme helped the learners to link their bodily perceptions to their emotions. This assisted the adult learner in learning more about themselves through reflection and in addressing related cognitive matters. The study revealed that an awareness of how the body reacts to learning uncovers what the mind is experiencing. This holistic approach to learning supports the efficacy of the transformational adult learning process (Hamman, 2019).

This study allows educators to consider the learner characteristics of adult learners and develop the most appropriate instructional design methods and learning materials for them. The study shows how Knowles' principles of adult learning pertaining to past positive or negative learning experiences, lack of motivation to learning and a lack of readiness to learn can manifest in the body when pain is experienced by the body. Positive emotions from learners can signal a satisfying learning experience, which allows learners to feel more self-directed and empowered to resolve problems in their lives, which creates a positive learning experience, thereby encouraging learners to be ready to engage in further learning opportunities. The study shows that adult learning can be approached holistically. The effects of learning on the adult learner's emotions and body, together with Knowles' (1975) principles of adult learning, can be used to determine how well learners feel they are coping with learning as they aim to complete the training programme.

2.8 LEARNER CHARACTERISTICS AND ANDRAGOGY

The concept of learner characteristics is used in the sciences of learning to categorise groups of learners and determine what and how they learn best, based on their personal cognitive and demographic characteristics. It is important for instructional designers to understand the learner characteristics of the target population to design and develop learning materials and delivery methodologies that align with those learners, since learner characteristics do impact the learning process. Taking learners' characteristics into account when planning and delivering a learning intervention improves its effectiveness (Drachsler & Kirschner, 2014).

Learner characteristics are diverse and include aspects of learners' personal, academic, social/emotional, and/or cognitive nature. Personal characteristics pertain to demographic information about the learner, such as age, gender, maturation, language, socioeconomic status, cultural background, and special needs related to disabilities. Academic characteristics are more education- and/or learning-related, such as prior learning and educational level. The social or emotional characteristics of a learner are another example of a learner characteristic and refer to the dynamics of the group or the individual member within the group.

Examples of this characteristic include the composition of the group, the individual's position within the group, sociability, self-image, and self-efficacy within the group. Cognitive characteristics related to the learner include elements such as concentration span, memory abilities, mental processing of information, and intellectual abilities, which determine how the learner perceives, remembers, organises, and analyses information to solve problems (Drachsler & Kirschner, 2014).

Different learners exhibit distinct learner characteristics, which impact their learning journey and therefore require diverse guidance and support from the educator (Drachsler & Kirschner, 2014). A study by Celestin and Yunfei (2018) examined the challenges associated with workplace training transfer. The study considered that employees have certain self-attributes, motivation, and expectations before participating in the training. 213 High school and vocational teachers in Thailand participated in this study. The findings of the study revealed that a teacher's personal characteristics at the pre-training stage, such as learning readiness, personal transfer efficacy, motivation to transfer, personal capacity and perceived content validity, are instrumental in predicting the transfer effort performance expectancy at the post-training stage. The purpose of the study was to assist training practitioners and managers to improve learner characteristics before training takes place to increase the transfer of training at the workplace (Celestin & Yunfei, 2018).

The study focused on answers to three questions designed to predict trainees' expectations for the transfer of training to the workplace. The questions were (1) "Can I do this task? (2) Do I want to do this task? and (3) Why?" (Celestin & Yunfei, 2018).

The findings showed that if teachers believed they could improve their performance when they wanted to, they could transfer the training to the workplace. The study, therefore, revealed that a positive relationship exists between personal self-efficacy and the level of expected performance outcomes. The data revealed that the learner characteristics of teachers in Thailand, in terms of learner readiness, motivation to transfer, personal capacity to transfer and performance self-efficacy, are indeed significant predictors of the transfer effort performance expectancy of the on-cloud computing tools training programme. This finding suggests that it is beneficial for training practitioners and managers to develop and enhance learners' characteristics

before the commencement of a training programme, as these characteristics can influence the transfer effort at the workplace (Celestin & Yunfei, 2018).

Online or blended learning can reach, attract, and educate a diverse number of adult learners and provides them with an opportunity to take responsibility for their learning. Adult learners can experience independence and self-directedness and, when required, request assistance, as some have no or limited experience with computers and technology. As part of ensuring educational success, learner characteristics become a factor to be considered in the learning process, as learner characteristics have a consequence associated with it (Vanslambrouck, Lombaerts, Pynoo, and Tondeur 2017).

A study was conducted to examine whether learner characteristics can be used to predict certain indicators of the learning process's outcome, including levels of learner satisfaction, intent to persist, and performance in learning conducted using an online or blended learning approach. The study considered the learner characteristics of motivation, self-regulation, attitude, and self-efficacy as the predominant factors which influence the success of the learning journey. These learner characteristics were selected based on previous research that examined their influence on a learner's satisfaction, intent to persist, and performance in an online learning environment. The study further considered demographic variables such as age, gender, current level of education, employment status and having children. The survey was conducted with 242 adult learners who participated in online or blended learning (Vanslambrouck *et al.*, 2017).

The learner characteristics of self-regulation of the learners under the subscale of "time management" did not increase the performance levels of learners positively. Self-regulation, as measured by the sub-scale "environment structuring," has a positive relationship with satisfaction (Vanslambrouck *et al.*, 2017). The learners' attitude was found to contribute to their satisfaction. The learner characteristic of self-efficacy was found to predict learners' performance and satisfaction. Motivation was found to be a significant learner characteristic in online or blended learning. Individual learner characteristics are strong indicators of the level of risk a learner faces. Awareness of the effects of learner characteristics on the learning process contributes

to the literature on adult learning principles. These factors directly influence learner attrition and throughput rates; hence, educators benefit from paying close attention to the learner characteristics that affect learners (Vanslambrouck *et al.*, 2017).

2.9 CONCLUSION

The reviewed literature on adult learning and Knowles' (1975) principles of adult learning demonstrates that these principles remain relevant for modern-day teaching and learning among adult learners, from a theoretical perspective. The reviewed literature shows that adult learning is a complex process, as adult learners come from different backgrounds and have different needs and expectations. The above literature further showed how Knowles' principles of adult learning can be used to diagnose the attitudes and needs of adult learners before completing a learning programme, to determine changed behaviours, and to serve as a measure of the learning process. Furthermore, the lack of sources based on South African studies indicates a need for research such as the proposed study to expand existing knowledge on how the application of adult learning principles in learning programme design can help reduce the barriers to learning experienced by South African adult learners. This aligns directly with the study's research problem and objectives, which aim to investigate the barriers experienced by ETDP learners in workplace-based learning contexts in South Africa. This study will provide empirical evidence on how Knowles' principles of adult learning can be used to analyse the barriers to adult learning in a South African context, thereby contributing to their use in modern-day learning and development practices.

The next chapter presents a review of the literature on the barriers to adult learning.

CHAPTER 3: BARRIERS TO ADULT LEARNING

3.1 INTRODUCTION

When institutions of higher learning implement any type of “learner support interventions” for enrolled learners, they will not be able to successfully offer the appropriate support required by adult learners if they do not identify the barriers to adult learning that need to be addressed. The intention to improve academic engagement with learners and the aim of reducing high dropout rates amongst adult learners should be reasons for institutions of higher learning to focus on identifying and mitigating the effects of barriers to adult learning. The problem with the post-school education and training system is that not all adult learners enrolled in learning interventions complete the programme they are enrolled in. When adult learners experience barriers to learning, this negatively affects their employability and government spending on post-secondary education. (Banks & Dohy, 2019).

When educators lack awareness or knowledge of adult learners' prior learning experiences and the barriers that may exist in the learning milieu, they may not know where to look for reasons for attrition to address the situation. This may mean that the factors which hinder a learner's progress will not be addressed because of a lack of awareness of the barriers to retaining adult learners within the learning system. In terms of ensuring transfer of learning to the work environment, this is essentially a two-sided problem: on the one hand, attrition occurs, on the other, there is a lack of transfer which may limit the capacity of the learners who do complete the training or learning programme in their ability to apply what they have learnt successfully once in the workplace. (Banks & Dohy, 2019).

Barriers to learning are not the same for adults as they are for children, as adults and children differ in maturity and thus possess distinct characteristics (Dillard, 2024). To ensure the relevance and appropriateness of a learning programme for adult learners, it should be learner-centred. Identifying the barriers experienced by adult learners is one way to ensure that learning programme design and delivery remain learner-centred. This can be achieved by ensuring that the learning content addresses the

needs of adult learners and that the delivery methods are appropriate to their individual circumstances and learning contexts (Lee, 2017).

Gaining a perspective on the barriers to learning faced by adult learners paves the way for understanding the factors that impede adult learners from benefiting from learning opportunities. By identifying barriers to adult learning in the context of Knowles' (1975) principles, efforts can be made to promote retention among adult learners enrolled in learning programmes. This research aims to make information on barriers to adult learning available, to inform the development of adult learning programmes that facilitate the workplace learning journey of adult learners in the South African post-secondary education context. The value of determining the barriers to adult learning lies in becoming aware of the factors that impact learners' participation in learning and, therefore, the quality of their learning experiences.

Knowles' (1975) principles of adult learning will be used in this study to determine the barriers to adult learning in an existing workplace learning programme and to develop suggestions for improving the programme's design and delivery (Lee, 2017). The understanding of the barriers to adult learning, using Knowles' (1975) principles of adult learning, can greatly assist educators to use this information to fully obtain the commitment needed from adult learners, so that they may become committed and active participants of learning, with the goal of creating a culture of lifelong learning within their environments. Thus, adult learners can optimise their potential as lifelong learners. Successful learning experiences can yield a high return on investment for employers and learning institutions that enrol adult learners. This means that successfully trained employees will become competent to perform in an area of work through changes in their behaviours and attitudes, which will manifest in improved productivity, profitability, and job satisfaction. Adult learning in South Africa is partially funded through a tax, the skills development levy, which provides resources for adult learners to participate in work-related learning (Baumgartner, 2024; Boateng, 2022).

3.2 THE FOURTH INDUSTRIAL REVOLUTION, COVID-19, AND THE CHANGING NATURE OF WORK IN SOUTH AFRICA

The fourth industrial revolution and the COVID-19 pandemic have dramatically changed the way jobs are performed. Automation of work led to some jobs becoming obsolete and being replaced by others. Continuously improving skills and knowledge is necessary to stay up to date with changes (Pedron, 2018).

Remote work, which became the norm during the COVID-19 pandemic for many businesses, has changed the way employees interact, deliver work, and have productivity measured. In addition, the pandemic has changed the way employers provide learning opportunities, with a notable shift towards online learning, which raises issues of learner engagement and transfer of learning even further. Several studies examined the impact of COVID-19 and how the abrupt changes of the global health crisis affected the way employees worked. The response to curb and manage the spread of the virus led to employees around the globe working from home, where they were not considered “essential” or “life-sustaining” workers. The researchers found that COVID-19 accelerated the trend toward working from home, or working remotely, meaning employees could work from anywhere. This was a direct effect of COVID-19 (Kniffin *et al.*, 2021).

In cases where employees had to undergo training while practising physical distancing, training was delivered through distance learning, specifically via electronic (e-learning) or virtual platforms. There is a likelihood that COVID-19 will accelerate the pace of change in working and training outside conventional settings, as employers recognise the cost savings from these practices. Working and receiving training from home can make it difficult for employees to find the physical space to work and train, especially if they live with other people or in surroundings where a designated office space is impossible. When the two domains of work and personal life are not separated, working from home can create a burden for employees. As people work and live in a globally interdependent community, infectious diseases like COVID-19 and other global threats require employers and employees to find a diversity of smarter, safer ways to work together (Kniffin *et al.*, 2021).

The digital revolution may create an economic situation in which machines perform jobs, leaving a large part of the global population unemployed. In industries where new jobs are created, the remaining workforce will need to be upskilled with the requisite knowledge, skills, and attitudes to adapt to new technologies and less labour-intensive jobs (Pedron, 2018). The fourth industrial revolution is meant to make sectors of the economy, such as manufacturing, agriculture, and the service industry, more efficient and effective. Jobs performed by humans are intended to become easier and more time-efficient. This will also benefit the workforce by improving their quality of life, giving them the opportunity to perform creative and more complex work. It is important to note that during this period of change in the world of work, adult learners will find themselves learning new information as emerging economies will establish new career opportunities for the workforce (Pedron, 2018).

According to Statistics South Africa (2021), total employment decreased by 86,000 or (-0,9%) quarter-on-quarter, from 9 652 000 in March 2021 to 9 566 000 in June 2021. Decreases in the following industries were experienced: community services (65 000 or -2,3%), manufacturing (-15 000 or -1,4%), construction (-7 000 or -1,4%), electricity (-1 000 or -1,7%) and business services (-1 000 or -0,0%). The trade industry reported no quarterly change. An increase in employment was noted in the following industries: mining (2,000 or 0,4%) and transport (1,000 or 0,2%). Total employment increased by 60,000 or (0,6%) year-on-year between June 2020 and June 2021.

Statistics South Africa (2021) reported that full-time employment decreased by 27,000 or (-0,3%) quarter-on-quarter, from 8,602,000 in March 2021 to 8,575,000 in June 2021. This decrease was experienced in the following industries: business services (-17 000 or -0,9%), manufacturing (-16 000 or -1,5%), construction (-11 000 or -2,6%), trade (-5 000 or -0,3%), electricity (-1 000 or -1,8%) and transport (-1 000 or -0,2%). However, there were increases in the following industries: community services (22,000 or 1,0%) and mining (2,000 or 0,4%). Full-time employment decreased by 17,000 or (-0,2%) year-on-year between June 2020 and June 2021.

Statistics South Africa (2021) further reported that part-time employment decreased by 59,000 or (-5,6%) quarter-on-quarter, from 1,050,000 in March 2021 to 991,000 in June 2021. This was attributed to decreases in the community services industry (-87

000 or -17,6%). The electricity industry reported no quarterly change. However, there were increases in the following industries: business services (16,000 or 7,8%), trade (5,000 or 2,5%), construction (4,000 or 6,7%), transport (2,000 or 11,1%) and manufacturing (1,000 or 1,4%). Part-time employment increased by 77,000 or 8,4% year-on-year between June 2020 and June 2021.

Statistics South Africa (2021) reported that gross earnings paid to employees decreased by R0,1 billion, or (-0,0%), from R715,2 billion in March 2021 to R715,1 billion in June 2021. Decreases were noted in the following industries: business services and mining. An increase was reported in the following industries: transport, trade, construction, manufacturing, community services, and electricity. year-on-year, gross earnings increased by R70,4 billion or (10,9%) between June 2020 and June 2021.

Statistics South Africa noted that basic salary/wages paid to employees increased by R7,3 billion or (1,1%) from R646,7 billion in March 2021 to R653,9 billion in June 2021. An increase in the following industries created this result: business services, trade, manufacturing, transport, construction, and electricity. However, decreases in the mining and community services industries were experienced. Year-on-year, basic salary/wages increased by R55,2 billion or (9,2%) between June 2020 and June 2021.

Data collected by Statistics South Africa indicated that bonuses and overtime paid to employees decreased by R7,4 billion or (-10,8%) from R68,5 billion in March 2021 to R61,2 billion in June 2021. This was mainly because of decreases in the following industries: business services, manufacturing, and trade. However, increases were recorded in the following industries: transport, community services, electricity, and construction. Year-on-year, bonus and overtime payments increased by R15,1 billion or (32,9%) between June 2020 and June 2021.

Average monthly earnings increased by 1,7% quarter-on-quarter, from R23 127 in February 2021 to R23 526 in May 2021. Year-on-year, average monthly earnings increased by 9,7%, (Statistics South Africa, 2021).

According to Statistics South Africa, COVID-19 created a sudden drop in economic activity during the second quarter of 2020, when lockdown restrictions were at their most severe. In the first quarter of 2020, real GDP was R1 147 billion, which fell to R947 billion in the following quarter as the country sought to protect itself against the pandemic.

The economy has seen consistent growth since that shock, but not enough to return to pre-COVID-19 levels. Real GDP was R1 131 billion in the second quarter of 2021, 1,4% down from the first-quarter 2020 reading. Statistics South Africa also reported that the South African economy recorded its fourth consecutive quarter of growth, expanding by 1,2% in the second quarter of 2021 (April–June). This followed a revised 1,0% rise in real gross domestic product (GDP) in the first quarter (January–March). Despite the gains made over the last four quarters, the economy is 1,4% smaller than it was before the COVID-19 pandemic. In terms of industries, the transport & communication, personal services, and trade industries were the most significant drivers of growth in the second quarter of 2021, with transport & communication and agriculture recording the highest growth rates.

(Statistics South Africa, 2021).

The surge in economic activity in the second quarter of 2021, related to land transport and communications this underpinned the 6,9% rise in transport, storage & communication. Personal services, which comprise health-related activities, increased by 2,5% in the second quarter. This was on the back of increased economic activity driven by the second phase of the national COVID-19 vaccination programme, which kicked off on 17 May 2021. Another contributor to growth in personal services was medical schemes, which recorded a rise in membership numbers. Trade increased by 2,2%, driven by a rise in economic activity across all trade sectors in the economy. The rise in trade activity in the second quarter was reflected on the demand (expenditure) side of the economy. Household final consumption expenditure increased by 0,5%, driven mostly by a rise in household spending on transport, food & non-alcoholic beverages, and health (Statistics South Africa, 2021).

There are two scenarios which emerge from changes within the labour market. When jobs are lost in some sectors of the economy and gained in others, employers will need

to source skilled people to fill the new jobs. The skills might be available, or human resource development interventions will need to be planned to address the skills gap (Pedron, 2018). On the other hand, when jobs are lost, people with the skills for those jobs will need to be retrained to acquire new skills for the new jobs. Identifying and addressing potential barriers to adult learning encourages adult learners to participate in developing their skills. A skilled workforce can no longer be treated as a private responsibility, as various consequences arise from a lack of, or a shortage of, suitably skilled employees. The importance of addressing barriers to adult learning in the workplace is becoming increasingly imperative as the population of adult learners increases. Research on adult education provides employers with both an opportunity and an obligation to enhance the effectiveness of adult learning interventions (Pedron, 2018).

In the study by Manda and Dhaou (2019), the 4th industrial revolution in South Africa has brought both opportunities and challenges. The fourth industrial revolution is characterised by the use and implementation of intelligent manufacturing processes, including the construction of cyber-physical systems and the operation of smart industries that utilise cutting-edge technologies and techniques. As the fourth industrial revolution in South Africa is driven by cloud computing, smart products, smart mobility, and smart logistics, it is important to note that the digital technical dimension has brought changes to broader society (Manda & Dhaou, 2019).

South Africa faces numerous social and economic challenges, where most of the population still experiences poverty based on historical inequalities and current high unemployment rates. The digital era we live in should be used to transform lives for the benefit of society. Digital inclusion and access are critical in allowing all citizens in South Africa to benefit from the opportunities of the fourth industrial revolution. The fourth industrial revolution will require a skilled labour force which is adaptable to change, technologically savvy, and innovative. There might be fear that technology will replace the work which humans perform, through automation and robotisation. Some jobs might no longer exist, leading to further job losses and the widening of the skills gap (Manda & Dhaou, 2019).

Government policies and strategies that have been developed are important for responding to the opportunities and challenges of digitally connected and smart environments. For South Africa not to be left behind in this age of technology, investment in further research and development is required. Through policy development and legislation on trade restrictions, enterprise data security, personal data privacy, training and education, and ICT, South Africa can put further measures and resources in place to enable technological transformation. The fourth industrial revolution is causing the nature of jobs to change, and therefore individuals will need to have E-Readiness and will need to acquire E- E-E-skills and E- E-E-literacy, as they navigate their way through an E-Society, which will allow citizens to participate effectively in social and economic activities (Manda & Dhaou, 2019).

According to the indicators used in the Global Competitiveness Index, South Africa ranked 61st globally in embracing the 4th industrial revolution. The South African government has established national institutional mechanisms for advancing innovation, research, and development through the Council for Scientific and Industrial Research (CSIR) and technology innovation agencies. South Africa's national E strategy aims to focus ICT initiatives to transition South Africa's economy to the digital industrial revolution. South Africa is currently working towards the development of digital platforms relevant to the majority of South Africans, the development of technologies to improve productivity and efficiency in local industries, and the use of technology to create new industries and markets (Manda & Dhaou, 2019).

South Africa's expenditure on research and development remains low compared to other middle-income countries, and it spends only 0.73% of its gross domestic product (GDP) on research and development. Furthermore, despite the significant spending on infrastructure, the quality of information and communication infrastructure remains poor. The high cost of broadband in South Africa has also hindered efforts to advance the Fourth Industrial Revolution. The literature further notes that a lack of collaboration among various parties will disrupt the implementation of plans and strategies geared towards the success of the fourth industrial revolution. The current social, political, and economic environment has created mistrust within the country. Self-interest behaviour and corruption have eroded cohesion between government, business, and civil society (Manda & Dhaou, 2019).

Educational institutions, government agencies, and the business sector will need to forge partnerships and collaborate as all the different role players transition towards the future needs of the economy. The continued employability of individuals will largely depend on their level of education as individuals enter new occupational categories. Emphasis will be placed on the readiness of adult learners to reskill and upskill their competencies to become requalified in professions that are becoming more digitalised and less labour-intensive (Pedron, 2018).

An article published by the Mail & Guardian (2020) stated that 35% of South Africa's workforce is at risk of unemployment due to automation. This number will also increase due to businesses closing and the impact of COVID-19. South Africa's gross domestic product (GDP) is expected to decline by 16% because of COVID-19. The article emphasised that COVID-19 has demonstrated the importance of implementing digital processes in the labour market and the education system for continuity, especially when physical contact is limited. Social distancing has accelerated the digital transformation, further creating a demand for digital upskilling (Mail & Guardian 2020:1-3).

In April 2020, the South African government implemented a set of tax relief measures, which were covered in the Draft Tax Relief Admin Bill and in the 2020 Draft Disaster Management Tax Relief Bill. A four-month payment holiday for companies' skills development levy contributions began on 1 May 2020. This development resulted in some SETAs having to postpone planned learning interventions due to a lack of financial resources, as they did not receive the same number of levies they previously received. The article further mentioned that the Department of Higher Education and Training must consider reviewing the current National Skills Development Plan to make it shorter and more flexible. This will then allow a greater focus on skills development initiatives, which will translate into more relevant and effective programmes related to the country's current socio-economic landscape. The article mentions that online learning could be a more cost-effective alternative to building a learning institution. The COVID-19 pandemic has affected the learning and development environment to such an extent that some individuals will not be able to return to their training interventions, even with the implementation of online courses,

due to the country's existing digital divide. The article states that an online learning methodology works in certain situations; however, more appropriate ways of teaching and learning will need to be explored to benefit all learners in the education and training system. As job roles change, more on-the-job training will be needed. As a response to the effects of social distancing, online apprenticeships and recruitment were conducted to ensure the continuity of teaching and learning. Collaboration, dialogue, trust, engagement, and inclusiveness in the teaching and learning process are essential to ensure that online learning is a success. The article states that a hybrid learning system, which integrates face-to-face classes with online learning, is emerging alongside new markets, new skill needs, and a different approach to learning. COVID-19 Impact on education, skills development, and training (Mail & Guardian, 2020:1-3).

As part of the move towards automation, drones will be used in the mining industry, as jobs in the sector become digital to improve efficiency and reduce safety risks. The article stated that Sector Education and Training Authorities (SETAs) should consider solutions to encourage digital upskilling and close the digital divide experienced by many individuals across sectors of the economy.

3.2.1 The Need for Identifying the Barriers to Adult Learning in Post-Secondary Learning Programmes

The barriers to adult learning, if left unaddressed, may result in adult learners feeling disengaged and demoralised, leading them to drop out of the programmes for which they are enrolled or fail to apply what they have learnt in the work context. Using Knowles' (1975) principles of adult learning to investigate the barriers to adult learning aims to identify adult learners' needs and to promote academic and personal growth. Barriers to adult learning should be investigated because they can result in adult learners never being made aware of their potential to achieve success through learning, or in not realising the value of lifelong learning and making use of continued learning opportunities provided in the workplace. (Banks & Dohy, 2019). Learning experiences and perceptions of barriers to learning are embedded in emotions, values, and perceptions that the adult learner holds about himself/herself and his/her lifelong learning path.

Research by Banks and Dohy (2019) indicates that learners enrolled in higher education programmes may take longer to complete their programmes due to socio-economic and financial barriers, as well as the inability of learning programmes to engage adult learners fruitfully. The barriers to adult learning could be addressed by gathering the necessary research data to ascertain specifically how the application of adult learning principles can be used to eliminate or reduce some of the barriers adult learners experience when they participate in the learning opportunities offered in the workplace or other work-related learning opportunities provided via the skills development infrastructure in South Africa. Barriers to learning disrupt the learning process and negatively affect the rate at which adult learners graduate from institutions of higher learning. This suggests that barriers to adult learning are not only individual in nature, but are also shaped by broader institutional, socio-economic, and workplace factors that influence adult learner participation, progression, and completion rates.

Banks and Dohy (2019) refer to an example where a consortium was formed comprising eleven public higher education institutions under the University Innovation Alliance (UIA) (i.e., Arizona State University and Georgia State University) to eliminate barriers experienced by adult learners by exchanging best practices for learner retention and finding ways to increase the graduation rates of college students. This association resulted in a 24.7% increase in graduation rates and a 9.2% increase in undergraduate degree completions. Initiatives implemented by these universities included placing a certain number of learners into cohorts to minimise feelings of overwhelm when navigating campus life and providing stipends to learners who require financial assistance but do not qualify for a scholarship. This example illustrates why research into the barriers to adult learning is important for institutions of higher learning seeking to improve the academic performance of adult learners. Similar research in South Africa is vital so that best-practice guidelines specific to South African adult learners' work, life, and learning contexts can be implemented to address the attrition rate of post-secondary learning opportunities within the higher education and skills development frameworks. (Banks & Dohy, 2019).

3.3 DESCRIPTION OF BARRIERS TO ADULT LEARNING

Barriers to adult learning are diverse, as adult learners have different needs and require different forms of support to complete their chosen programmes of study. When adult learners encounter a barrier to learning, an unmet learning need arises. A greater awareness of the current trends which impede the learning process assists in informing and updating the adult learning policy in workplaces and institutions, since the scale and shape of problems change over time (The Social Research and Demonstration Corporation, 2020)

Barriers to adult learning can be categorised into situational, institutional, attitudinal, and academic. Situational barriers are related to learners' current life circumstances. Situational barriers come about when there are multiple conflicting responsibilities for home, family, children, and work. Experiencing financial problems, a lack of suitable childcare, a scarcity of time to study, job commitments, transportation problems, poor mental or physical health, and limited energy are further situational barriers that adult learners experience (The Social Research and Demonstration Corporation, 2020).

Institutional or structural barriers are related to the policies and practices of workplaces and educational institutions that provide learning opportunities. Barriers to learning include inadequate financial support, the high cost of tuition, the high cost of study materials, and a lack of flexible course options, which make it difficult for adult learners to balance their multiple family and work responsibilities (The Social Research and Demonstration Corporation, 2020).

Dispositional or attitudinal barriers are related to the attitudes and values held by the learner. Attitudinal barriers include low self-esteem, nervousness about the ability to succeed, lack of personal or career development goals, a feeling of isolation in the learning environment, and previous negative learning experiences (The Social Research and Demonstration Corporation, 2020).

Academic barriers are related to the essential or cognitive skills required to access and succeed in education. Literacy, numeracy, writing skills, reading skills, skills in accessing information, and computer skills. critical and reflective thinking skills. The

different barriers to adult learning are interconnected, so adult learners can experience multiple barriers throughout their learning journey as their lives change. A greater understanding of the barriers to adult learning allows all role players to support adult learners most effectively and appropriately (The Social Research and Demonstration Corporation, 2020).

In a study by Flynn, Brown, Johnson and Rodger (2011), potential adult learners who had not participated in adult education, due to their illiteracy, were interviewed. Five themes related to barriers to learning were identified, namely: family values and responsibilities (i.e., cultural); the emotional effect of family poverty on participants' lives (i.e., anger at the welfare system); disrupted school and learning experiences (i.e., multiple school changes); social exclusion and personal challenges (i.e., marginalization due to race, class); and turning points in participants' education and hopes for the future (i.e., positive role models) (Flynn *et al.*, 2011).

Flynn *et al.* (2011: 1) described literacy as "*the ability to understand and use printed information in daily activities at home, at work, and in the community to achieve one's goals and to develop one's knowledge and potential.*" For individuals who are unable to read and write, performing daily tasks may become an overwhelming challenge, even though they might adapt by using oral communication to exchange information. People with poor literacy skills might feel isolated in a society that uses a person's education level, career attainment, and earning power to determine a person's value. (Flynn *et al.*, 2011).

Flynn *et al.* (2011) also examined the barriers which prevented marginalised adults from participating in learning (Flynn *et al.*, 2011). The learner's experience and likelihood of educational success are influenced by many factors, including culture, poverty, community, social class, government policy, income, gender, and race. In this study, barriers were grouped into three main categories: situational, institutional, and dispositional. The influence of individual characteristics such as age, gender, and privilege was also examined (Flynn *et al.*, 2011).

Situational barriers relate to a person's life situation and comprise poverty, violence, living situation, and familial support. Individuals with low incomes are less likely to buy books, subscribe to newspapers, or have jobs that require high levels of literacy. Living situations affected by poverty can also limit or prevent an individual's access to supportive technology, such as a computer or internet access, or leave an individual with limited physical places to study that are not conducive to learning. Compared with higher-income adults, individuals with low income are, because of the factors mentioned above, limited in the extent of their learning opportunities (Flynn *et al.*, 2011).

One of the most significant barriers to adult education for women is the burden of childcare. Subsequently, women experiencing poverty and female immigrants are drawn to participate in literacy programmes that offer childcare facilities. Single mothers have more trouble attending and completing adult education classes than mothers who receive support from their partners. Regarding women, a further barrier to learning may be emotional or physical abuse which they encounter from an intimate partner. This results in female adult learners viewing the adult learning environment as being dangerous, as attending classes might make them vulnerable to violence from an intimate partner. The level of emotional support an adult learner receives can determine whether the individual participates in literacy programs. When an adult learner's family, friends, or partner expresses negative attitudes toward education, it may lead to lower participation and completion rates (Flynn *et al.*, 2011).

The literature notes that situational barriers experienced by adult learners are intensified by institutional barriers. Institutional barriers related to learning programs, the educator's training delivery style, and the guidance and support offered by the educational institution may be experienced by adult learners. For example, poor curriculum design, which may result in content that is irrelevant to the learner's life or needs or that is uninteresting, discourages some adult learners from completing the learning programme (Flynn *et al.*, 2011). Adult learners who have a different first language from the language of instruction may experience marginalisation in the learning environment by feeling excluded, invisible, or even of inferior status to other learners who can better understand the language in which the training is being

delivered and therefore possibly also the content of the learning programme (Flynn *et al.*, 2011).

Dispositional or motivational factors among adult learners constitute the third category of barriers to education identified in the literature. This category includes the influence of past experiences, perceptions held by one's community, and personal, academic, and job-related motives. Sources of motivation used by adult learners are intended to result in individuals striving to obtain financially rewarding and satisfying jobs, improving their parenting skills, using educational achievements to improve their self-esteem, to meet the expectations of others, such as their employer and community. Adult learners will each follow a different learning path based on their unique earlier educational experiences and their family's influence on their education. Adult learners with a challenging educational background, including previously poor academic performance, might not fully participate in or engage with adult learning opportunities due to negative experiences with them (Flynn *et al.*, 2011).

Individual characteristics such as gender, education level, and socioeconomic status plays a role in the rates of participation of literacy programs Gender plays a role in individual barriers to learning because there seems to be fewer learning programmes available in workplaces where mostly women are employed, as opposed to workplaces where mostly men are employed, even though men exhibit higher drop-out rates from educational programmes than women, (Flynn *et al.*, 2011).

In addition, the effect of privilege, such as the advantages of birth in relation to relative wealth, freedom from violence, and membership in the dominant culture, is an important consideration when understanding individual barriers to learning. Barriers exist that prevent individuals from pursuing education; however, the community surrounding them does not encourage it. Such potential learners risk feeling isolated, as their support structures diminish their efforts and determination to improve their educational prospects (Flynn *et al.*, 2011).

In Flynn *et al.* (2011), family values and responsibilities, the emotional effect of family poverty on participants' lives, disrupted school and learning experiences, social exclusion, and personal challenges, as well as educational turning points and hopes

for the future, send certain messages about the importance of education. Some considered education unnecessary preparation for future employment, and it was a low priority when work had to be done at home. Domestic violence and the basic need for safety became a legitimate priority over education at various points in participants' lives. Some parents did not enforce school attendance and behaviour codes. Situations arose in which children had to leave school at their family's request or, on their own, felt the need to begin working to support their families financially. The study found that frequent moves from one place of residence to another and the need to financially assist at home and with practical tasks reinforced the relatively low importance of formal schooling in the present and future contexts.

The need to attend school was not reinforced by parents or partners who could not or would not assist participants. In such a situation, participants felt that if they continued to attend school, they would do so without their family's support (Flynn *et al.*, 2011). Similar findings were reported by Merriam and Bierema (2021), who noted that socio-economic challenges, limited family support, and emotional stress may negatively affect adult learner participation and persistence in learning programmes. Regarding the emotional effects of poverty, living in conditions associated with poverty created psychological and emotional pressures for participants. Poverty also created emotional and psychological pressures for participants. Some participants experienced anger towards the welfare system because of the limited support provided. Fear of personal safety was another consequence of poverty. Participants further experienced feelings of shame and low self-worth, even when their personal circumstances improved (Flynn *et al.*, 2011.)

3.3.1 Institutional Barriers

3.3.1.1 Barriers experienced in the learning environment

Sánchez, Rodríguez and Martínez (2019) reported the results of a study conducted with 86 students participating in a master's degree course, identifying students' perceptions of the barriers they experienced in their learning environment. The following barriers were identified: a lack of teacher training and thus teacher competence, which influenced teachers' ability to respond to learners' diverse needs;

identification of physical barriers to learning; limited available resources; and the underuse of available resources. Furthermore, teachers had a negative attitude toward the inclusion of students with specific educational needs and had low expectations for students' abilities. The following interventions were suggested: designing learning activities that meet learners' learning needs; utilising a variety of learning delivery methodologies; developing teachers' competencies and their commitment to utilise the research findings to reduce the identified barriers on a practical level (Sánchez *et al.*, 2019).

Purtell, Talbot, and Moore (2020) examined the barriers that learning assistants (LAs) face in the classroom. Learning assistants have completed an undergraduate qualification and provide support for the educator on the training course that the learners have completed. Their role is to keep learners on track by clearing up any confusion and facilitating discussions on the subject matter. The approach intends to close learning gaps amongst learners (Purtell *et al.*, 2020).

A study examined the use of English as a primary language for the learning and teaching of isiXhosa-speaking foundation phase learners at a historically disadvantaged school in the Western Cape, South Africa. The purpose of the study was to determine whether these learners experienced a barrier to learning due to their primary language being different from the English language they were taught and assessed in. There were 12 foundation phase learners, eight foundation phase teachers and 12 parents/caregivers who participated in the study. Teachers and parents participated in the study, and focus group interviews and individual interviews were conducted with foundational phase learners (Salie, Moletsane, & Mukuna, 2020).

The study found that foundation-phase learners experienced cognitive challenges due to their limited proficiency in English. This caused them to have low marks, which created feelings of stress and anxiety towards school. Their limited exposure to English severely affected their writing, reading, and understanding of the subject matter in their schoolwork (Salie *et al.*, 2020). The results revealed that when learners could not express themselves freely due to limited English vocabulary, they suppressed information, which led to poor test performance. Learners experience a

psychological social barrier when they fear being exposed for their weakness in English and being labelled negatively. The inability to communicate effectively leads learners to experience low self-esteem (Salie *et al.*, 2020).

The data collected showed that participating parents believed their children's academic performance could have improved if taught in their mother tongue. Learners would gain a better understanding of the curriculum content and develop a more positive attitude towards learning. Data collected from participating teachers shows that most parents were not actively involved in supporting their children's academic development (Salie *et al.*, 2020). The one reason is that parents lacked literacy and competence in English, which prevented them from assisting children with their homework. The findings further showed that parents required support from the school in making decisions which would benefit their children's academic performance. The results indicated that when parents were uninvolved in their children's academic development, children who were struggling to cope fell further behind, thereby widening their learning deficit. Where learners could not catch up, the learning gap eventually led to learners not passing to the next grade or dropping out of school (Salie *et al.*, 2020).

The researchers recommended that the learners' primary language be used to unlock the curricula for foundational-phase learners. Learning can be enhanced when parents emphasise the importance of school and demonstrate that learners' schoolwork is worthy of their attention and support. Collaboration and consultation between teachers and parents were noted to help learners reach their potential. Efforts to communicate effectively with parents were also noted, as was appreciation for the support provided by parents of foundational phase learners (Salie *et al.*, 2020).

In a paper by De Kadt (2005), it is noted that, for the first time in 1993, recognition was granted to nine indigenous languages in South Africa. This essentially meant that equal status was awarded to these languages, that education and government materials would be available in these nine indigenous languages, and that official status would therefore be granted to them. The literature states that the previous government, before 1994, prioritised language development to a much greater extent than the current government does in this area (De Kadt, 2005). The literature further

states that a substantial shift in the government's approach to language development is necessary if the nine indigenous languages are to have the same status awarded to English and Afrikaans in our current times. Slow progress in policy development has contributed to language posing a barrier to education. The literature notes that the problem in education occurs when learners are assessed in a language different from the one in which they learn. Secondly, educators in some instances deliver training in a language in which they are not proficient. These factors negatively affect the learner's learning experience and pose a barrier to the quality of learning (De Kadt, 2005).

The literature suggests that for language not to be a barrier to learning and development, there is a need for policy development and implementation. It further states that delivering training and assessments in a mother tongue language could assist in resolving language challenges in the learning environment. Language development helps ensure that all 11 official languages in South Africa are equally recognised. Tertiary institutions and cultural bodies which encourage the usage of the nine indigenous languages play a role in encouraging all South Africans to participate in utilising the nine indigenous languages of South Africa in their everyday life with the goal of embracing South Africa's indigenous languages, which is linked to the South African identity (De Kadt, 2005).

3.3.2 Situational Barriers

3.3.2.1 Perceived barriers to learning from the social environment

Fuchs (2000) studied how companies are transforming their workplace environment by implementing appropriate strategies, such as encouraging worker participation, decision-making, teamwork, and continuous learning. The study aimed to identify the employer and employee perspectives and reactions about the educational opportunities provided. This transformation is set to occur by encouraging worker participation, decision-making, teamwork, and continuous learning. The study found that some traditional industries experienced varying levels of resistance from "blue-collar" workers who mainly performed manual labour. The study examined the

provision of a post-secondary degree programme to industrial or manufacturing (traditionally called “blue collar”) (Fusch, 2000).

Fusch (2000) notes that most blue-collar workers in the manufacturing industry do not pursue higher education due to perceived barriers to learning. Fusch (2000) believes that blue-collar workers' perceptions may stem from their cultural, social, familial, personal, or financial circumstances. Fusch (2000) believes that if an employer provides educational opportunities as well as identifies and addresses barriers to learning, blue-collar workers may change their perception and may therefore be willing to participate in educational programs (Fusch, 2000).

The literature by Fusch (2000) cites a study by Tomasko and Dickinson (1991) on the UAW-Ford Education, Training, and Development Program, which found that workers' perceived barriers to learning seriously constrained their participation in educational programs. The study examined the impact of life/education advisors (education and career guidance counsellors) on worker participation in the UAW-Ford Education, Training, and Development Program. In the study, the UAW-Ford Education, Training, and Development Program used pre- and post-test sampling of both an experimental and a control group across four facilities. All subjects of their study had access to the programs and tuition; however, only the experimental group had access to on-site life/education advisors.

In the study by Fusch (2000), the partnership between Ford Motor Company and the United Auto Workers (UAW) provided employees with educational opportunities through arrangements with local educational institutions at 29 plants. In this employee participation study, 55,000 employees and their spouses participated in basic skills enhancement; 39,000 employees participated in personal development courses; and 48,000 active employees enrolled in college and university offerings held on-site at 29 plant locations. Eighteen hundred employees and eligible family members graduated from this program, with twenty-five Associates, nineteen Bachelors, and six master's Degrees. The study concluded that, in this UAW-Ford study programme, both Ford and employees benefited from the creation of life-enhancement opportunities (Fusch, 2000: 90).

The study by Fusch (2000) refers to the importance of recognising that individuals have needs and generally have concerns about self-development and fulfilment. This could be because of their need to create an identity through their position in society, which in turn serves as a motive to participate in an employer-provided education initiative. Demonstrating to workers that education is directly proportional to a specific, desirable career or financial opportunity may provide the superior rationale needed for them to see the value of the educational opportunity (Fusch, 2000).

The literature included a study of an applied science degree program in operations management offered to local industry at a technical college. The course was customised to the learner's needs, allowing them to study at their own pace and directly apply their learning in the workplace. The customisation of the programme allowed the facilitator to serve as a mentor, meeting with students at the workplace regularly according to a schedule (Fusch, 2000). The literature cited an example of two blue-collar workers who could not attend classes because they were away from their workplaces due to family and work responsibilities. They appreciated that training was conducted at the workplace and that they could use some time there to study the programme. The support provided by the facilitator and the training manager helped encourage blue-collar workers to remain committed to using the programme to develop themselves. The literature noted that some blue-collar workers had no computer skills and had no orientation to the internet. Providing blue-collar workers with basic computer skills was one method to encourage their participation in the programme. The importance of the study is that identifying workers' perceived barriers to participation can help reduce perceived barriers to learning (Fusch, 2000).

Furthermore, the study showed that social support and guidance agents had a direct influence on females and a direct and indirect influence on males by reducing their perceived barriers to participation in educational opportunities, such as the UAW-Ford Education, Training, and Development Program. The study revealed that by removing barriers to learning, workers changed their behaviour, engaged in new productive behaviours, and developed a more positive shift in their mindset and attitude towards learning. (Fusch, 2000).

A study by Alzouebi, Ridley, and Alzouebi (2020) examined factors influencing Arab women in the United Kingdom who experience social exclusion due to their inability to communicate in English. The study was conducted in South Yorkshire, with 10 female Arab learners. The study was focused on gaining insight into the role of the educational background and the significance of identity in language development. The study aims to support educators of English for Speakers of Other Languages (ESOL) so that they may identify and address issues that create barriers to the integration of this group into a wider society that converses confidently in English (Alzouebi *et al.*, 2020).

The study's findings reveal that parental education influences offspring's education, and educated mothers with high socio-economic status are more likely to directly support their children in learning both their home language and a second language. The educational backgrounds of some learners also meant that some of the ESOL learners attended institutions in their home countries, where the level of resources provided enabled the availability of better-trained English as a second language teachers, which made their learning easier in the UK (Alzouebi *et al.*, 2020). A predictor of Arab women's motivation was found to be the individual's and their family's beliefs regarding the importance and value of education. The families of Arab women who hold a high regard for education were able to encourage them to reach their full potential and succeed in their journey of learning English as a second language. Some Arab women initially had little power to speak up in class; however, after a few months in the classroom, they began to gain confidence in speaking English and felt more self-assured to participate (Alzouebi *et al.*, 2020). The study also noted that most of the Arab women in the ESOL class were married and had children. These women believed their educational career goals were unattainable because they had young children to care for, which made it difficult for them to fully commit to the ESOL class. This resulted in Arab women not being able to participate in class, concentrate on lessons, or focus on learning after class. The women's attention was diverted to concerns about their children's health, their domestic responsibilities, and even their fears about how they would perform in assessments (Alzouebi *et al.*, 2020).

The social and cultural factors identified in this study affect the motivation of Arab female learners to learn English as a second language. The various factors experienced by the participants contribute to shaping their engagement with the

course, their interaction with other learners and their achievement in learning English as a second language. The study mentions that the participants recognised that their investment and continuous commitment to the ESOL class were necessary for their success in learning English. They acknowledged that this learning opportunity will enable them to have a better future in the UK and to be placed to assist their children with their academic studies (Alzouebi *et al.*, 2020).

Groener (2019) emphasises the importance of removing structural and institutional barriers to adult learning in institutions offering post-school education. This is related to the South African government's plan to create a million learning opportunities for adult learners, specifically targeted at black adult learners. The initiative aims to offer particularly disadvantaged black adult learners an opportunity to break free from a life of poverty through post-school education. The government established the post-school education sector after the promulgation of the South African constitution. The PSEC encompasses adult basic education, technical and TVET programmes, higher education, and workplace-based learning programmes. South Africa's constitution promotes adult basic education as a human and equal right. With barriers to adult learning posing a challenge for adult learners, especially disadvantaged black adult learners, who live in conditions of poverty, it is apparent that not all rights translate to equality (Groener, 2019).

Groener (2019) considers how the government can provide disadvantaged black adult learners with fair opportunities and access to participate in post-school education. The aim is to provide disadvantaged black adult learners with socioeconomic rights to access social assistance. This will promote socio-economic justice and remove socio-economic barriers (Groener, 2019).

Successful attainment of post-school education is considered when disadvantaged black adult learners advance from a household-poverty state into higher-income groups, thereby achieving a better standard of living. Groener cites information analysed by Zizzamia, Schotte and Leibbrandt from the National Income Dynamics Study (NIDS) (2019), which indicates a relationship between household heads' educational levels and poverty levels in South Africa. Their findings indicate that of

household heads with less than matric (Grade 12) level of education, 41.87% are “always poor”, as opposed to 7.41 who are “ never poor”, of household head with matric level of education, 11.65% are “ always poor, as opposed to 43.50% who are “never poor ” and of household heads with tertiary education, 1.26% are “ always poor” as opposed to 62.51% who are “never poor, “ The finds suggest that household heads with less than matric experience deep levels of poverty as opposed to household heads with a better educated household. Disadvantaged black adults who have less than a matric and who experience poverty, further experience socio-economic barriers, which serve as a deterrent to the willingness and enjoyment in accessing post-school education. Socio-economic rights, access and successful completion of post-school education are critical in achieving the government’s transformation goals. Social assistance programmes to alleviate poverty and provide access to post-school education are vital in helping disadvantaged black adults step out of poverty and improve the quality of their lives (Groener, 2019).

A study (Cabus, Ilieva-Trichkova & Štefánik, 2020) conducted across 28 countries in the European Union examined adults' participation in learning and identified determinants at the individual, household, job, employer, and system levels. The study aimed to gain an understanding of the variability in adult learning participation across Europe. The literature mentions that the European Union has a minimum target of 15% for the enrolment of adults aged 25–64 enrolled in formal or non-formal learning activities. The literature reports differences in adult-level participation across countries in the European Union, ranging from less than 2.5% in Romania and Bulgaria in 2016 to more than 20% in Iceland, Finland, Denmark, Sweden, and Switzerland (Cabus *et al.*, 2020).

The study explored the barriers to participation in adult learning among disadvantaged adults across Europe. Data from the European Union Labour Force Survey (EU-LFS) collected in 2016 was used, and a multi-level modelling technique was applied. The model for the study examined characteristics of individuals, their households, jobs, employers, and the environment in which learning takes place. The study examined the multiple layers of the challenge of participation in adult learning to reveal the barriers that distinguish participants from non-participants. The literature states that adult learners participate in education because, as individuals invest in educational

activities, they experience increases in productivity, income, and skill sets. Adult learners understand that the benefits of participating in learning outweigh the costs, and therefore, this mindset influences their decision to engage in further learning if they perceive it as addressing their needs and expectations (Cabus *et al.*, 2020). The literature also mentions the interaction between the individual and the social context, where the value of participation, participants' attitudes towards learning, and the likelihood of adult learners participating interact and become influential in the learning process. The literature identifies barriers to participation in adult learning, including situational, dispositional, and institutional barriers. Situational barriers relate to an individual's life situation at a given point in time. Dispositional barriers refer to an adult learner's personality traits or personal qualities developed through prior learning. Institutional barriers, including practices and procedures that discourage and prevent access to further learning opportunities (Cabus *et al.*, 2020).

The literature notes that adult learners have a sense of their own need to participate in adult learning; however, due to certain restrictions, they may be prevented from taking action to pursue learning opportunities. The interaction between structurally and individually based barriers creates an interplay among role players. This includes participants' intentions, needs, attitudes, and other behavioural characteristics, as well as their personal characteristics such as gender, age, income, and social/cultural capital (Cabus *et al.*, 2020).

Educational institutions and workplaces provide a source of learning, and the country's social policy, where the participants live, can also influence adult learner participation by fostering a society that encourages lifelong learning (Cabus *et al.*, 2020).

The study focused on a target population of 1.6 million employed adult learners living within the European Union, and the sample covers 27 European member states. A Generalised Structural Equation Modelling (GSEM) technique was used to observe the association between independent and dependent variables. The study revealed that adult learners in more routinised jobs experienced lower participation in adult learning. The study further revealed that working longer hours was associated with lower participation in adult learning. The financial costs of education also contributed

to low levels of adult learning participation, as government subsidies were not offered in some European countries. This was evident in most countries where labour-market policy was not aligned with adult education policy. The high perceived costs of adult learning limit an individual's ability to participate in it (Cabus *et al.*, 2020).

European civilians are mainly only in support of financing educational opportunities for employees, where the training is job-specific and less of a general transferable skill. Perceived training costs lead to lower participation in adult learning (Cabus *et al.*, 2020).

The study found a negative association between the perceived costs of adult learning and participation rates among low-educated and highly educated adult learners. Less educated adult learners required more support from employers and were therefore more vulnerable to exclusion from adult learning opportunities. The study focused on disadvantaged groups in similar life situations, including employed low-educated persons, employed low-educated young adults, and employed migrants. The literature notes that previous studies show that those with lower educational attainment participate less than those with higher educational attainment, as they have lower educational aspirations or lower self-confidence. This psychological driver of adult learning is referred to as a dispositional barrier (Cabus *et al.*, 2020).

Institutional or system-level barriers at the regional or national level affect the level of adult learning participation. The literature also notes that regions with higher employment rates or better economic performance have higher rates of adult learner participation because the workplace provides an additional supply of training, especially where there is a skills shortage and significant innovation. It is important to note that higher levels of participation are also greater where employment protection is stronger (Cabus *et al.*, 2020). The various barriers to adult learning contribute to the inequality in participation in adult learning within a society. The literature suggests that a society with a younger adult population and one in which initial education provides more general than specialised skills is more likely to have higher adult participation in learning, as the need and motivation for further education are greater. The study looked at both formal (training that is planned and guided by an educational institution

and non-formal (training that occurs outside of a formal educational system) adult learning.

The study revealed that ordinary working hours are negatively associated with participation in formal adult learning and positively associated with participation in non-formal adult learning. This suggests that non-formal adult learning mainly occurs through workplace training. It was further observed that overqualified individuals who occupy low-skilled occupations are more likely to participate in adult learning. It was also found that working in an occupation with a higher risk of computerisation is linked with a lower adult learning participation. The results of the study further suggest that household-related barriers play a substantially more important role for those under 30 and poorly educated, whereas the prevalence of individual characteristics poses the greatest threat in variables related to formal adult learning participation among the other considered groups. Simultaneously, system-level variables (the country/region's institutional and policy framework) pose a threat to disadvantaged groups (especially the low educated). The literature indicates that increased public expenditure on education leads to higher participation in adult learning (Cabus *et al.*, 2020).

The study by Pescaru (2019) analyses adults' perceptions of learning based on their own experiences and on their perceived availability for learning after retirement from professional activity. The study found that, even though learning at an adult age entails more effort, energy, and time, participants have a positive perception of learning, as they are aware of its importance. The study also points out that interest in learning is not as intense for adults after retirement from professional activity. The perception that adults have towards learning varies considerably among different individuals. It points out that others engage in continuous adult learning throughout their lives. Others do not understand the aim, the significance, and the opportunity which learning provides. They trust what they have learnt to be sufficient, to see them through their professional and personal lives, or they regard their age, limited learning abilities and minimal learning experiences as reasons not to pursue further learning. Perceptions of learning and the learning environment play a significant role in the adult's decision to participate in learning opportunities (Pescaru, 2019).

3.3.3 Dispositional Barrier

3.3.3.1 How adult learner characteristics influence the learning process

According to Bonner (1982), certain adult learner characteristics will influence the conditions of learning. Such characteristics are related to memory, experience, reaction time, and psychological barriers. When learner characteristics exist, which can impede the learning process, it is important to assist the learner in establishing connections between known information and what is to be learned. Assisting the learner in clarifying expectations, setting lifelong objectives, identifying ideas and practices to be unlearned, and providing feedback on progress are strategies to support the adult learner. The literature suggests that characteristics related to memory and reaction time may be best suited to learning verbal information. The literature further states that the problem adult learners face primarily concerns short-term memory. Three phases of memory are described, and these include registration (exposure to stimulus, acquisition of information, encoding), retention (persistence of encoded information), and recall (search and retrieval) (Bonner, 1982).

The literature examines three psychological barriers that adult learners face, which interfere with the learning process. Some adult learners experience guilt about how their role as a student will affect their family, including spending less time with them and contributing less money, as they pay student fees. To enhance transfer of learning, opportunities can be provided to assist the learner in transferring new learning to family and work situations when the content is appropriate for such transfer (Bonner, 1982).

Lack of confidence is another factor which causes adult learners to doubt their ability to study and their capacity to learn. Adult learners are already learners in informal learning situations. This is based on their experiences derived from real-life situations. By recognising the value of informal learning, adult learners can be encouraged to participate in formal learning experiences. By recalling prior learning, the adult learner is reminded that they have learned concepts and skills related to their current learning. By suggesting ways to study or practise skills, guidance can be offered to adult learners. Giving feedback to the adult learner is one way of clarifying a

misunderstanding of information. Educators can create appropriate conditions for learning by providing comments to adult learners that support both correct and incorrect performance (Bonner, 1982).

3.3.4 Academic Barrier

3.3.4.1 Appropriateness of resources in the learning process

Media refers to the “physical means of presenting stimuli to the learner’ (Bonner, 1982; Mullen & Mariam, 2019). The media used in adult learning include books, charts, videos, discussions, lectures, and computer-assisted instruction. The literature states that the appropriateness of resources (media) for adults is dependent on certain learner characteristics, such as interest in the topic, opportunity for application, level of education, and age. The literature further states that the effectiveness of learning resources also depends on interests at different stages of adult development, memory, and the pacing of learning. Vision also plays a role in the adult learner’s learning process. Adults’ vision gradually declines from the ages of 18 to 40, sharply declines for many from 40 to 45, and then declines less rapidly from 45 onwards. In addition, after age 18, there is a gradual decline in the ability to adapt to the dark, and the field of vision narrows slightly. The type of media selected, developed, and used should consider ways to assist adult learners in compensating for age-related changes in vision. One way to assist adult learners will be to produce clear, large visual materials. Making sure that those light conditions are not hurtful to the eyes and combining audio and visual presentations, reducing glare, closer seating and allowing longer exposure time are other ways to assist in creating appropriate learning conditions (Bonner, 1982; Mullen & Mariam, 2019). The literature further suggests that barriers to adult learning are often interconnected, with institutional, situational, and dispositional barriers influencing one another rather than occurring independently.

3.4 TRANSFER OF LEARNING

The literature by Rournell (2019) notes that the field of adult education has expertise in instructional design and learning delivery methodologies; however, learning transfer among adult learners remains a challenge for the adult education industry. In traditional education, practices are not provided that effectively promote the transfer

of learning beyond the initial learning event. The development of a transfer-of-skills process should be an intentional aspect of the learning process. The literature describes the learning transfer process as the utilisation of newly acquired knowledge and skills within a work or life context. The newly acquired knowledge and skills must be applied over time for it to be successful (Rournell, 2019).

Rournell, (2019) further mentions that learning transfer to a real-life context is where the current literature on human resource development falls short. Furthermore, if the learning design process is not ongoing, allowing learners to apply their knowledge and skills in a relevant context, the learning will result in another statistic in an educational bank. To avoid this, the literature recommends implementing application objectives and establishing a process for transferring learning into a broader real-life context. The application objectives align with Bloom's (1956) taxonomy, as it focuses on learning beyond memorising and understanding, towards application and critical reflection. In addition, the objective of application of learning also relates to Knowles' (1975) principle that adults need to know why they must learn something, and that they need to find the learning personally meaningful in terms of addressing an identified need or enabling them to achieve a specific objective. The transfer of learning process enables transformative learning. Transformative learning involves a process of creating and combining new and revised interpretations of the meaning of a lived experience. Through the integration of old and new knowledge, skills, and perspectives, the learning process is applied. Through a process of cognitive transfer, previously acquired knowledge is used to function in a new situation. For a cognitive learning process to occur, adult learners must have a sufficient knowledge base to deal with the new circumstances and environment (Rournell, 2019).

The literature notes that reflecting on one's own world views and developing a thought process are needed to allow the transfer of learning to take place successfully. Support from human resource development (HRD) professionals further allows an opportunity for engagement and application of the learning process. Educators and adult learners should work together to reinforce the learning transfer process by developing and implementing strategies that help adult learners internalise and act on their acquired knowledge, skills, and experience (Rournell, 2019).

Thomas (2007) notes that adult learners participate in learning interventions; however, little attention is given to the transfer of learning, which should occur in the workplace. Thomas (2007) further refers to Benjamin Bloom's taxonomy of cognitive domains. Bloom's taxonomy of learning consists of six levels: knowledge, comprehension, application, analysis, synthesis, and evaluation. Knowledge is the lowest level. It is the foundation of learning and involves recalling information. The next level is comprehension, which involves understanding and is based on prior knowledge. Application is the next level of Bloom's taxonomy of learning. Opportunities must be provided to test out new information and skills. Analysis and synthesis are the next level, where learners break down or classify information or skills into subparts and view information in new ways. The last level involves the learner's reflection on newly acquired knowledge and skills. Insight is used by learners to develop new approaches for applying acquired learning (Thomas, 2007).

According to Darwazeh and Branch (2019), in 2001, Bloom's taxonomy was revised by Anderson and Krathwohl to be more relevant to the work of teachers and learners in the 21st century. Bloom's 1956 taxonomy of learning was revised to: Remember, Understand, Apply, Analyse, Evaluate, and Create. Anderson (2001) incorporated two dimensions into the revised taxonomy, as opposed to the previous one. The first dimension refers to the kind of knowledge to be learned, and the second dimension refers to the cognitive processes used to acquire knowledge (Darwazeh & Branch, 2019).

Thomas (2007) mentions that the adult learner and educator can build a relationship of trust if the adult learner is encouraged to participate in the design and delivery of the training. This would take the form of learners expressing their learning needs, participating in discussions about the learning content, and evaluating the effectiveness of the learning programme for purposes of enhancement. This involvement of the learner in the learning process makes the adult learner feel supported and motivated to transfer their learning to the workplace. The approach suggested by Thomas clearly aligns with Kowles' (1975) principle of adult learning, which holds that the learner is an experienced individual and that experience can be utilised fruitfully in the learning context (Thomas, 2007).

Barriers to the transfer of learning can be attributed to adult learners' lack of foundational knowledge needed to effectively apply new knowledge and skills. Another evident barrier to the transfer of learning is when adult learners lack personal motivation and confidence to effectively apply their newly acquired knowledge and skills to different situations in their daily life (Thomas, 2007).

3.5 PERCEPTIONS OF ATTITUDES TOWARDS LIFELONG LEARNING

Pescaru (2019) notes that learning arises from a need and an initiative to acquire knowledge, values, and skills to live in a world where the dynamics of change are dynamic. When adults learn continuously, they seek answers to their professional and personal needs, find relevant learning content, and explore new training and development methods. When learners recognise the transformation that learning brings, they see the importance of lifelong learning. Learners who experience the value in lifelong learning become creative, flexible, knowledgeable, and adaptable to changes in their careers and in society. They perform better at work and in everyday life and develop the courage to pursue new opportunities (Pescaru, 2019).

The literature points to the benefits of lifelong learning for the individual, including opportunities for new jobs, earning an attractive salary, improving one's quality of life, building a social network, and increasing self-confidence. Adults are finding it necessary to engage in learning as a means of coping with the challenges of the contemporary world. This is especially true because knowledge is becoming obsolete as the world changes, and secondly because of career instability (Pescaru, 2019).

The literature mentions that research in the field of neuroscience has revealed new information about the brain in relation to learning. It points out that it is not necessarily true that in all cases the older one gets, the more difficult learning becomes. Learning capacity is more possible amongst healthy individuals who allow their brain to experience mental exercise, and who an individual is continuously exposed to new learning experiences. The literature mentions that neuro-flexibility is the property of the brain which can change its structure through thinking and other related activities. It is the flexible part of the brain which is involved with thinking, memory, and learning.

The brain's ability to respond to learning, which is essentially the brain's plasticity, is the gateway to modifying the brain, allowing lifelong learning to happen more easily. The literature also mentions that permanent self-education can be used to supplement adult education. Self-education is referred to as the inferences one makes based on their experiences and feelings. This information is useful for adult learners, as it encourages learning to take place, regardless of age (Pescaru, 2019).

The study used a questionnaire which was given to a group of 124 adults which comprised 72 women and 50 men. The participants were randomly selected for the study. Their age ranged from 35 years to 65 years, and all the participants were employed in the education and healthcare sectors. The study mentioned that 40 of the participants have post-school education, and 84 of the participants have higher education certificates.

The results of the study showed that the majority of the participants perceived the length of the process to be a lifelong one, while a small number of participants had the opinion that the learning process is restricted to the stage of school or university completion. The study found that 9.70% of the respondents stated that they only engage in learning when it was required of them to do so, and 8.87% of the participants engaged permanently in learning. The study cited that some adults engaged in learning against their will, and they mentioned that the resistance to participating in learning was because of factors pertaining to work pressure from employers and constraints from family and friends. The study revealed that more than 50% of the participants attended a training intervention during the past two years, during which the study was conducted. The study showed that several participants attended a training intervention during the past two and five years, especially women who are in possession of post-high school studies who were over the age of 50 years old. The study showed that the participants understand that professional and personal development education and training programmes will help them gain new competencies or update existing knowledge and skills to make them more productive and help them cope better in their personal lives. The study showed that 40% of the participants' learning expectations were met, and 50% of the participants believed the training interventions only met their expectations to an extent. The literature emphasises the importance of adult learners ensuring that they identify their training needs and

expectations before participating in a learning intervention, to ensure there is an alignment of their objectives and the training course (Pescaru, 2019).

Regarding the type of learning in which the participants participated in the results of the study found that 19 adult learners participated in formal learning settings, 6 adult learners participated in non-formal learning situations, 3 adult learners participated in informal learning contexts, and 48 of the participants experienced learning in all three learning contexts. The study found that 26 of the participants believed learning was linked to their careers, and three participants who were over the age of 53 believed that their learning was only associated with their personal hobbies, and 42 of the participants believed their learning was linked to their career, personal hobbies and to the demands of society (Pescaru, 2019).

The study cited that the two primary barriers to learning, experienced by participants, are those of limited financial resources and fear of failure. Fear of failure is primarily experienced by the women participants who hold post-high school certificates and who are aged over 50 years old. Some of the other barriers to learning include work pressure and responsibilities, age-related challenges, family responsibilities, available time, a lack of support from family and anxiety towards tests and exams. The study showed that 49.20% of the participants regarded learning to be important, and 39.52% of the participants considered learning to be extremely important, even though they acknowledged the presence of obstacles in their environment. (Pescaru, 2019).

Several participants (3.23%) believed there is no need to learn throughout their life. This percentage mainly included women with post-high school studies, who may have certain frustrations regarding their chosen professions and experience stress which is associated with their jobs (Pescaru, 2019). The result of the study shows that learning does not have an expiry date and can continue at any age. Learning allows individuals to experience a personal evolution, which brings them towards having an increased level of self-confidence, a more stimulated mind and positive behaviour and attitude changes. Learning in adulthood is also considered beneficial in that it allows individuals to cope better with changes in their career and situations in their personal lives, which require a change (Pescaru, 2019).

A study in Canada was conducted, which investigated the factors which influenced the decision made by Canadian power engineers in the Provinces of British Columbia and Alberta to pursue an advanced certification in the power engineering sector of Canada (Mullen & Mariam, 2019).

The Canadian government has made it a requirement for individuals working with pressurised vessels, systems, and thermodynamic processes to have academic and practical knowledge and skills, which will be supported with a mandatory power engineering certification (Mullen & Mariam, 2019).

The literature mentions that when the possession of a power engineering certification helps to create a career opportunity for an individual, the drive to advance in one's academic journey and career becomes more conceivable. On the other side of the spectrum, cognitive and motivational limitations coupled with the career decisions and actions taken become a source of constraint for the adult learner. For this reason, the personal negotiation process, which encompasses the introspection which an individual does to identify with the learning process, directs their academic ambition and achievement. Introspection is an individual's personal attitude towards learning and is therefore based on their own perceptions (Mullen & Mariam, 2019).

The literature indicated that the industry had a challenge with filling job openings for senior regulatory-mandated positions, because of a lack of power engineers in the managerial category. Central to this study are the factors which influence Canadian power engineers to pursue advanced certification levels. The importance of this study is that this deficit of skills slows down industrial progress in the domains of energy exploration, power generation and manufacturing. This highlights the problem that there are not enough power engineers completing an advanced certification (Mullen & Mariam, 2019).

Currently, industry and institutions of higher learning could use the outcome of the study to obtain a greater understanding of the academic and practical elements of adult engineering education, as well as an awareness of the reasons which prevent and encourage engineers to obtain a higher level of certification. This ties in with the purpose of the study which is to explore the relationship between the independent

variables of time commitment, educational support and time passed since previous certification, which are structural decision factors and humanistic decision factors which are locus of control, increased level of responsibility associated with the role in the job and peer appraisal, with the dependent variable which is the intention of obtaining an advanced certification. The identification of the factors which are responsive in the study may assist in encouraging participation in the advanced certification course (Mullen & Mariam, 2019).

The results of the study revealed that commitment to time, which is spent on studying, should be focused on to encourage commitment to the advanced programme. The study found that the factor of educational support did not have a significant relationship to the intention of participating in the advanced certification programme. The study mentions that a person's locus of control is measured by their personality, which affects their responses to the questions in the survey about the other factors. The study showed that the introduction of a rewards system could minimise the negative effects of the time elapsed since the previous study. The time elapsed factor plays a role when the gap between the previously acquired certification and the possibility of completing the advanced certification increases. As this gap widens, the intention to complete the advanced certification decreases. The above factors which draw power engineers toward advancing their certificate should be further developed to encourage power engineers to improve their career path (Mullen & Mariam, 2019).

De Vito (2009) looked closely at identifying the relationship between adult learning principles and overcoming barriers to adult learning in higher education. The article applied Malcolm Knowles' (1975) principles of adult learning to highlight certain barriers to adult learning. Knowles' principles of adult learning have an impact on the quality of learning that takes place and therefore the experience of the learning journey. The article reiterates the principles of learning which are that adult learners engage in learning when they need to know, learners are self-directed, prior experience provides a resource for learning whether it encourages or inhibits a learner, a learner's readiness to know influences the effectiveness of learning and learners have an orientation towards learning, which allows them to solve problems in work and personal lives. (De Vito, 2009).

The barriers to learning that the article examines relate to adult learners' life circumstances. Accessibility is a barrier to adult learners, mainly regarding available time for learning. This would include their multiple life roles, the claims on their time, the lack of access to affordable post-secondary education, and the lack of the necessary self-efficacy and/or self-belief. Most adult learners have families and full-time jobs, which compete for their time. When classroom schedules are inflexible, when physical locations are difficult to access and when the programme durations are too short, these factors become obstacles for adult learners. The application of Knowles' principles of adult learning can assist educational institutions in addressing barriers to adult learning. External obligations experienced by adult learners cannot be controlled; however, educational institutions can assist by scheduling different times for adult learners to attend class and in different ways, so that there is less competition with existing obligations. Services offered by the educational institutions pertaining to admission, academic and financial aid advising, registration and the library should be available to adult learners, at convenient times and through online systems (De Vito, 2009).

The duration of academic programmes could work better for some adult learners if they are shorter in duration and result in immediate credits. The offering of non-credit bearing programmes can support adult learners to improve their basic skills so that they can enrol on qualifications and not feel frustrated or want to abandon the programme. Pre-programme assessments and a needs analysis help instructional designers and educators to design and develop problem-centred learning programmes that factor in the previous experience of adult learners, which are relevant to learners' personal goals and their needs (De Vito, 2009).

Regarding affordability, the cost of education for adult learners reinforces the setbacks they face. Financial assistance programmes offered to adult learners are mainly for degree or credit-bearing learning programmes, which limits their learning programme options. The payment options for adult learners can be discouraging for adult learners when they are required to make payment in full before registration for a learning programme. When educational institutions offer repayment options to adult learners, it assists them to carry the financial cost while managing other financial obligations (De Vito, 2009).

An opportunity or challenge for educational institutions is that once barriers to adult learning are identified, they will have to decide on how best to overcome these barriers to learning. The article highlights the point that by virtue of educational institutions applying the purpose and aims of andragogy, they can take accountability for how they promote adult learning to prospective and existing learners. Collecting, recording, and publicising relevant adult learner data relating to enrolment, progress, completion rates, and economic gains can allow for improvements to be made, which can help educational institutions to overcome barriers to adult learning. The consideration of Knowles' principles of adult learning allows for barriers to adult learning to be addressed before learners become discouraged about their learning journey. In this regard, the current study proposes to provide such information in the South African post-secondary skills development context (De Vito, 2009).

It is valuable to understand Knowles' principles of adult learning, as the principles of adult learning impact the design and conduct of learning programmes, which can result in creating barriers to adult learning (De Vito, 2009). Access to learning and development opportunities for adult learners can prevent them from participating in learning interventions. Accessibility relates to available time, flexibility or inflexibility of schedules, programme duration, access to locations and the mode of instruction for learning. Barriers of access to learning in the post-school environment can be overcome by applying the adult learning principles of the learners' need to know, the self-concept of the learner and the motivation to learn. Institutions of learning can offer classes at a variety of times and offer academic programmes with some degree of flexibility and in different ways to accommodate adult learners and their external needs. Offering pre-programme assessments to determine the learner's level of knowledge and understanding will also assist in determining if they have the requisite knowledge and skills to cope with the demands of the academic programme (De Vito, 2009).

The barrier of affordability contributes to the barriers to adult learning. Adult learners who have limited financial options or experience limited loan repayment options reinforce the challenges that an adult learner faces, since they must meet external financial obligations as well. The motivation of an adult learner to want to learn will be

enhanced if an adult learner feels financially supported by their learning institution. This barrier to adult learners can be addressed at an institutional and societal level, which encourages adult learning (De Vito, 2009).

Adult learners are not given the same opportunities as traditional full-time learners to have discussions around the improvement of the quality of learning they receive or the strengths and weaknesses of the learning experience. Having these discussions with adult learners, as well as offering the same academic programmes which are available to traditional full-time learners, can address the barrier of accountability within educational institutions. When the goals and purposes of offering learning opportunities to adult learners are aligned with Knowles' (1975) principles of adult learning, according to the uniqueness of the adult learner and the learning institution, the needs of adult learners will be considered. Data collected from adult learners can be used to determine how the alignment of Knowles' (1975) principles of adult learning to its educational programmes and policies is working towards overcoming barriers to adult learning (De Vito, 2009).

A study was conducted with 52 adult learners in the Ukraine who were understood to be military servicemen, returning home from a war zone. The participants were going to begin a new civilian life, with their existing experiences, which were trauma-based. As part of the military servicemen's reintroduction into civilian life, the adult learners were taught English as a foreign language. The reason for the training was to help them acquire new knowledge for purposes of self-development, self-improvement and to assist them in becoming competitive in the labour market (Alhasov, Verbytska and Kolenichenko, 2020).

The purpose of the study was to look at the learners' readiness to learn English, to investigate the barriers to studying English and to develop the model of an English teaching environment for adult learners within university extracurricular. The continuous developments in technology and intellectual competition make gaining new competencies imperative to keeping abreast of developments in the economy. The teaching of the English language to the participants was a way to help them adapt to the conditions of their new civilian life (Alhasov *et al.*, 2020).

Interviews and focus group sessions were conducted with the participants. The results of the study revealed that most of the participants showed a high level of readiness for learning English. Some of the barriers to learning, experienced by participants, included a fear of making mistakes during classroom discussions, a fear of expressing their opinions, a fear that the course might be too difficult for them to understand and a lack of confidence in themselves. Some of the other barriers highlighted by participants included a lack of free time to study and an inability to organise their free time, when they do have it (Alhasov *et al.*, 2020).

The results of the study further highlighted that, in terms of the environmental conditions, appropriate teaching conditions will assist participants to overcome their barriers to learning. Diagnosing the learning needs of adults, helping them to carry out their lesson plans can contribute to creating a positive learning environment for adult learners. The results of the study indicate that motivational factors influence the learning process, which links with the adult learning principle of motivation. When adult learners feel motivated based on a need they have to reintegrate into civilian life, their drive to become cooperative partners in the learning process is strengthened. The study highlights that when a learner needs to learn, they feel motivated to engage in the learning process, and when the barriers to the learning process are addressed together with creating a conducive learning environment, the learning event can become a meaningful experience (Alhasov *et al.*, 2020).

3.6 CRITICAL INTEGRATION OF LITERATURE AND CONCEPTUAL FRAMEWORKS

The conceptual framework developed for this study integrates barriers to adult learning, Knowles' (1975) principles of adult learning, and workplace-based learning contexts. The literature presented in Chapters 2 and 3 indicates that adult learning is shaped by the interrelationships between organisational contexts, learning opportunities, and individual perceptions. In the work environments organisational contexts, including managerial support, time allocated, available resources, and acknowledgement, provides a context for adult participation and the application of learning (Henschke, 2009). Nevertheless, participation varies because situational,

dispositional, and institutional barriers constrain access to and persistence in practice (Sánchez *et al.*, 2019). These contextual factors are posed in conjunction with andragogical assumptions which hold that adult learners are self-directed, rich with experience, and will become engaged if the learning matters to them and the activities have relevance (Loeng, 2017).

Within this framework, the design of learning opportunities is a critical component of learning results. Literature identifies problem-centred tasks, authenticity, and prior experience as important conditions for meaningful learning, and transfer (Flynn *et al.*, 2011). Andragogy identifies six interrelated assumptions, which are the need to know, autonomy, experience as a resource, readiness to learn, problem-centred orientation and internal motivation, that together explain how adults develop engagement with learning and the respective conditions for their learning (Knowles *et al.*, 2020). In the intersection of these ideas, there are two key mechanisms that consistently operationalise contexts into learning results:

- I. Perceived relevance relates to the understanding that one's learning is meaningful or practical to their current roles is enhanced when there is diluted explanation of the, "need to know", tasks are ultimately work-related, and the modes of delivery can bend to accommodate adult responsibilities (Kamisli & Özonur, 2017).
- II. Perceived capability refers to the perception of being able to be successful and demonstrate new capabilities, which is fostered by experience, observing others, and receiving feedback, all mostly through the facilitation of peers and educators (Knowles, 1992).

These mechanisms reinforce each other: perceived relevance directs engagement, while perceived capability maintains engagement. Both can be diminished by multilevel barriers that inhibit autonomy and readiness, and both are enhanced when facilitation purposefully harnesses prior experience, enables self-direction, and provides timely feedback.

The study establishes five domains of analysis to guide empirical inquiry:

- I. Learning Experiences: the subjective and professional benefits obtained from authentic, experience-based, and problem-centred activities.
- II. Motivations: the intrinsic and extrinsic forces related to the explicit declaration of purpose and internalised value (Gardner *et al.*, 2022)).
- III. Barriers: situational, dispositional, and institutional limitations that reduce autonomy and readiness, which affect participation and transfer (Boeren, 2017).
- IV. Positive Attributes: the enabling elements such as flexibility and relevance cues that indicate alignment with the adult role and reinforce persistence (Illeris, 2018).
- V. Facilitation: educator strategies and peer support that foster autonomy, utilise prior experience, and supply modeling and formative feedback Elliott *et al.*, 2025).

The conceptual model below, Figure 3.1, illustrates the relationships between organisational contexts and learning opportunities, the mechanisms of perceived relevance and perceived capability, and the five analytical domains that guide the empirical work.

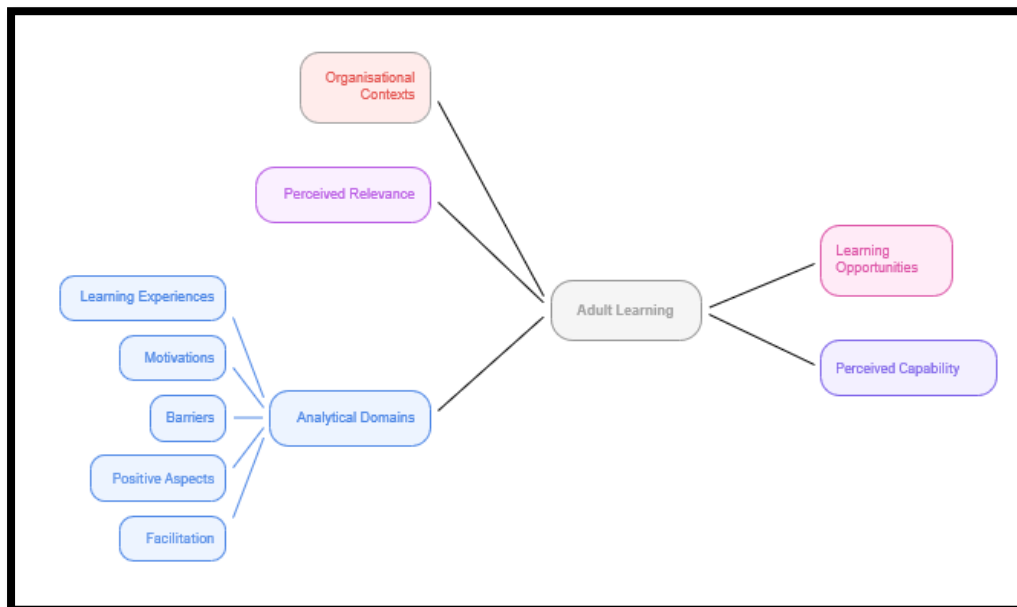


Figure 3: 1: Conceptual model

Source: Researcher's own construction

The framework further demonstrates that workplace conditions, organisational structures, and socio-economic realities may either support or constrain the effective application of adult learning principles within workplace-based learning programmes. A cohesive understanding from the existing literature suggests problem-centred, authentic learning approaches that elicit prior experience increase perceived relevance, and enhance intrinsic motivation, which increases engagement (Illeris, 2018). Articulating objectives and clarifying roles also promote persistence by showing practical value in the learning (Knowles *et al.*, 2020). Conversely, multidimensional barriers such as situational, dispositional, and institutional can restrict autonomy and readiness, which decreases participation and transfer of learning (Boeren, 2017). With good facilitation and peer support, barriers can be addressed through modelling, practice opportunities, and feedback which builds perceived capability for learners (Knowles *et al.*, 2020). Similarly, flexible and contextually appropriate arrangements (time, resources, and recognition) will act as enabling conditions that convert motivation to prolonged engagement and meaningful application (Illeris, 2018). The conceptual framework therefore recognises that barriers to adult learning are shaped by the interaction between adult learning principles, workplace environments, and broader socio-economic conditions. The conceptual framework therefore provided the foundation for interpreting the findings of the study and analysing how adult learners experienced barriers within workplace-based learning contexts.

The literature review adopted a critical synthesis approach by comparing, contrasting and integrating diverse scholarly perspectives internationally and within the South African workplace-based learning context. Instead of presenting the literature as isolated summaries, the researcher critically examined areas of agreement, divergence, and limitation within the existing body of knowledge, particularly regarding the applicability of Knowles' (1975) principles of adult learning in socio-economically unequal and workplace-oriented learning environments. The literature further highlighted tensions between traditional pedagogical approaches and learner-centered adult education models, while also recognising critiques that adult learners may not always possess equal levels of self-directedness due to contextual, institutional, and socio-economic constraints. By synthesising international and South African scholarship, the review established how barriers to adult learning are influenced by broader structural, organisational and individual factors, thereby

providing a coherent conceptual foundation for interpreting the lived experiences of ETDP participants within workplace-based learning programmes.

3.7 CONCLUSION

Knowles' (1975) principles of adult learning serve as the theory which guides this research study. This research study aims to demonstrate the link between Knowles' assumptions of adult learning and the barriers to adult learning within a South African context. Knowles' principles of adult learning have been incorporated into the research questionnaire, which was used to collect the research data for this study. Knowles' (1975) principles of adult learning were useful in providing a rationale for the most effective ways in which adults learn. Understanding how adult learners learn is important in society because it provides insight into the attitudes and intentions of adult learners. Implementing mechanisms that will reinforce healthy attitudes towards learning serves to encourage a culture of lifelong learning amongst adults. The literature review in this study helped to define certain concepts in this study, which allowed for the research questions to be refined to provide greater clarity and focus for the study. Applying the theory obtained from the literature review allows the researcher to be aware of what meaning and values certain words carry with them and to use them in a value-neutral manner (Hennink, Hutter & Bailey 2020).

Barriers to adult learning not only affect the commitment of the adult learner to the learning process, but also the retention and learner graduation rates. Lack of knowledge of barriers to adult learning may prevent education providers from providing an appropriately supportive learning environment. There needs to be a collaborative effort to identify the barriers to adult learning to reduce them, based on adult learner characteristics and the level of support and guidance offered by education institutions, Banks and Dohy (2019). Employers and the South African Government provide financial support to adult learners to make access to post-school education and training through NSFAS and the Skills Development Levy (DHET, 2016).

DHET reported graduate statistics obtained from public and private HEIs, TVET colleges, private colleges, and CET colleges, as well as financial and workplace

learning data for the 2016/17 financial year. According to these statistics in 2016, almost 2.3 million students enrolled in both public and private post-school education and training institutions. Increased output of well-qualified students from tertiary education will contribute to addressing the South African skills deficit (DHET, 2016).

It is through this type of research that learner support, which minimises the barriers to adult learning, can be implemented, to contribute to increasing completion rates of learners from year to year, across various race and gender groups in South Africa. The study aims to contribute to an understanding of the reasons why adult learners do not complete learning programmes which they enrol on (DHET, 2016).

Learning has many benefits for participants as well as the workplace, communities, and society at large, who indirectly benefit from an individual who has a positive change of behaviour and mindset. When learners who continue with post-school learning experience these benefits, it opens the path of lifelong learning and encourages future generations to participate in adult learning. The awareness of how adult learners learn and the barriers they experience during their educational journey will allow educators and institutions of higher learning to better meet the needs of adult learners with considerations for policy review and development. South Africa is moving towards an increase in the number of adult learners participating in learning and development opportunities. This has been brought about because of globalisation, changes in the economy and therefore the requirements of a more skilled workforce. Understanding what poses a barrier to adult learners and what motivates an adult learner will assist in encouraging more adults to engage in learning, which will see a more empowered individual who ultimately becomes a better version of themselves. As more adult learners participate in learning, completion rates increase, and this has a ripple effect on increased workplace productivity levels (DHET, 2016).

The next chapter presents the research methodology for this study.

CHAPTER 4: RESEARCH DESIGN AND METHODOLOGY

4.1 INTRODUCTION

This chapter presents the research design used in the study. It describes the research approach, data collection process, selecting research participants, and data analysis. A qualitative research methodology was used to explore and understand the barriers to adult learning experienced by participants within workplace-based learning contexts. The purpose of the study was to investigate the barriers to adult learning using Knowles' (1975) principles of adult learning. The aim of the research study is to identify and understand the barriers to adult learning in the Education, Training and Development sector, using Knowles' (1975) principles of adult learning.

The data analysis process followed a systematic thematic analysis approach supported by NVivo 12 software. Initial coding commenced with repeated reading of the interview transcripts to familiarise the researcher with the data and to identify meaningful units of information related to barriers to adult learning. Open coding was first applied to generate preliminary codes directly from participants' responses, after which similar codes were grouped and refined into broader categories and themes through an iterative comparative process. The refinement of themes involved continuously reviewing patterns, relationships and conceptual overlaps between codes to ensure coherence and alignment with the research objectives and Knowles' (1975) principles of adult learning. To enhance trustworthiness and credibility, validation procedures included ongoing comparison between the raw interview data, codes and emerging themes, as well as maintaining consistency in the application of coding decisions across all transcripts. An audit trail was maintained throughout the research process by documenting coding decisions, theme development, analytical reflection and revisions made during data interpretation. The interpretation process involved analysing participants' experiences within the context of workplace-based adult learning and interpreting the findings through the theoretical lens of Knowles' (1975) principles to ensure that the analysis remained conceptually grounded and aligned to the study aims.

The research objectives for the study are the following:

- I. To explore how the barriers to adult learning are conceptualised in the existing literature.
- II. To examine how Malcolm Knowles' (1975) principles of adult learning are conceptualised in the existing literature.
- III. To identify the barriers to adult learning experienced by participants in occupational learning programmes.
- IV. To analyse the relationship between the barriers to learning experienced by the learning programme participants and the principles of adult learning formulated by Knowles (1975).
- V. To propose recommendations for minimising the barriers to adult learning, based on Malcolm Knowles' (1975) principles of adult learning.

4.2. METHODOLOGY

Research design can be thought of as the logic or master plan of a research project that explains how the study is to be conducted (Yin, 2003). It shows how all the major parts of the research study– the samples or groups, measures, treatments, or programs- work together to address the research questions. The research design can be seen as an actualisation of logic in a set of procedures that enhances the validity of data for a given research problem. Research methodology plays a significant role in making procedures available for collecting data, analysing, describing, and explaining phenomena (Creswell, Ebersohn, Eloff, Ferreira, Ivankova, Jansen, Nieuwenhuis, Pietersen & Clark, 2019). It serves as a guide to identifying the steps that must be undertaken to complete the study. According to Mouton (1996: 175) the research design serves to "plan, structure and execute" the research to maximise the "validity of the findings". It gives direction from the underlying assumptions to the research design and data collection. Mouton (1996) adds further that "colloquially a research design is an action plan for getting from here to there, where 'here' may be defined as the initial set of questions to be answered and 'there' is some set of (conclusions) answers" (Mouton, 1996: 19). In this study, the research design will mainly focus on three aspects. These are the sampling design, data collection methods, and data analysis approach.

A qualitative research design was selected as the most suitable strategy to examine the barriers to adult learning in accordance with Knowles' (1975) principles of adult learning. Qualitative methodology focused on understanding the lived experiences of adult learners and examining whether using adult learning principles may eliminate some or all barriers experienced by adult learners (Hennink *et al.*, 2020). This approach also focused on the connection between each phase of the research process, with data collection and analysis taking place simultaneously to find meaning (Creswell *et al.*, 2019).

A qualitative research method allows for meaning from the collected data to be obtained through human interaction. This occurs through probing and seeking clarification of responses. Phenomenology is used in this study as a qualitative research design (Creswell *et al.*; 2019). Phenomenology focuses on the phenomena of the participants' "lived experience." Phenology was considered appropriate for this study because it enabled an in-depth exploration of the lived experiences and perceived barriers encountered by adult learners within workplace-based learning environments. This means that the barriers experienced by adult learners, in their own lives, were investigated to determine to what extent the barriers to adult learning connect with Knowles' (1975) principles of adult learning. Phenomenology allows the experiences of the participants to be categorised and analysed to identify the traits that make up the phenomenon. The core meaning of the phenomenon studied is expressed when findings of the study are summarised and shared. Each participant interviewed has experienced different barriers to their learning. The barriers can also differ in intensity based on the biographical information of the participants. The social backgrounds of participants might have an impact on how each respondent experienced barriers to learning. (Merriam & Tisdell, 2016).

The term qualitative research is used to describe *a set of approaches that analyse data in the form of natural language (words) and expressions of experiences (social interactions and artistic presentations)* (Kumar, 2019:15). Qualitative research design was used to gain an in depth understanding of the extent to which barriers to adult learning are experienced by adult learners, in the absence or presence of Knowles' (1975) principles of adult learning, (Kumar, 2019). In this study, Knowles's (1975) principles of adult learning were applied to the phenomenon of learning barriers that

adult learners experience. Knowles' (1975) principles presented a lens to better comprehend this phenomenon. The collected data from the participants is analysed and interpreted in line with the research questions posed in this study.

A qualitative approach was deemed suitable to explore the behaviour of adult learners. This behaviour is largely influenced by the context of their social, economic and cultural background. A qualitative research design provides a map to understand and interpret patterns associated with people's experiences and perceptions towards the barriers of adult learning. More so, this research approach looks closely at their attitudes and feelings as adult learners. In this way, the barriers to adult learning can help the researcher better understand what makes this challenging for adult learners.. As such, a qualitative research method provides the researcher with deeper insights into how adult learners view learning through the lens of Knowles' (1975) principles (Merriam & Grenier, 2019).

This approach further focuses on the daily routines of individuals and communities in their natural environment. The goal is to help the researcher make sense of the meaning people assign to particular phenomena (Denzin and Lincoln, 2003).

Qualitative research makes use of various data collection methods, which are observations and, within the current study, open-ended questions in an interview. Written descriptions of people, events, opinions, attitudes, and environments can also be a source of data (Kumar, 2019).

Phenomenological research focuses on the meaning that participants assign to certain lived experiences and the description they assign to it. The individual descriptions give rise to universal meanings for the collective group of participants (Creswell et al, 2019). Phenomenological research focuses on what all participants have in common as they experience the phenomenon. The purpose of phenomenological research is to break down an individual's experience into a phenomenon and then to describe the nature of the phenomenon. The individual's lived experience is documented, the themes which the participants experience as lived experiences emerge and this is described and interpreted so that it links back to the purpose of the study and back to the research questions.

The researcher acknowledges that qualitative research is inherently interpretive and that the researchers' own experiences, assumptions, and professional background may influence the research process and interpretation of findings. As the researcher is experienced in the ETD environment, there was an awareness that prior knowledge and perspectives regarding adult learning and workplace training could potentially shape data interpretation. To address researcher positionality and minimise bias, reflexive practices were applied throughout the study, including continuous self-reflection during data collection, coding, and analysis. This researcher remained consciously attentive to personal assumptions and avoided imposing preconceived interpretations onto participant responses. Bias mitigation strategies further included the use of a semi-structured interview guide to ensure consistency across interviews, maintaining an audit trail of analytical decisions, and continuously comparing themes against the original interview data to ensure that findings remained grounded in participants' lived experiences rather than researcher expectations. In addition, the use of verbatim participant quotations supported transparency and enhanced the credibility and trustworthiness of the interpretation process.

4.3 RESEARCH DESIGN

This section of the study discusses the research design. The research design section comprises the sampling design, instrument design, data collection technique and data analysis approach. The research design section focuses on qualitative research using a phenomenological approach. The number of participants interviewed for the study is based on informational considerations. The interviewing of participants ceased once no new information was provided from the responses of participants. Determination of a saturation point requires a simultaneous process of data collection and analysis. A tentative number of participants included in this study was an expected number of 15 participants (Merriam & Grenier, 2019).

The study utilised a predominantly deductive thematic analysis approach informed by Knowles' (1975) principles of adult learning, while allowing for inductive insight to emerge from participant experiences. The domains functioned as broad analytical and organisational categories derived from the conceptual framework and theoretical assumptions underpinning the research. The domains provided the overarching structure through which the data were interpreted, while the coding categories

represented the initial labels assigned to meaningful segments of participant data during the coding process. Themes referred to the broader patterns and recurring meanings that emerged through the grouping and refinement of related codes. The thematic analysis therefore involved both deductive and inductive processes: deductive in that the analysis was guided by predefined conceptual domains linked to Knowles' (1975) principles, and inductive in that participants' lived experiences informed the development and refinement of themes within the domains. This approach ensured that the study was theoretically grounded while simultaneously allowing the findings to reflect the participants' authentic experiences and perspectives.

4.3.1 Sampling

Participants in this study were selected using a non-probability sampling design because not all members of the population had an equal chance of being included in the sample. A purposive non-random sampling method was used. The population was selected based on the selection criteria that the participants have completed either the National certificate or Diploma in occupationally directed education and training practitioner at the education and training development practitioner. The knowledge gained from the workplace-based qualifications would be used to improve the performance competency of the participants. Data collected from participants occurred up to the point where no new data were being obtained from participants. The principle of data saturation was applied to ensure that rich data was obtained for this study. This allowed for the experiences of participants to be revealed. (Creswell *et al*, 2019).

Purposive sampling is a sampling technique where the researcher deliberately selects the participants using their judgment about who is in the best position to provide useful information for the study (Kumar, 2019). For this research, participants were selected to explore the barriers to adult learning, using Knowles' (1975) principles of adult learning as a framing structure. The organisation selected is a training and development consultancy that is known for providing workplace education and training services. Sampling continued until the data were deemed to have reached saturation with the participants.

4.3.1.1 Inclusion and Exclusion Criteria

Participants were selected according to the following inclusion criteria:

- **Age Requirement:** Only individuals 18 years and older are eligible to participate in the study; age 18 aligns with ethical standards for adult participation in research.
- **Educational Entry Requirements:** Participants were required to meet the formal entry requirements for the occupationally directed education and training programmes, which include holding an NQF Level 4 qualification or the equivalent of a National Senior Certificate (Grade 12).
- **Professional Experience:** Participants were required to possess prior working experience in the field of Education, Training and Development (ETD) to gain entry into the respective learning programmes.
- **Programme Completion:** To be included in the research, participants must have successfully completed an occupationally directed education and training programme facilitated by the host organisation and involved in the research.

The individuals who qualify under all of the criteria above were formally invited to participate in the research.

Participants were excluded from the study if they fulfilled any of the following circumstances:

- They were not successful in completing the occupationally directed education, training, and development programme.
- They had not completed a National Senior Certificate (Grade 12) or equivalent NQF Level 4 qualification.
- They had no prior work experience in Education, Training and Development.

4.3.2 Target Population

The target population for this study was adult learners who had completed either the National Certificate or the National Diploma in Occupationally Directed Education, Training and Development Practices at a selected education and training development consultancy. The organisation was selected purposively based on its known history of

delivering accredited qualifications in the post-school education and training sector and its past relationship with the researcher.

In order to allow for participant accessibility, the organisation hired a gatekeeper who had the role of contacting potential participants, informing them about the study, and obtaining informed consent. The gatekeeper was responsible for ethically managing participants' contact information and advised participants that their details would not be used without their consent, that participation in this study was provided voluntarily and would satisfy the institutional guidelines.

The sample comprised learners who entered the qualifications through Recognition of Prior Learning (RPL) processes. Participants had either taken the 120-credit National Certificate or had extended their studies to complete the full 240-credit National Diploma. Since the two qualification types shared an initial 120 credits, learners across both qualification groups were exposed to common training modules with identical exit-level outcomes for their year of study. The sampling frame for the data collection was every individual who had completed either of the two qualifications from 2009 onwards. This cohort was contacted, and 15 participants formed the sample size for the study.

4.4 DATA COLLECTION

In this study, the data collection method used was individual interviews. Creswell *et al.* (2019) stated that qualitative interviewing encourages a dialogic interaction between the researcher and participant. This provides an opportunity for the researcher to collect in-depth details about the participant's lived experience and perspective. The two-way interaction provides a more grounded view of the phenomenon being studied, as participants elaborate on thoughts and experiences. The intended outcome is to obtain rich descriptive words and phrases to draw out how the participant's knowledge and lived experience contribute to answering the research questions and body of knowledge.

In this study, online interviews were conducted with participants using the Microsoft Teams (developed by Microsoft Corporation) software application. Interview questions

were structured and developed in advance. The pace of the interviews was managed by the interviewer, and the questions were asked in a standardised manner. This means that all participants were asked the same questions and in the same sequence. Probing of responses was included in the interview, in instances that required clarity of responses or further information (Creswell *et al.*, 2019). In keeping with ethical protocol, the semi-structured interviews were recorded once permission was provided by the study participants. The interviews were transcribed using Microsoft Teams, and the transcripts were saved on a password-protected file. These were only accessible to the supervisor and researcher..

4.5 DATA ANALYSIS

This study used thematic analyses to make sense of the collected data. The researcher used the NVivo 12 software to help organise, code and analyse the data in a structured way. This allowed the researcher to identify suitable patterns and themes in relation to Knowles' (1975) principles of adult learning. This further informed the conceptual framework recommended in this study.

The thematic analyses were guided by Braun and Clark's (2006) framework for qualitative data analysis. First, the collected data were transcribed verbatim. It was then uploaded to the NVivo 12 software, where the researcher then read and re-read the transcripts to gain familiarity. In this case, an inductive approach was employed to help the researcher identify meaningful pieces of data that aligned with the study's research objectives and questions (Merriam & Grenier, 2019). Although an inductive approach was initially used to identify patterns and themes emerging from the data, the findings were later interpreted in relation to Knowles' (1975) principles of adult learning to strengthen theoretical alignment.

Next, labels were assigned to chunks of meaningful data, which are referred to as codes. Codes are basically short descriptions which capture the main ideas of the collected data. In this study, codes were identified by the common ideas emanating from the participants' viewpoints relating to the barriers of adult learning. Thereafter, codes were grouped into categories aligned with Knowles' (1975) principles of adult learners, namely:

- Self-directedness

- Accumulated experience
- Readiness to learn
- Orientation to learning
- Motivation to learn
- Need to know

This stage of the analysis reflected a deductive and theory-driven interpretation process, whereby the emerging themes were organised according to the theoretical framework underpinning the study. This analytic approach ensured the data's patterning could be meaningfully aligned with the adult learning theory that underpinned the study.

To identify and refine themes, the researchers continuously compared coded data with new data. This allowed the researcher to accurately capture the participants' experiences of the barriers to adult learning in their specific study programmes. The analyses progressed until data saturation, at which point no new ideas or themes emerged from the interviews (Merriam & Grenier, 2019). Here, the analyses moved from inductive to deductive coding, in which the researcher compared the identified themes to the conceptual framework and applied it to address the study's research questions. Codes with similar meanings were grouped into broader categories and themes based on recurring patterns identified across participant responses. These themes were then reviewed and refined to ensure alignment with the study objectives and theoretical framework.

Furthermore, the reliability of the thematic analysis was enhanced through the continuous application of NVivo's query features, such as the memo function. These tools allowed for reflective commentary throughout the analysis process (Lethbridge, Sim & Singer, 2005). Hence, the data analyses were performed systematically and transparently, in alignment with best methodological practices for a qualitative study. The researcher also remained reflexive throughout the study by continuously reflecting on personal assumptions, interpretations, and potential biases during data collection and analysis to enhance the credibility and trustworthiness of the findings.

4.6. TRUSTWORTHINESS

When collecting and analysing data, it is important to ensure the trustworthiness of the collection process. It is imperative to ensure that the methods used to interpret qualitative research are accurate and reliable. This provides credibility and support to the study's findings. For example, Creswell et al. (2019) stated that interviews are a viable method for exploring participants' lived experiences and producing thick, rich, and descriptive data, provided the integrity and rigour of the data collection process are maintained. Trustworthiness isn't an after-the-fact undertaking; it should occur throughout data collection and analysis (Merriam & Grenier, 2019).

Credibility, transferability, dependability, and confirmability determine trustworthiness of a qualitative study (Creswell *et al.*, 2019), as observed below:

4.6.1 Credibility

The research questions for this study aim to align with the study's aims and topic. The participants in the study were selected based on meeting a criterion that made them suitable for the study. Debriefing sessions with the supervisor of this study assisted in ensuring that credibility was maintained by sounding out the data collected, in relation to the analysis of the data (Creswell *et al.*, 2019).

4.6.2 Transferability

The results of the data analysis are relevant only to the target population and are not generalised to the broader population of adult learners. Connections within the components of this study can, however, be identified and used by readers to inform their own experiences and research. Qualitative researchers can consider how typical the study participants are within a particular context and the contexts to which the study's findings apply. This can serve as a basis for researchers to use the research documents to understand the complete picture of the research study and determine whether the research findings can be transferred to their environment. Transferability is possible where the research is provided with a comprehensive and purposeful account of the context, participants and research design. The interrelatedness between the revealed data and the behaviours and practices of other communities can be established through a process of transferability (Creswell *et al.*, 2019).

4.6.3 Dependability

Dependability is confirmed through the implementation of the research design. The data collection method and the analysis and summarisation of the data allow for reflection on the research project throughout the different stages of implementation. This allows changes to be made as the research process unfolds. Documenting revisions provides a basis for understanding how and why certain decisions were made regarding data analysis and interpretation (Creswell *et al.*, 2019).

4.6.4 Confirmability

Confirmability refers to the degree of neutrality, or the extent to which the research findings are shaped by participants rather than by the researchers' bias. This suggests that the study's confirmability increases as the effects of researcher bias are reduced. Confirmability is achieved when the analysed data are interpreted based on participants' perceptions rather than the researcher's opinion. This trail allows observers to review how the research was conducted. In this way, issues concerning data bias is eliminated (Creswell *et al.*, 2019).

4.7 ETHICAL CONSIDERATIONS

Ethical considerations include protecting participants' rights, obtaining informed consent, and the institutional review process for ethical approval. The protection of the respondents' human rights entails the right to privacy, the right to self-determination, the right to fair treatment, the right to autonomy and confidentiality, the right to protection from discomfort and harm, as well as the right to be treated in good faith by being informed of all relevant information. Written permission was requested and obtained from one of the organisation's senior managers before the commencement of this study. This research proposal was approved by the UNISA Department of Human Resource Management prior to the commencement of this study (Klopper, 2008).

The informed consent letter explained the purpose of the research, and participants responded voluntarily and anonymously to protect their identities. The participants were selected on the basis of their completion of an occupation-directed education and training programme with the training and development consulting company.

Participants were not expected to provide any form of identification and could choose to remain anonymous to protect their identity. The collected data was kept safe and not given to any unauthorised individuals. Approval to conduct the research was required from the individuals and entities involved in the study. Furthermore, the research process was conducted in accordance with the University of South Africa's (UNISA) ethics policy.

4.8 CONCLUSION

This chapter presented the research methodology used to explore the barriers to adult learning. This study adopted a qualitative research design, which enabled a thorough investigation of the experiences of adult learners currently engaged in occupationally directed training programmes. The primary data collection method was semi-structured interviews, which yielded rich narratives and enabled meaningful findings. The study's sampling criteria are highlighted, demonstrating that only the most appropriate participants were selected. In addition, this chapter provided a detailed description of the research ethics, including informed consent, voluntary participation, and confidentiality. The six-phase data analysis guidelines were also presented to illustrate thematic coding in NVivo 12. The validity of the study is also presented to ensure trustworthiness, including credibility, transferability, dependability and confirmability.

The next chapter presents the findings of the study.

CHAPTER 5: RESEARCH FINDINGS

5.1 INTRODUCTION

This chapter presents the key findings from the analysis of participant interviews. The findings are structured according to the major themes identified during the study. The themes, codes, and subcodes are derived from participants' responses and aligned with the research questions guiding this study. The findings are supported by direct quotations from the participants to ensure authenticity. To maintain anonymity, each participant is referred to as "Participant" followed by their respective number.

Based on the responses of all participants to the interview questions outlined in Appendix 3, the study identified key themes, codes, and subcodes that emerged from the data analysis. The interview questions were designed to align with and support the following research questions:

RQ3. What are the barriers to adult learning which are experienced?

RQ4. What is the relationship between the barriers to learning experienced by the learning programme participants and the principles of adult learning formulated by Knowles (1975)?

The themes presented in this chapter are discussed in relation to the relevant research questions and Knowles' (1975) principles of adult learning. The findings presented in this chapter are organised according to the analytical domains developed from Knowles' (1975) principles of adult learning, which served as the conceptual framework for interpreting participants' experiences. While the domains provided a deductive organisational structure for the analysis, the themes and sub-themes emerged iteratively from participants' narratives during the thematic analysis process. The findings, therefore, reflect both theoretically informed interpretation and the lived experiences of ETDP participants within workplace-based learning environments. Participant quotations are included to support transparency and demonstrate the relationship between the empirical data, coding categories, and the final thematic interpretation.

5.2 PROFILE OF PARTICIPANTS

The study included participants who completed the ODETD qualification with an accredited skills development provider. Demographic and biographical information was not collected, as the study focused primarily on the participants' lived experiences and perceived barriers to adult learning rather than on comparative demographic analysis. The exclusion of biographical data also helped maintain participant anonymity and confidentiality during the research process.

5.3 OVERVIEW OF THEMES AND SUB-THEMES

Themes were developed through an iterative thematic analysis, supported by NVivo 12. Initially, open coding was applied to identify meaningful units of data related to participants' experiences of barriers to adult learning. Similar codes were grouped into preliminary categories, whereafter relationships and conceptual similarities between categories were examined to develop broader themes and sub-themes. Refinement involved repeated comparisons between the original transcripts, codes and emerging thematic patterns to ensure coherence, consistency, and alignment with the study objectives. While the conceptual domains were deductively informed by Knowles' (1975) principles of adult learning, the themes emerged inductively through participants' narratives of their experiences.

The study identified five key themes and 14 sub-themes, as shown in Table 5.1 below. These encapsulate the experiences of adult learners, highlighting both the challenges and positive aspects of their learning journey. These themes provide insights into the factors influencing their engagement, motivation, and overall learning process.

Table 5. 1: Themes, Sub-themes, and Research Question Alignment

	Theme	Sub-themes	Research Question
1	The Learning Experience of Adult Learners	<ul style="list-style-type: none">• Positive Experiences• Negative Experiences	<ul style="list-style-type: none">• RQ4
2	Barriers to adult learning	<ul style="list-style-type: none">• Environmental Barriers• Intrapersonal Barriers	<ul style="list-style-type: none">• RQ3

		<ul style="list-style-type: none"> • Personal Barriers 	
3	Positive Aspects of Adult learning	<ul style="list-style-type: none"> • Self-directed learning • Readiness to learn • Prior Experience • Immediate Application • Collaborative Learning 	<ul style="list-style-type: none"> • RQ4
4	The motivations for pursuing adult learning	<ul style="list-style-type: none"> • Intrinsic Motivation • Extrinsic Motivation 	<ul style="list-style-type: none"> • RQ4
5	Real-time facilitation of the learning process	<ul style="list-style-type: none"> • Facilitator Support • Peer Support 	<ul style="list-style-type: none"> • RQ4

As shown in Table 5.1, each identified theme aligns with specific sub-themes and research questions.

The first theme, *The Learning Experience of Adult Learners*, explores both positive and negative experiences encountered during the program. Participants reported a strong sense of personal fulfilment and professional growth, with the skills they acquired enhancing their confidence and career prospects. However, some participants encountered challenges balancing their academic commitments with work and family responsibilities, especially single parents who faced additional pressures due to limited support structures.

The second theme, *Barriers to Adult Learning*, highlights the structural, psychological, and personal challenges that affected participants' progress. Environmental challenges included a lack of institutional support, strict work schedules, and inadequate employer accommodations, such as study leave. In addition, participants pointed to intrapersonal barriers such as mental fatigue, feelings of self-doubt, and a perceived lack of work experience, which made some learners hesitant to engage in class discussions. Personal barriers included limited family and community support, and challenges with time management and self-regulated learning.

The third theme, *Positive Aspects of Adult Learning*, underscores the key factors that contributed to an enriching learning experience. Many participants valued the program's flexibility and self-directed nature. This enabled them to manage their academic, work, and personal responsibilities more effectively. Participants indicated that their readiness to learn was shaped by the relevance of the course material and

the timing of learning relative to their professional development. In addition, collaborative learning, especially the peer support and knowledge sharing, played an important part in enhancing their learning experiences.

The fourth theme, *Motivations for Pursuing Adult Learning*, highlights the reasons participants enrolled in the program. A desire towards self-improvement, upskilling, and a passion for lifelong learning were part of the intrinsic motivation displayed by participants. On the other hand, extrinsic motivation, which influenced participants' decision to pursue further education, included employer requirements, opportunities for career growth, and job security.

The final theme, *Real-Time Facilitation of the Learning Process*, highlights the important roles of facilitators and peer networks in supporting adult learners. Facilitator support was particularly highlighted as instrumental to providing the necessary guidance, motivation, and clarity. This was an important factor as participants found it enabled them to navigate challenges throughout the course. In addition, peer collaboration created an environment which significantly enhanced shared learning and emotional support. This allowed participants to overcome challenges and remain motivated throughout the qualification. Table 5.1 above presents the overarching themes and sub-themes identified from the data analysis process. The themes represent the broader patterns identified across participant responses, while the sub-themes reflect more specific categories within each theme. Thereafter, Table 5.2 below provides a more detailed presentation of the codes and subcodes derived from participants' responses during the thematic analysis. This structure demonstrates the progression from broader thematic categories to detailed interpretive coding.

In this study, domains refer to the broad analytical categories derived from the conceptual framework and Knowles' (1975) principles of adult learning. Themes represent recurring patterns identified across participant experiences, while sub-themes capture more specific dimensions within each theme. Coding categories were developed during the initial stages of analysis and were subsequently refined into broader themes through thematic interpretation.

The five themes and sub-themes are discussed in the next sections.

5.3.1 THEME 1: THE LEARNING EXPERIENCE OF ADULT LEARNERS

This theme highlighted both the positive and negative experiences of the participants. Table 5.2 provides a detailed illustration of the codes and sub-codes identified under Theme 1.

Table 5. 2: Theme 1 -The Learning Experience of Adult Learners

Theme 1	Codes	Sub-codes
The Learning Experience of Adult Learners	Positive Experiences	<ul style="list-style-type: none"> • Personal fulfilment in engaging with the program. • The skills being taught are perceived as a professional advantage.
	Negative Experiences	<ul style="list-style-type: none"> • Balancing study with other life obligations • Lack of social support (single parents). • Additional pressure to perform in constrained contexts

Source: Researcher's own creation

As indicated in Table 5.2, in theme one – The learning experience of adult learners- two codes, each with sub-codes, were identified. Code one was Positive experiences, with sub-codes personal fulfilment in engaging with the programme, and the skills being taught are perceived as a professional advantage. Code two was Negative experiences, with sub-codes Balancing study with other life obligations; lack of support (single parents), and additional pressure to perform in constrained contexts.

Most participants (7 out of 10) reported positive experiences, particularly highlighting personal fulfilment and professional skill development through the program. Regarding positive learning experiences, one participant reported a sense of personal fulfilment upon completing the qualification. The participants perceived the skills learned as professionally advantageous to their jobs and careers.

Participant 1: *“The coaching and feedback module was certainly beneficial, and the general learning was positive.*

Participant 3: *“My priority was to improve my own skills and to further strengthen my own knowledge to get some sort of certification so that I can become more competitive in the job market. More so, I had bits and pieces of knowledge and experience here and there, but having gone through the qualification and the learning, you know, it just made me more aware of how much more I could be doing.”*

One of the participants expressed a sense of value in the application of the theory taught in the qualification. The participant believed that applying this theory in the workplace led to a better understanding of the course materials and helped them perform their job more effectively. They indicated that applying the theory deepened their understanding of what they were learning, and when they felt better equipped to apply their skills, they could see the value of the qualification. The participant found the qualification more enjoyable and engaging when they could integrate the program's theoretical and practical components and apply what they had learned.

Participant 4: *“We created a contextual opportunity to be able to go and practice what is learnt. It did help me understand what I was doing, so it gave me the confidence that I understood the compliance behind certain things and that I understood the right and the wrong way and where there were sort of grey areas within ETD versus just you know acquiring informal experience because someone else taught you how to do something, you now really got yourself qualified.”*

Participant 9: *“So a lot of information, but also, I can see how you can apply practically within the field of training and development.”*

Two participants indicated that they gained new information that helped them better understand the tasks in their jobs.

Participant 7: *“I was also able to learn more about whatever stood out for me as something of interest, something that was misunderstood. It actually led you to explore a lot more into being able to find information that satisfied your curiosity. In addition, I was working in the environment of adult education, and it was easy for me to adapt to what was going on.”*

Participant 8: *“You have a better understanding, especially when you've worked in a specific environment, it's a lot easier to grasp things. And for me, it's 100 times meaningful because we are absorbing what basically is relevant and what we need to absorb rather than being forced.”*

Whilst the previous sentiments highlighted positive experiences, at least half of the participants (5 out of 10) reported negative experiences with balancing study and life obligations. This is particularly true for single parents, who find themselves in constrained situations and face additional pressure.

Participant 6: *“So, I think the extra workload for the occupational type of qualification created a barrier in itself.”*

Participant 7: *“I did have **several** challenges because I was working full-time as well at the time.” “My initial program was nine months but was actually extended to almost two years because I did not get through everything that I needed to get through in the original time span.”*

Participant 8: *“I feel that it should have been broken down into two sessions on weekdays, so we had a weekend to actually do the work because I found what was happening with me is that I worked full days like 8 to 5 and then I had to cram in time on certain evenings.”*

5.3.1.1 CRITICAL INTERPRETIVE DISCUSSION ON THEME 1

The findings in this theme are consistent with existing literature on adult education, particularly the principles of andragogy, which emphasise the significance of practical knowledge application in learning (Knowles, 1975). Participants in the program reported individual satisfaction and career benefits, which corresponds with research indicating that adult learners seek purposeful education to enhance job skills and advance their careers. A notable distinction from previous studies is the added stress experienced by single parents and individuals managing multiple responsibilities, an aspect often overlooked in conventional adult learning frameworks.

The findings of this study also suggest that adult students face unique issues compared to traditional school leavers, primarily because they manage multiple life roles and other responsibilities. It is thus appropriate to ask: Should mature students be supported in university or college programs the same way recent school graduates are? The literature suggests they should not be supported similarly, given the barriers experienced by the study's participants, such as a lack of institutional flexibility, insufficient time for studies, and insufficient social support systems. Burns (2020) further emphasises the necessity of more flexible and learner-centred approaches to education that consider an individual's personal and professional obligations. Therefore, support systems in adult learning programs should provide flexible schedules, workplace accommodations, and psychosocial support to address the needs of older adults. This research adds value to this conversation and reinforces the urgent need for a response from the educational structure that can support the adult learner and be more than just traditional educational models.

Knowles (1975) acknowledged the role of prior experiences in the learning process,

but his principles don't fully cover how other obligations may limit participation and lead to low completion rates for adult learners. This study contributes to the literature by underscoring the importance of various external support systems,

such as employer flexibility and childcare assistance, in enhancing adult learning experiences.

5.3.2 THEME 2: BARRIERS TO ADULT LEARNING

This theme explores the various challenges that hindered participants' educational experiences, categorised into environmental barriers (lack of institutional support and workplace accommodations), intrapersonal barriers (mental fatigue, self-doubt, and difficulties in team dynamics), and personal barriers (lack of familial or community support, time management struggles, and self-regulation difficulties). Table 5.3 illustrates this theme.

Table 5. 3: Theme 2 - Barriers to adult learning

Theme 2	Codes	Sub-codes
Barriers to adult learning	Environmental Barriers	<ul style="list-style-type: none"> • Lack of institutional support, including the absence of flexible work schedules. • Lack of accommodation in employee benefits for occupationally directed participation.
	Intrapersonal Barriers	<ul style="list-style-type: none"> • Mental fatigue trying to balance their obligations to their studies, careers, and personal lives. • Lack of Experience and Self-Belief: Some learners detached themselves from group learning activities because they felt too inexperienced to contribute and had a lack of self-belief. They believed that others were more knowledgeable than they were. • Participants faced self-confidence issues and difficulties in adapting to team dynamics, limiting their ability to benefit from collaborative learning. • Self-Regulation: Making personal changes to take charge of their

		own learning without any outside help.
	Personal Barriers	<ul style="list-style-type: none"> • The hardships of learning were increased by a lack of support from family or community. • Planning and Time Management: Difficulty in managing time for completing coursework and in planning or implementing study plans

Source: Researcher's own creation

The findings under this theme reveal three major barriers that affected participants' learning experiences: environmental, intrapersonal, and personal. These barriers, supported by participant quotations, provide insight into the challenges adult learners face and their implications for successful programme completion.

Many participants (7 out of 10) highlighted the lack of institutional support and accommodation as significant barriers to their learning. The lack of institutional support, particularly inflexible work schedules and inadequate accommodations, such as study leave for occupational learning programs, made it challenging for participants to manage their time effectively between professional obligations and academic commitments. While the occupational nature of the qualification required significant time for tasks like assessments and practical work, participants reported that their employers did not provide the necessary flexibility to support their learning needs. This means that employers need to recognise that several different forms of employer support can be provided to employees engaging in skills development Initiatives rather than just providing financial assistance.

To enable employers to help their employees balance their work and study commitments, employers can allow employees to include study time within their working hours, or to have a formal study leave when completing an assessment (for example, exams) for an occupationally based learning programme. The findings highlight a significant gap between the aims of occupational training programmes and the current workplace reality.

As one participant noted, her employer told her that, because the qualification was occupationally based and did not require students to sit an exam, she could not take a period of study leave. She, however, pointed out that although she was not required to sit an exam, she still had to spend considerable time undertaking assessments. The lack of these resources and support placed significant pressure on learners, who were forced to balance their demanding work schedules with their academic endeavours. Moreover, the employer's sentiments suggest limited awareness of the importance of occupational qualifications within South Africa's skills development framework. To effectively facilitate access to development opportunities and promote the country's economic advancement, employers must actively support all types of qualifications.

The absence of flexible work schedules was a significant barrier. Participants struggled to balance their professional commitments with the program's demands.

Participant 6: *“Because it was an occupational qualification, it wasn't necessarily given the same support as an academic qualification, so I think that in itself could definitely be a barrier to learning.”*

The lack of accommodations, such as study leave and funding, compounded the difficulty of completing the program.

Participant 6: *“Because it was an occupational qualification, it wasn't necessarily given the same support then an academic qualification would have had, where you go and sit down, write an exam, get that day off, get the day before or whatever.”*

These barriers placed significant pressure on participants, forcing them to manage heavy workloads alongside academic requirements.

Several intrapersonal barriers were also raised by the participants. More than half (6 out of 10) reported challenges such as mental fatigue, lack of self-belief, and difficulties in team dynamics. The ongoing balancing of personal life, working life and academic

studies caused mental fatigue, and this was identified as a barrier to adult learning. Some participants indicated that mental fatigue often led to decreased engagement on their part during class discussions and lessons. In addition, one participant indicated that some of their fellow learners had more years of prior experience, which caused the rest of the group to move too quickly for them during class discussions and lessons. The participant noted that their peers grasped concepts faster than they did, which made them feel less experienced in contributing during lessons and led to a lack of self-belief.

Balancing personal, professional, and academic responsibilities led to exhaustion and reduced engagement, leading to mental fatigue.

Participant 7: *“Mental fatigue played a big role in the completion of the training.”*

Participant 8: *“I feel that it should have been broken down into two sessions on weekdays, so we had a weekend to actually do the work because I found what was happening with me is that I worked full days like 8 to 5 and then I had to cram in time on certain evenings.”*

The lack of experience and self-belief was also indicated as a barrier. Some participants detached themselves from group learning activities because they felt too inexperienced to contribute and lacked self-belief. They believed that others were more knowledgeable than they were. A participant indicated that team members had more years of experience, which meant the rest of the group moved too fast for them during class discussions. The participant indicated that their peers grasped concepts more quickly than they did. This made the participant feel less self-directed, as they felt their peers were less patient with them during class.

Participant 4: *“Some of them had way more experience within the field itself of learning and development. I think the barrier was just around how they grasped concepts potentially faster than me. If 80% of your group gets the task or concept much faster, it can make the rest of the group feel like OK, you're just not getting*

it, and it sort of forces the whole group to move on much faster than what you can grapple with, so that for me was a barrier.”

These intrapersonal barriers hindered participants' ability to fully engage with the program, contributing to feelings of isolation and disengagement. The findings indicate that many participants experience intrapersonal challenges, including self-doubt, mental fatigue, and low confidence, which suggests that self-directed learning does not come naturally to all adult learners.

While Knowles (1975) identified self-direction as a fundamental principle of adult education, he emphasised the need for supportive, psychologically safe environments to fully develop this capability. The study highlights that self-direction is influenced by factors such as prior learning experiences, emotional support, and facilitators' behaviour. Boyadjieva and Ilieva-Trichkova (2021) note that learners are more successful when they feel empowered and genuinely respected. Therefore, it is essential to actively promote self-directed learning through empathetic, inclusive facilitation and educational environments that encourage participation without fear of criticism.

A significant number (8 out of 10) emphasised personal challenges, including the absence of familial support, struggles with time management, and the need for self-regulation to succeed independently. Personal circumstances were identified as the third set of barriers and emerged as a significant obstacle in most of the participants' learning journey, as it contributes to an adult learner's willingness to learn. It demonstrated the extent to which their learning experiences were influenced by the absence of external support and personal time management challenges. Although collaborative learning is valuable, it presents its own challenges for participants.

Many participants battled with self-confidence. This made them hesitant to engage in class or group discussions. Even when they wanted to contribute to teamwork, their low confidence led them to believe they lacked the necessary knowledge and experience to engage fruitfully. This suggests that their ability to fully benefit from a collaborative learning environment was limited by a lack of self-confidence. Additionally, trying to adapt to and manage group activities proved challenging due to

diverse opinions and scheduling. This posed additional barriers to effective group efforts.

Many participants were faced with external factors, such as family responsibilities, that made it difficult to overcome. Commitments around caregiving or full-time work often limited their ability to engage fully and productively in group activities as they battled to manage their time. Moreover, participants without family or community support experienced additional strain, making it difficult to balance the nature of collaborative learning with their other commitments.

It can therefore be inferred that the pressure of handling multiple responsibilities can be lessened by the assistance and support of extended family and friends. However, this study found that family support was insufficient, which contributed to participants struggling with time management to complete their academic tasks. Therefore, many adult learners had to bear the burden of their academic commitments independently. This intensified the personal barriers they faced. Caregiving responsibilities and full-time work made it challenging for participants to balance academic tasks with their other obligations. The challenges with time management suggest that many may not have anticipated the programme's demands or received sufficient support from family or supervisors.

This underscores the ongoing necessity for clearer orientation from the programme providers. An introductory session should outline time commitments and associated workloads, particularly for group activities, and provide guidance on effective planning strategies for learners. Additionally, programme providers should consider whether their expectations align with the realities of employed adults, who often juggle multiple responsibilities. Offering flexible options and proactive communication may better align the program with students' lives, thereby enhancing both engagement and success.

Participant 7: *“As I am working full-time, it was very difficult to complete all my assignments. The only available time was the weekends.”*

The absence of external support systems placed additional strain on participants, compelling them to independently manage their academic workload without assistance from family or the community.

Participant 3: *“I was unemployed during that time, and I was not able to get access to information or data that I needed.”*

Participant 4: *“There was no support at home, and this made it even more difficult to do collaborative learning alongside other commitments.”*

These findings indicated that, for learners to succeed, learning programs must be adaptable and tailored to their individual needs. This includes finding ways to make it easier for them to balance work, family life and learning. Furthermore, learning institutions should find creative ways to assist those learners who don't have direct access to a workplace. Here, to complete the qualification, institutions should form partnerships with stakeholders willing to take on students to provide workplace experience. By addressing these barriers, institutions can create an inclusive and supportive environment for adult learners.

5.3.2.1 Critical Interpretive Discussion on Theme 2

Many of the ecological barriers to adult learning identified in this research are consistent with those reported in other studies. The Department of Higher Education and Training (2019), for example, states that an additional barrier to workplace learning in South Africa is that it is often constrained by institutional limitations and the rigidity of working conditions. The ecological barriers identified by participants in this study reflect the same types of limitations; they also describe the same kinds of intrapersonal barriers to adult learning, such as fatigue and a lack of self-confidence, which are reflective of the psychological constraints Merriam and Grenier (2019) discuss.

Also, many participants identified a lack of support from family or community, further emphasising the need for a support system that will facilitate the adult learner across all aspects of their education. In addition, this study showed that the challenges

relating to self-confidence and team dynamics may be a hindrance to collaborative learning. As such, this study builds on the concept of self-directed learning developed by Knowles (1975); it demonstrates how self-determined learning can be inhibited by uncertainty and imbalance within groups. This understanding is critical since collaboration is generally seen as beneficial for encouraging peers to help one another, developing solutions collectively, and increasing overall engagement. However, it assumes that students are equipped to collaborate effectively.

This analysis challenges that assumption, revealing that many adult learners may not be adequately prepared for the relational dynamics required in team-based learning. To address this gap, the programme provider should consider providing a structured introduction to group learning, outlining objectives, expected behaviours, and strategies for managing group interactions. Proper preparation can empower students to build their skills and contribute meaningfully to discussions.

5.3.3 THEME 3: POSITIVE ASPECTS OF ADULT LEARNING

This theme, as shown in Table 5.4 highlights the factors that enhanced participants' learning experiences, including flexibility and self-directed learning (control over learning schedules and proactive engagement), readiness to learn (relevance and timing of learning in relation to professional and personal growth), prior experience (integration of previous knowledge with new concepts), immediate application (applying learning to workplace tasks), and collaborative learning (peer support and information sharing).

Table 5. 4: Theme 3 - Positive aspects of adult learning

Theme 3	Codes	Sub-codes
	Flexibility of the program was recognised, as supporting learner empowerment	<ul style="list-style-type: none"> • Learner control over when to complete which learning activities was identified. • Learners could manage their own schedule.

Positive Aspects of Adult learning	Self-directed learning	<ul style="list-style-type: none"> • Learner’s self-agency to approach the facilitator about changing groups, demonstrated proactive learner behaviour, toward their learning experience.
	Readiness to learn	<ul style="list-style-type: none"> • Relevance of learning • Timing of when learning takes place in relation to professional role and personal growth.
	Prior Experience	<ul style="list-style-type: none"> • Integrating new and old knowledge.
	Immediate Application	<ul style="list-style-type: none"> • Learners’ relevance of learning to enhance tasks within their jobs.
	Collaborative Learning	<ul style="list-style-type: none"> • Information sharing provided a means of support to learners as they completed their learning.

Source: Researcher’s own creation

Participants identified some positive elements of their learning experience: flexible learning schedules, goal-oriented learning, and practical learning. Each concept importantly shaped the participants’ views of the program and their ability to succeed as adult learners.

Two-thirds of participants (6 out of 10) appreciated the program’s flexibility, allowing them to manage their schedules and control their learning pace. These participants identified the programme’s flexibility as a major advantage, enabling them to fit their learning around their personal and professional commitments. Flexible learning empowered participants to control when, where, and how they engaged with the learning activities, while adjusting their learning to their specific circumstances. Some learners liked pacing their learning activities with work and family life, which made the programme easier to complete.

Participant 4: *“It was flexible in that way, and I think if people required it, they were dealt with on a one-on-one basis.”*

Participant 7: *“Being an adult learner... as much as there is a layout or curriculum... it is open enough for me to explore different options in learning as well.”*

Participant 8: *“It made me feel, as an adult, that we have a choice. We choose what we actually want to inhale, for lack of a better word, with regard to studying”.*

These reflections demonstrate how flexibility enabled learners to adapt their studies to personal and professional demands, fostering greater engagement and control over the learning process.

A smaller group (4 out of 10) demonstrated self-agency by taking proactive steps, such as approaching facilitators to improve their learning environment. These participants demonstrated proactive behaviour in shaping their learning experiences, showcasing self-agency in identifying and resolving challenges.

Participant 6: *“I just went to my professor the first time, and I said to him, I'm changing groups... I can't work with these guys; they're not taking their studies seriously.”*

The ability to seek alternative group arrangements highlights participants' determination to create an environment conducive to their learning goals. By proactively seeking a solution, requesting a change of group participants demonstrated characteristics of self-directed learning, which include identifying a barrier and seeking a solution

Almost all participants (8 out of 10) emphasised the direct relevance of learning in enhancing their workplace tasks and professional roles. This reflects the principle that adults are ready and motivated to learn when they see clear connections between the material and their current or future responsibilities.

Participant 2: *“A lot of the modules spoke to what I was doing at the time... it gave me new approaches on how to manage certain aspects.”*

Participant 7: *“I’m involved in a lot of skills development and customer relationship management work now, and a lot of it sits inside of the development from the learning that we’re doing.”*

These insights illustrate how the programme's relevance to participants' professional contexts enhanced their engagement and perceived value of the learning. The majority (7 out of 10) highlighted the relevance and timing of the learning as critical factors in aligning the program with their professional and personal growth. Participants indicated that the timing of the program was critical to their readiness to engage, aligning with their professional and personal growth trajectories.

Participant 9: *“The timing for me is appropriate... the right time for myself.”*

Participant 10: *“The ODETDP came at the right time because it gave me the knowledge and experience I needed to expedite my career in the space.”*

This alignment of timing with participants' goals highlights the significance of offering adult learning opportunities at critical moments in learners' professional development. To effectively leverage participants' readiness to learn and their personal motivations, program structures should focus on intrinsic drivers by providing real-world relevance and learner-centred approaches.

Participants described how the programme allowed them to connect prior experiences with new learning, enriching their understanding and application of knowledge.

Participant 1: *“It certainly added value... you could relate concepts to your work experience... and learn from the group as well.”*

Participant 3: *“Now I had a better understanding of the assessment principles and the origins and the purpose behind it.”*

Significantly, half of the participants (5 out of 10) noted that peer information sharing provided valuable support throughout their learning process. This allowed them to

complete activities better. Participant 1 highlighted the value of collaborative learning, noting that group interactions enabled them to connect new concepts to their existing work experience and gain insights from peers across diverse industries. This collaborative approach enhanced their understanding, demonstrating the importance of group learning as a platform for knowledge exchange and shared learning. More so, participants valued the programme's practical focus, which enabled them to immediately apply their learning to workplace tasks.

Participant 9: *"I can see how you can apply [the knowledge] practically within the field of training and development."*

Participant 10: *"With my quality assurance hat... I can look at quality assurance for assessment, moderation, and facilitation."*

The ability to bridge theory and practice underscores the programme's relevance, making learning meaningful and impactful for participants' professional roles, and further supporting the importance of occupational learning in South Africa's broader skills development landscape.

5.3.3.1 Critical Interpretive Discussion on Theme 3

This finding aligns closely with Knowles' (1975) principles of self-directed learning, emphasising adaptability, motivation to learn, and the integration of experience. Participants highlighted the importance of flexible scheduling, supported by the notion that autonomy significantly contributes to the success of adult education (Loeng, 2020). Additionally, collaborative learning and information sharing emerged as crucial elements for enhancing the learning experience, reflecting social learning theories that suggest peer interactions can improve knowledge retention. A notable contribution of this study is the examination of learner agency, in which many participants exhibited proactive behaviours to shape their educational environments, such as transitioning between groups as needed. Self-direction is a well-recognised component of adult education, often linked to a learner's self-concept and their growing autonomy, as articulated by Knowles. However, this study underscores that institutional flexibility is essential in facilitating this agency, framing it as a shared responsibility between the learner and the learning institution

5.3.4 THEME 4: THE MOTIVATIONS FOR PURSUING ADULT LEARNING

Table 5.5 below shows the reasons why participants enrol in adult learning programmes. This can be categorised into intrinsic and extrinsic motivational factors. Intrinsic motivation refers to skill development, self-improvement, and a desire for lifelong learning. Extrinsic motivation included factors such as career development and advancement, meeting employer requirements, and the competitiveness of the job market.

Table 5. 5: Theme 4 -The motivations for pursuing adult learning

Theme 4	Codes	Sub-codes
<p>The motivations for pursuing adult learning</p>	<p>Intrinsic Motivation</p>	<ul style="list-style-type: none"> • Self-improvement: Learners embarked on the course to improve their personal and professional skills. • Lifelong Learning: Participants had a passion for lifelong learning and knowledge acquisition.
	<p>Extrinsic Motivation</p>	<ul style="list-style-type: none"> • External reasons, such as employer requirements or opportunities for growth, influenced their decision to enrol. • Career Advancement: Learners were driven by the potential for promotions or better job opportunities.

Source: Researcher's own creation

Two-thirds of participants (6 out of 10) indicated intrinsic reasons for registering for the program. This included a desire to improve themselves and a passion for learning. Participants wanted to enhance their skills, both personal and professional.

They described this continuing education as a way to continually gain new knowledge and therefore viewed learning as an ongoing activity, not limited by professional responsibilities. The pursuit of continuous education is one of the most important characteristics required for the future of work. It allows them to remain flexible and

take initiative in a constantly changing professional environment. Most participants (seven of nine) cited external motivators for their continued education, such as the need to demonstrate to their employers that they meet certain requirements or the opportunity to advance professionally.

This significantly influenced their decision to enrol on the course. These participants acknowledged that acquiring the qualification could improve their employment prospects, resulting in promotions, salary enhancements, or access to superior opportunities within their field. This underscores the significance of career development opportunities that employers can provide to attract and retain talented employees. By supporting professional growth and acknowledging qualifications that enhance workforce capabilities, organisations can foster a more skilled and committed team.

Participant 3: *“I had bits and pieces of knowledge and experience here and there, but having gone through the qualification and the learnings, you know, it just made me more aware of how much more I could be doing.”*

Participant 5: *“I went through a retrenchment process, and part of the bank's support program was that they allocated certain funds for the affected individuals to go through some further upskilling, so that the affected individuals could become more marketable in the workplace.”*

Participant 10: *“I decided that I'm going to invest in myself.” I was going to pay the difference out of my own pocket to enrol on the learning programme.”*

Participant 11: *“My first priority was to improve my own skills.” “Strengthen my own knowledge and get some sort of certification so that I can become more competitive in the job market.”*

Participant 8: *“My home life was being able to ensure that you were always learning something new or acquiring new knowledge, whether it was formal or informal knowledge.”*

Participant 6: *“We started our own business, so I was very clear on what I was doing and excited about what we were doing,*

especially the people that I was doing it with.” “So, for me there was there was hope.” “There was a very clear purpose.”

Participant 2: *“What occupational qualifications have been done for people who did not have opportunities to study further?”*

5.3.4.1 Critical Interpretive Discussion on Theme 4

The motivators identified in this study, both intrinsic (such as self-improvement and lifelong learning) and extrinsic (such as career advancement and employer expectations), align with existing research on adult learning motivations (Ekoto & Gaikwad, 2015). A significant observation from this study is the focus on retrenchments and employment conditions as contributing factors, particularly relevant in the South African context. The findings suggest a notable shift in internal motivation over time; initially, participants aimed to enhance their careers, but later, they valued knowledge for its own sake. This aligns with research on how adult learning catalyses change (Vanslambrouck et al., 2017). This analysis adds to the literature by emphasising the dynamic nature of adult learning motivations, indicating that these motivations are relatively fluid rather than static, and evolve as learners gain confidence and experience.

5.3.5 THEME 5. REAL-TIME FACILITATION OF THE LEARNING PROCESS

This theme, as shown in Table 5.6, explores the role of facilitator support (guidance, motivation, and structured learning assistance) and peer collaboration (knowledge sharing and emotional support) in enhancing the adult learning experience.

Table 5. 6: Theme 5 - Real-time facilitation of the learning process

Theme 5	Codes	Sub-codes
Real-time facilitation of the learning process	Facilitator Support	<ul style="list-style-type: none"> Participants depended on the facilitator’s role to provide direction and help to navigate their learning difficulties.
	Peer Support	<ul style="list-style-type: none"> Through collaborative learning, peer groups offered emotional support

		as well as practical support to learners.
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Source: Researcher's own creation

Two-thirds of participants (6 out of 10) emphasised the critical role that facilitators played in helping them navigate the learning process. Facilitators provided essential guidance, clarified course content, and offered support whenever learners encountered difficulties. For participants, this real-time assistance was instrumental in keeping them engaged and motivated, particularly when experiencing challenging learning material or periods of self-doubt. Facilitators also served as mentors, offering insights and reassurance that helped participants feel more confident in their abilities to complete the program.

Several of the participants also described the value of peer support, which provided both emotional and practical benefits.

Participant 1: *Reaching out to the facilitator at the time was how I got through that one. It was very interesting because we had a group from very varied industries, and so they had learnt certain concepts that I hadn't heard of at the time, even though I had been in ETD for a while.*

Participant 6: *"The facilitator provided motivation and made sure that we felt like we were not alone in the learning process."*

Participant 7: *The facilitator gave us clear guidance on what was expected. It led you to explore a lot more into being able to find information that satisfied your curiosity. They knew what they were doing, so you could call on anybody at any time to just assist us."*

Participant 8: *"We had a coach and facilitator, and I depended on their input to get through certain challenges. The interaction with peers made the process less isolating and encouraged me to stay on track."*

Participant 9: *"Working with others in the group allowed me to gain new insights... the peer collaboration was a great source of support."*

Participant 4: *"Even though I preferred working alone sometimes, group tasks helped me see different perspectives and approaches."*

Two participants indicated that they shared ideas and asked each other questions, which helped them complete the learning activities more effectively. Another participant indicated that their group came from very varied industries, which allowed them to learn about new concepts and experiences. One participant indicated that having a shared virtual platform for communication allowed them to ask questions, which supported their learning.

Equally important was the emotional and practical support learners received from their peers. Participants observed that collaboration in groups, engagement with peers, and the exchange of experiences substantially enhanced their motivation and facilitated program completion.

Participant 1: *"Reaching out to the facilitator at the time was how I got through that one. It was very interesting because we had a group from very varied industries, and so they had learnt certain concepts that I hadn't heard of at the time, even though I had been in ETD for a while."*

Participant 7: *"I was also able to learn more about whatever stood out for me as something of interest, something that was misunderstood. It actually led you to explore a lot more into being able to find information that satisfied your curiosity." "They knew what they were doing, so you could call on anybody at any time to just assist us".*

Participant 9: *"You were given a coach, and he spoke to me, and he said to me that I'm nearly finished. I don't think you must give up now, and that encouraged me. "It encouraged me to go further because I told him that I'm not in the training field, but I*

want to do training and development. Luckily for us, we had the WhatsApp group, so I could ask questions on the WhatsApp group as well”.

5.3.5.1 Critical Interpretive Discussion on Theme 5

The findings of this study align with previous research, which emphasised the role of facilitators. It underscored the importance of structured interaction between facilitator-students and student-student pairs, which contributes to learning in adult education (Marshall, 2019). When facilitators motivate, clarify and provide practical support to the students, this serves to confirm the argument advanced by Knowles (1975) that adult students learn best in real-life environments, engaged in problem-centred learning situations. In addition, the facilitators' role was perceived as one of support rather than prescriptiveness. This meant guiding the learning process rather than placing the onus of knowledge solely on the learner.

Furthermore, peer support contributed greatly to both the practical and emotional aspects of the learning environment. The literature supports the finding that collaborative learning is a necessary means to engage learners and retain their attention (McCall et al., 2018). This study, therefore, addresses an important gap in the literature by highlighting the role of facilitator intervention in collaborative support methods and its effects on real-time facilitation. Moreover, the findings indicated that peer group interaction accounts for much of the learning on a theoretical basis; however, in practice, it needs to be included or encouraged for the full effects of the adult learning experience to come through.

In addition, the findings regarding self-directedness suggest that adult learners value autonomy and practical relevance in workplace learning environments. However, socio-economic pressures, workload demands, and limited institutional support may constrain learners' ability to engage fully in self-directed learning. The findings consequently support critiques of Knowles' (1975) assumptions that adult learners are naturally self-directed irrespective of contextual conditions.

5.4 CONCLUSION

This chapter presented the findings of this study and highlighted the challenges and positive features of adult learning. Whilst the participants expressed personal fulfilment and capacity development, they also indicated challenges in balancing their educational endeavours with their personal and work responsibilities. They expressed that their learning progress was hindered by institutional inflexibility, mental fatigue, feelings of self-doubt, and insufficient external support. On the other hand, factors such as flexibility, self-directed learning, peer collaboration, and the application of knowledge significantly enhanced their overall experience. Significantly, their motivation for learning was driven by both individual aspirations and external career-related factors. Participants believed that the support shown by facilitators and their peers was important towards maintaining engagement. The discussion linked the findings to existing research and reinforced established adult learning principles, thereby providing new insights. New insights encompassed the evolving nature of learner motivation, the importance of external support systems, and the balancing roles that structured facilitation and informal peer networks can play in adult education. These findings are instrumental in providing recommendations to improve learning programs and address the structural challenges faced by adult learners.

The findings presented in this chapter demonstrate that barriers to adult learning are multidimensional and shaped by institutional, workplace, socio-economic, and personal factors. While several findings support Knowles' (1975) principles of adult learning, the data also reveal contextual limitations that influence adult learners' capacity for self-directed and sustained engagement in workplace-based learning. In chapter 6, there will be a critical discussion of the findings in relation to existing literature and the theoretical framework.

The next chapter presents the conclusion and recommendations for this study.

CHAPTER 6: CONCLUSIONS, RECOMMENDATIONS, AND LIMITATIONS

6.1 INTRODUCTION

This chapter critically examines the study's findings in relation to the existing literature and Knowles' (1975) principles of adult learning. The discussion examines how ETDP participants experience barriers to adult learning in workplace-based learning environments and the extent to which the findings support, extend, or challenge existing adult learning theory. The chapter further outlines the theoretical, practical, and policy implications of the study. The chapter starts with an overview of the research objectives determined and proceeds to the conclusions drawn for each objective. A summary is provided of the findings that were made and discussed in Chapter 5, with relevant conclusions discussed for each theme that was identified. The conclusion interprets the findings through the framework of Malcolm Knowles' (1975) principles of adult learning, specifically addressing how these principles connect to the challenges faced by adult learners in the South African context.

6.2 OVERVIEW OF THE RESEARCH OBJECTIVES

The study aimed to investigate the barriers to adult learning among ETDPs and their relationship to Knowles' principles of adult learning. This study was guided by the following research objectives:

1. How are the barriers to adult learning conceptualised in the existing literature?
2. How are Malcolm Knowles' (1975) principles of adult learning conceptualised in the existing literature?
3. What are the barriers to adult learning which are experienced?
4. What is the relationship between the barriers to learning experienced by the participants and the principles of adult learning formulated by Knowles (1975)?

These research objectives were reached through the completion of several chapters:

- Chapter 2 addressed research questions 1 and 2 through a review of the literature on adult learning and Knowles' theory of andragogy.

- Chapter 3 further contextualised Knowles' principles in the South African education and skills development landscape.
- Chapter 5 answered research question 3 through a detailed presentation of the empirical findings, identifying key themes and sub-themes based on participant interviews.
- Chapter 6, here, responds primarily to research question 4 by linking the empirical data to Knowles' (1975) principles and offering a critical interpretive discussion on how these adult learning principles support or fall short in addressing the lived experiences of learners. In doing so, the chapter also draws on findings across the study to present a holistic understanding of adult learning in the context of occupational qualifications.

6.2.1 Conclusions Regarding Research Objective 1

The literature reviewed in Chapters 2 and 3 conceptualises barriers to adult learning as comprising situational, institutional, and dispositional barriers. Barriers can include limited access to resources, rigid educational systems, socio-economic barriers, low self-belief, and past experiences with education. The findings of this study support this conceptualisation, as participants experienced interconnected barriers including time constraints, limited family and employer support, and self-doubt, which negatively affected their learning journeys. The findings further revealed barriers specific to occupational learning contexts, including limited preparedness for collaborative work and a lack of alignment between programme demands and adult learners' multiple life roles.

These context-specific barriers provided new perspectives on the literature, especially in relation to the under-researched field of education and training directed towards occupations, illustrated by the example of South Africa.

Building on this summary, the following conclusion is drawn from the study findings:

This study reinforced that barriers to adult learning are usually described in the literature as multi-dimensional, such as environmental, intrapersonal, and personal barriers, but a distinguishing feature of this study is the finding that barriers are context-

specific to the South African occupational training context. For example, institutional policies linking leave and flexibility were identified as significant barriers that have not been sufficiently considered in the literature. In terms of intrapersonal barriers, the learner's dual roles as a family member and an employee highlight additional concerns, such as mental fatigue and a lack of confidence. There is a need to engage in more locally situated and nuanced interpretations of the various typologies of barriers to adult learning in the workplace. Therefore, although models are very helpful and provide a useful framework, they need to be adjusted to communicate in more situationally appropriate ways within the South African workplace learning context. The findings further suggest that the effective application of Knowles' (1975) principles of adult learning may be influenced by workplace flexibility, institutional support, and the socio-economic realities experienced by adult learners. The findings, therefore, extend existing adult learning literature by demonstrating how workplace-based learning conditions within the South African context shape the experience of situational, institutional, and dispositional barriers.

6.2.2 Conclusions Regarding Research Objective 2

The literature reviewed in Chapters 2 and 3 provides important concepts based on Malcolm Knowles' (1975) principles of adult learning - self-direction, readiness to learn, orientation to learning, and intrinsic motivation - as starting points for andragogical practice, based on adult learners' autonomy, life experience, and internal motivation and relevance to learners' work and the desire for self-improvement. Whereas this study's findings provide evidence of the congruence of these concepts, particularly with adult learners' desire for flexible learning, relevance to work, and self-improvement, this study also critically reflects on these assumptions. As mentioned in chapter 5 (see Theme 1 and Theme 4), this was especially clear in their emphasis on flexible schedules, the relevance of course content to their work roles, and their desire for personal growth and development. While some adult learners exhibited strong self-direction and motivation, others were less confident or required more structured support, suggesting that Knowles' principles may not hold for all adult learners in all contexts.

This supports eventual developments in Knowles' theory, which acknowledge that self-directedness is not binary but exists along a continuum, influenced by personal and contextual factors (Zimmerman, 2000; Bandura, 1997). This study adds to the literature by showing how socio-economic context and professional practices in South Africa affect the degree to which Knowles' principles hold in practice. It is necessary to critically examine how the principles of Knowles operate in real-world contexts, particularly in job-related contexts that shape the process of workplace-based learning.

The literature clearly positions Knowles' six principles of adult learning as foundational to andragogy, particularly in describing adult learners as self-directed, experience-informed, and intrinsically motivated. However, this research argues that, in practice, the use of these principles depends on the learning context. For example, while the literature presents self-direction as inherent to adult learners, this research demonstrated that not all participants were high in self-efficacy or willing to learn collaboratively. This suggests that adult learners may require varying levels of guidance, support, and scaffolding depending on their learning and workplace contexts. Therefore, it is argued here that Knowles' principles are not always in play as principles of learning, but rather principles to aspire to in some cases, requiring guidance or institutional structures to make them a reality. This perspective provides a more critical application of Knowles' framework within workplace-based adult learning in South Africa, where learner readiness, autonomy, and self-direction may require institutional and workplace support rather than being assumed. These findings confirm the continued relevance of Knowles' (1975) principles of adult learning, while also suggesting that their successful application depends on supportive institutional and workplace conditions.

6.2.3 Conclusions Regarding Research Objective 3

The results presented in Chapter 5 indicated that adult learners encounter a variety of situational barriers within the environmental, intrapersonal, and personal domains. Environmental barriers included a lack of flexibility within the institution, predetermined training schedules, and insufficient employer support, especially in accessing study leave or facilities for workplace access. The lack of formal workplace experiences,

such as mentoring, feedback, and opportunities to apply theory into practice, limited participants' ability to successfully transfer academic knowledge and skills into the workplace and, in turn, achieve full integration of theory into their developing practice in real-life occupational contexts. Intrapersonal barriers were mental fatigue, reduced self-efficacy, and difficulty working with peers, which impacted engagement and learner performance. These barriers were influenced not only by individual circumstances, but also by broader structural and systemic conditions within workplace and educational environments, including organisational policies, institutional inflexibility, socio-economic inequalities, and limited workplace support structures.

Personal barriers included time management, family responsibilities, and a lack of family/community support, which were pronounced among single parents and learners in multiple roles. The barriers were consistent with much of the literature discussed in Chapter 2, which suggests that adult learners need support beyond just academic support, in psychosocial and logistical terms, to be successful in learning. The study contributes to the literature by addressing barriers to learning in the South African occupational learning context, an area with limited empirical focus, and specifically highlighting the reinforcing variables of socio-economic pressures that affect learners' ability to persist and succeed. These findings come from a broader study examining the relationship between the barriers faced by adult learners and the prior assumptions embedded in adult learning theory.

The study's findings demonstrate that barriers to adult learning in occupational learning contexts are interconnected and influenced by institutional, personal, and socio-economic conditions. Participants experienced institutional barriers such as rigid organisational structures and limited workplace support; intrapersonal barriers, including low confidence and mental fatigue; and personal barriers related to family responsibilities and time constraints. The findings further suggest that although adult learners may demonstrate self-directedness and motivation, the successful application of Knowles' (1975) principles is often constrained by workplace realities, organisational culture, and limited support systems within the South African context. Consequently, access to learning opportunities alone is insufficient without supportive

educational and workplace environments that recognise the complexity of adult learners' multiple roles and responsibilities. The study contributes to adult learning theory by illustrating how structural and socio-economic realities within occupational learning environments may constrain adult learners' ability to fully engage in self-directed and experiential learning.

6.2.4 Conclusions Regarding Research Objective 4

The analysis in Chapter 6 shows that, while much of Knowles' (1975) theory remains applicable, it is often constrained in South African and workplace/occupational learning contexts by educational/structural limitations. For example, although the participants' self-directed learning principle was upheld by their demonstrated initiative and responsibility for their studies, it was significantly influenced by their levels of confidence, experience in academic learning, and support during their studies. In the same vein, readiness to learn was not only influenced by intrinsic motivation but also by factors beyond the participants' control, such as the institution they were enrolled in and the flexibility of their workplace, which allowed them to study on their own terms and pace.

The participants were internally motivated to learn, but this motivation was also hampered by time constraints and family commitments. Participants appreciated collaborative learning, and whilst Knowles' (1975) principles were strong regarding peer and experiential learning, the collective effort was challenged by self-efficacy and readiness for group work. This implies that supporting Knowles' principles is beneficial, but not always adequate, as situational or contextual constraints cannot be underestimated. This study, therefore, extends Knowles' ideas in arguing for a shared institutional responsibility to support the establishment of enabling environments to suit the complex realities of adult learners.

Following the summary of each theme, the conclusions that are drawn by linking the barriers to learning experienced by the participants and the principles of adult learning formulated by Knowles. The findings therefore both support and extend Knowles' (1975) theory by demonstrating that adult learning principles remain applicable within occupational learning contexts, but are significantly influenced by contextual workplace, institutional, and socio-economic factors in South Africa.

6.3 SUMMARY OF KEY FINDINGS AND CONCLUSIONS

In working towards achieving Research Objective 4, five key themes emerged from the data. These themes offer insight into the experiences of adult learners. The themes are summarised, and conclusions are drawn from the findings.

6.3.1 Theme 1: Learning Experiences of Adult Learners

This study found that adult learners experience both positive and challenging aspects during the learning process. Positive aspects included personal fulfilment and the acquisition of new professional skills. As discussed in Chapter 3 and Section 3.4, these findings support Knowles' theory that adults are intrinsically motivated and focused on learning, which can be applied directly to their personal and professional growth (Knowles, 1975). Greater engagement and motivation were achieved through the program's relevance to participants' current roles. This aligns with Bouchrika (2024), who highlights that meaningful learning for adults arises when education is immediately applicable to real-life and work scenarios.

Participants reported challenges in balancing work, family, and study commitments. Chapter 3, Section 3.3 of the literature emphasises the conflicting roles adult learners face in education (Burton et al., 2011; Kurt, 2020). Additionally, many adult learners, particularly single parents, often lack adequate familial or institutional support, further hindering academic progress and increasing stress levels. These difficulties echo Govindaraju's (2021) findings, which assert that adult learners often struggle due to their multiple life roles, which require stronger institutional support systems.

6.2.1.1 Conclusions regarding Theme 1: Learning Experiences of Adult learners

In the context of South Africa, this study offers new insights by showing that programmes directed toward occupation are helpful for career advancement. However, these programmes often lack the structural flexibility necessary to accommodate the complex life circumstances of adult learners. In South Africa, this addresses a gap within local research about adult education principles and workplace learning. The study contributes to the limited research on occupational adult learning

in South Africa by illustrating the importance of addressing these specific experiential tensions in workplace education.

6.3.2 Theme 2: Barriers to Adult Learning

The study identified three categories of barriers experienced by adult learners: environmental, intrapersonal, and personal. Environmental barriers indicated a lack of institutional flexibility and minimal workplace accommodation, such as study leave. These findings mirror Singletary's (2022) observation that institutional barriers, including disengagement from facilitators and inadequate institutional support, especially in digital learning environments, can hinder learning outcomes for non-traditional students. This reinforces Knowles' principle of adult learners requiring learning environments that accommodate their unique life contexts, as discussed in Chapter 2, Section 2.3 of the thesis.

Intrapersonal barriers such as mental fatigue, lack of confidence, and adaptation challenges to team-based learning have been identified. Adult learners often struggle with self-confidence, particularly when balancing professional and personal responsibilities, as reported by Altunay and Özdemir (2025). Perceptions within Chapter 3 align with this, stressing that emotional readiness, learner identity, and cognitive factors influence adult learning. Additionally, learners' perceptions of inadequate preparation for collaborative educational settings reflect the concerns outlined in Chapter 2, Section 2.2.3. This underscores the importance of enhancing preparatory components within adult learning programs to better support team-based approaches.

Personal barriers, including limited family or community support and time management challenges, were clear as well. Consistent with Singletary (2022), the current study indicates that adult learners, especially single parents or caregivers, often feel isolated and experience increased pressure. This underscores why tailored support measures are important, as Loeng (2020) and du Toit-Brits (2018) suggest in Chapter 2, Section 2.3, since fostering self-direction also facilitates successful learning outcomes.

6.3.2.1 Conclusions regarding Theme 2: Barriers to Adult Learning

The findings suggest that Knowles' principles are insufficient unless contextualised within the learner's socio-economic environment. Therefore, institutions, employers, and policymakers should adopt a proactive and supportive framework to effectively address these barriers. Flexible learning options may be implemented to help overcome some ecological challenges, such as workplace accommodation, like study leave, may also be provided. Also, structured orientation sessions for occupationally directed learning programmes can help address intrapersonal challenges and support the development of collaborative learning skills. This, in turn, fosters teamwork capabilities that are increasingly essential in the future of work.

6.3.3 Theme 3: Positive Aspects of Adult Learning

Participants in this study expressed sincere appreciation for the positive aspects of the learning process, especially the programme's flexibility, the relevance of the content to their professional roles, and the opportunity to apply what they learned directly in their workplace.

The program's adaptable structure did allow for learners to manage their own schedules and pace. This was particularly helpful for those who had to balance work, family, and educational commitments. This adaptability of the learning programme bolstered participant engagement despite their many other commitments. Learner-centred design for adult education is quite important here. The principles of self-directed learning discussed in Chapter 2, Section 2.3.1, are supported by the findings of this study. Knowles' andragogical model links these principles to Readiness to Learn. Learners' need for autonomy and for control over learning experiences is likewise aligned with a flexible learning programme. Kahu et al. (2020) and Alghamdi (2021) stress that flexibility in learning, such as self-paced modules, asynchronous access to content, and adaptable submission deadlines, encourages student accountability and helps establish a more reliable and supportive bond between tutors and learners. Flexibility also improves learning outcomes when it fosters autonomy.

Participants stressed that the content was even more relevant to their professional roles. Most noted that the course material closely reflected real-world tasks, which also enabled them to apply new skills within their work environments. This practical application helped them understand, increased their confidence, and made them feel

more capable in their job roles. These reflections reinforce Knowles' (1975) principle of Learning Readiness, suggesting adult learners are often more motivated when what they learn applies to their job or life roles.

Furthermore, participants appreciated the collaborative element of the scheme, as it helped create a more thorough learning process. Peer engagement also contributed significantly to knowledge sharing, confirming Grus et al. (2024)'s assertion that adult learning is best supported by communities of practice. Participants noted that learning in this group setting improved their comprehension of complex concepts. Also, a greater sense of connection inside the educational environment was fostered.

6.3.3.1 Conclusions regarding Theme 3: Positive Aspects of Adult Learning

Despite growing interest in adult education, there remains a need to better understand how workplace learning can be effectively integrated into occupational training, particularly within the South African context. The focus of this study was on occupational learning programmes. This study aimed to address the gap by exploring how structured workplace integration strategies can enhance practical knowledge transfer within these programmes. Research by Grus, Lagbo, and Rozensky (2024) underscores the importance of designing adult learning experiences that are directly relevant to professional settings, thereby emphasizing the necessity of workplace-applicable learning. Similarly, Altunay and Özdemir (2025) illustrate that adults' learning strategies are closely connected to organizational identity and work flexibility, supporting the current finding that aligning learning initiatives with job roles can increase motivation and engagement among learners. Additionally, peer learning—often underrepresented in local literature—has been shown in this study to facilitate knowledge sharing and reduce feelings of isolation. This aligns with Bouchrika (2024), who highlights the significance of social learning in fostering engagement and promoting knowledge retention in adult education environments. Collectively, these insights contribute to a deeper understanding of workplace-integrated adult education and lay the groundwork for more inclusive, collaborative, and effective learning programs.

6.3.4 Theme 4: Motivations for Pursuing Adult Learning

The findings of this study indicate that adult learners' motivations are influenced by both intrinsic and extrinsic factors, highlighting the complex and rapidly evolving nature of adult motivation. External incentives, such as employer requirements or the need to improve job market competitiveness, often initially engaged participants in their learning. As time passed, they came to build internal aspirations. The motivations included intellectual engagement, as well as a desire for self-improvement and personal fulfilment. Knowles' fifth principle of adult learning states that adults are more motivated when learning addresses personally relevant problems, and that this interplay influences motivation as learning progresses.

As seen in Chapter 5, Theme 4 (Table 5.6), many participants were driven by intrinsic factors, such as the desire to enhance their personal and professional skills and engage in lifelong learning. Participant 4 reflected this sentiment, stating, "*My home life was being able to ensure that you were always learning something new... whether it was formal or informal knowledge.*" This is consistent with the literature, which views motivation to learn as internally driven, especially when learning is connected to an individual's values, self-perception, and long-term goals (Ryan & Deci, 2020; Cooper & Henschke, 2003).

On the other hand, extrinsic motivators such as opportunities for promotion, better job prospects, and employer incentives were also significant. Participant 3, for instance, shared, "*I decided that I'm going to invest in myself... I was going to pay the difference out of my own pocket to enrol on the learning programme,*" demonstrating how an external circumstance (retrenchment and employer funding) initiated the journey, which later evolved into a personally valued pursuit. This progression from extrinsic to intrinsic motivation aligns with findings from Knowles (1975) and Self-Determination Theory, as proposed by Ryan and Deci (2020), which suggest that adult learners tend to internalise extrinsic motivations over time, especially in supportive learning environments.

Participants emphasised that the course came at an opportune moment in their careers or life circumstances, which enhanced their engagement. These insights were

echoed in Chapter 3, where the literature underscored the dynamic nature of adult learner motivation and the need for training to accommodate evolving needs and developmental stages.

6.3.4.1 Conclusions regarding Theme 4: Motivations for Pursuing Adult Learning

Critically, the South African context adds a layer of urgency and opportunity to this discourse. Adult learners, particularly in occupationally directed programmes, are often re-entering education to adapt to shifting economic conditions or employer requirements. The study addresses gaps in the South African adult education literature (discussed in Chapter 3, Section 3.4) that previously lacked a nuanced understanding of how intrinsic and extrinsic factors interplay in local workplace-based learning settings. As such, this research contributes to a more contextually grounded understanding of motivation, highlighting the importance of designing learner-centred programmes that evolve. This resonates with Altunay and Özdemir (2025), who assert that adult learners' motivation evolves in response to workplace dynamics and perceived autonomy. Similarly, Govindaraju (2021) suggests that integrating motivational theory into curriculum design enhances adult learner commitment. The findings support Knowles' emphasis on motivation but also show that institutional and organisational culture significantly influence learners' sustained engagement.

6.3.5 Theme 5: Real-Time Facilitation of the Learning Process

The study found that real-time facilitation—supported by both facilitators and peers—played a crucial role in shaping adult learners' experiences. Participants consistently valued facilitators who adopted a supportive, guiding role rather than a directive one, consistent with Knowles' (1975) principle of self-directed learning (Chapter 2, Section 2.3.1). Facilitators who provided constructive feedback, clear instructions, and emotional encouragement created an environment where adult learners could navigate challenges more confidently. Participant 6 expressed appreciation for a facilitator who “allowed us to make mistakes and learn from them,” reflecting the enabling, non-authoritarian tone central to adult learning theory.

As highlighted in Chapter 5 (Theme 5), the peer-learning environment was equally significant. Participants gained conceptual clarity, moral support, and a sense of community through peer interactions. Participant 1 noted, “*You could relate concepts to your work experience... and learn from the group as well.*” This reinforces the social constructivist view of learning, especially Vygotsky’s (1978) theory that knowledge is co-constructed through dialogue and shared experiences. In the South African context, where many adult learners face isolation due to demanding personal responsibilities, the community of learning that developed in group settings was critical for sustaining engagement and motivation.

However, not all participants benefited equally from collaborative learning. Some reported challenges linked to team dynamics and self-efficacy, with Participant 4 stating, “*I actually ended up totally withdrawing... just working on my own rather than being self-directed.*” This reflects a broader issue discussed in Chapter 3, where the literature indicates that collaborative learning is often assumed rather than taught (Alghamdi, 2021). The findings suggest a gap in training adult learners to engage effectively in team-based tasks, particularly in occupational learning programmes where collaborative assignments are common but not always supported with the necessary preparatory instruction.

6.3.5.1 Conclusions regarding Theme 5: Real-Time facilitation of the learning process

These findings expand on the literature by showing that effective facilitation is not solely about content delivery, but also about emotional scaffolding and helping learners build confidence in collaborative settings. This study adds to the growing body of research emphasising the need for intentional design in adult education to prepare learners for peer engagement, particularly in occupational and work-based learning contexts.

In summary, the study confirms that real-time facilitation, both by facilitators and peers, is essential to adult learning success, but also identifies a critical gap in equipping adult learners with the collaborative skills necessary for effective group learning. Bridging this gap will require targeted orientation sessions on group work, fostering

psychological safety in learning environments, and an emphasis on relationship-building as a foundational component of curriculum design in adult education.

Facilitators were frequently regarded by participants as playing a supportive and empowering role, which aligns with Knowles' (1975) perspective that adult learners thrive in environments where they can assume responsibility for their own learning. Instead of serving as the primary source of knowledge, facilitators took on the role of guides and motivators, providing clarity, constructive feedback, and emotional support. This methodology fostered sustained engagement among learners, particularly during times of challenge or uncertainty. Additionally, peer support was prominent, as individuals assisted one another through explanations, shared resources, and emotional encouragement. This collaborative approach underscores the social dimension of adult learning, where group discussions enhance understanding and foster a sense of community (Ryan and Deci, 2020). The conceptual model, illustrated in Figure 6.1, provides a visual representation of the connection between the core principles of adult learning, as defined by Knowles (1975), and the actual barriers adult learners encounter in practice or workplace situations. The model suggests that although adult learners have motivation, life experience and readiness to learn, these principles can also be moderated or impeded by barriers, such as institutional rigidity, minimal support, and personal responsibilities. This model underscores the critical roles of facilitation, motivation, and contextual provision in translating theoretical adult learning principles into effective adult community learning practices.

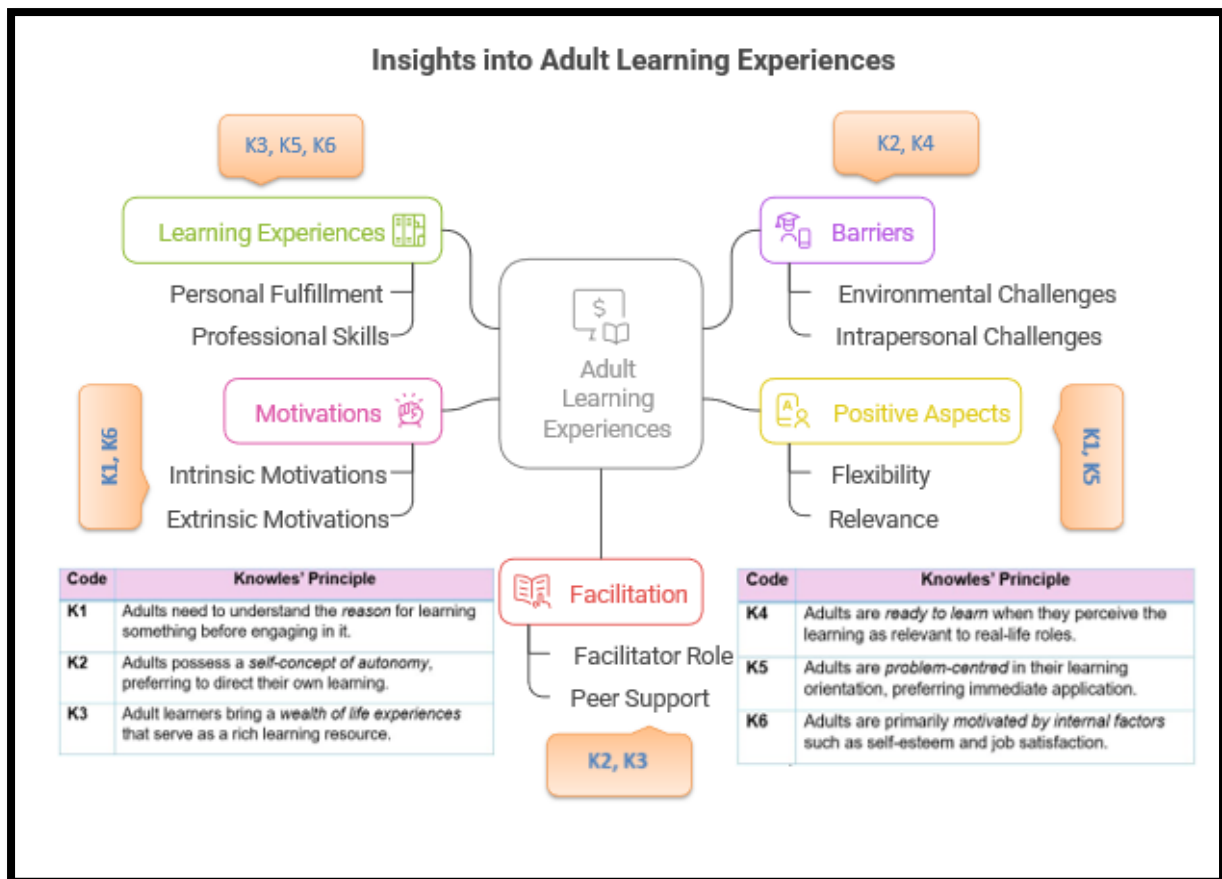


Figure 6. 1: Mapping the Study's Thematic Findings to Knowles' Principles of Adult Learning
Source: *Own construction with the aid of Napkin AI*

Figure 6.1 presents a conceptual model, developed from the study's thematic findings and critical reflections, that provides a structured response to the lived experiences of adult learners enrolled in occupationally directed education and training programmes. It identifies five interrelated areas: learning experiences, barriers, positive aspects, motivations, and real-time facilitation, each of which reflects the complexities of adult learning within professional environments. The conceptual model incorporates Knowles' (1975) six principles of adult learning (K1–K6), aligning each thematic area—including learner experience, motivation, barriers, and real-time facilitation—with corresponding andragogical assumptions. This alignment aims to demonstrate how adult learning occurs and how it can be effectively supported within occupational education settings. The conceptual model proposes targeted interventions to improve learner engagement, support, and success and aligns with the broader principles of andragogy.

A notable contribution of this study is its explicit focus on occupational adult learning. While existing literature has extensively addressed community-based or academic adult education, research on adults engaged in workplace-aligned learning remains limited. This study addresses this gap by foregrounding the unique challenges and motivations of adult learners balancing employment, education, and personal responsibilities.

Several findings align closely with Knowles' (1975) assumptions of adult learning. For instance, participants who demonstrated agency in addressing group issues or time constraints exemplified self-directed learning, a core tenet of Knowles' (1975) principles. Similarly, the strong link between learning content and participants' professional roles affirmed the principle of readiness to learn. The ability to apply learning immediately to workplace tasks demonstrated a problem-centred orientation to learning, and both intrinsic and extrinsic motivations featured prominently, supporting Knowles' view that adult learners are driven by internal factors such as personal growth and career advancement.

However, this study also extends beyond Knowles' assumptions by highlighting critical dimensions that traditional andragogical theory does not adequately address. Notably, the findings show that collaborative learning is not an innate skill among adult learners. Many participants lacked the confidence or prior experience necessary to fully engage in peer collaboration, suggesting that facilitators should provide structured preparation and support for group learning activities. This insight adds to the literature by identifying a gap in adult learning theory regarding the development of interpersonal learning competencies.

Another key insight concerns the role of facilitators, who were not only viewed as content guides but also as providers of emotional support. Their ability to motivate, empathise, and offer constructive feedback was instrumental in sustaining learner engagement. This expands Knowles' role of the facilitator by emphasising the emotional scaffolding required in adult education.

Additionally, environmental and institutional barriers, such as inflexible work schedules and limited access to resources, were significant obstacles. These findings underscore

the importance of systemic organisational support mechanisms and challenge the assumption that adult learning success depends solely on the learner's initiative.

In conclusion, this conceptual model offers a practical, evidence-based model for enhancing adult learning in occupational contexts. It affirms core principles of adult learning while highlighting the need for institutional responsiveness, emotional support, and structured collaboration. It serves as a valuable tool for learning institutions, facilitators, and employers aiming to foster inclusive and effective workplace learning environments and contributes to addressing critical gaps in adult learning research and practice in South Africa.

Collectively, the findings of the study contribute conceptually to the adult learning literature by demonstrating that Knowles' (1975) principles of adult learning remain relevant in workplace-based learning environments; however, their application is significantly influenced by institutional support, workplace flexibility, organisational culture, and socio-economic realities in the South African context. The study therefore refines the application of Knowles' principles by showing that adult learners' self-direction, readiness to learn, and motivation cannot always be assumed and may require varying levels of organisational, institutional, and interpersonal support within occupational learning environments.

6.4 POLICY IMPLICATIONS CONCERNING ADULT LEARNING IN SOUTH AFRICA

The policy considerations arising from the study's findings emphasise the components of relevance, flexibility, and supported engagement in work-based adult learning. First, regarding Themes 1 (Learning Experiences) and 3 (Positive Aspects), system- and provider-level policies should require intentional alignment between the curriculum and relevant workplace roles. Policies need to promote recognition of prior learning (RPL) options and approaches to improve access and accelerate progression. Given the contextual challenges described in Theme 2 (Barriers), funding and quality assurance policies should provide incentives for flexible delivery, including appropriate study leave, low-data or zero-rated access, and local learning hubs. Accountability requirements should go beyond enrolment and completion to include evidence of

practice, such as work-based projects, portfolios, and supervisor verifications, demonstrating the link between perceived relevance and workplace transfer detailed in Themes 1 and 3.

In addition, the importance of real-time support in Theme 5 (Facilitation) and the balancing of intrinsic and extrinsic motivations noted in Theme 4 (Motivations) highlight a policy requirement to professionalise facilitation and institutionalise peer-learning supports. Professional development for providers and employers will need to include foundations of adult learning pedagogy, formative feedback, emotional scaffolding, and explicit preparation for shared learning and for handling intra-personal and team-based tensions described in Themes 2 and 5. Organisations and workplaces need to create formal onboarding processes that include groups, mentoring, and learning circles, as well as provisions for caregivers and learners with limited available time. These arrangements will enhance motivation and perceived capability and facilitate ongoing engagement. Ultimately, these strategies should facilitate the development of occupationally relevant programs that embody the positive characteristics identified in Theme 3, leading to sustained improvements in performance.

6.4.1 Short-term Recommendations

Professional development for providers and employers should include the foundations of adult learning pedagogy, formative feedback, emotional scaffolding, and explicit preparation for shared learning and for handling interpersonal and team-based tensions.

6.4.2 Medium-term Recommendations

Organisations and workplaces should create formal onboarding processes that include mentoring, peer-learning groups, and learning circles, as well as support mechanisms for caregivers and learners with limited available time.

6.4.3 Long-term Recommendations

System- and provider-level policies should promote institutional flexibility, curriculum-workplace alignment, and structured workplace support systems to enhance adult learner engagement and programme completion.

6.5 RECOMMENDATIONS

Based on the findings highlighted in this study, the following recommendations are suggested to address the barriers to adult learning and enhance the effectiveness of learning and teaching for Education, Training, and Development Practitioners in South Africa using Malcolm Knowles' (1975) principles of adult learning. These recommendations are directly informed by the thematic findings presented in Chapter 5 and are intended to translate key insights into practical and policy-level action points.

6.5.1 Recommendations for Industry and Practice

- I. **Encourage Self-Directed Learning:** Institutions of higher learning and workplaces should promote self-directed learning by providing adult learners with resources needed to assist adult learners to manage their own learning. This could comprise information technology devices, access to counselling services when adult learners feel stressed and anxious, and access to online learning platforms, which will provide learners with an opportunity to learn at their own pace and time.

- II. **Enrich Readiness to Learn:** Learning interventions should be designed in a way that results in the creation of learning schedules which are flexible and address the unique needs of learners, options of modularised short courses should be offered, and participation in workplace-based learning opportunities where learners can gain workplace-based experience and where they can apply what they have learnt to the workplace should be encouraged. Baseline assessments can also be conducted to identify a learner's readiness to enrol on an occupationally directed learning programme.

- III. **Promote Motivation:** Learning interventions should be designed in a way that appeals to the motivations of adult learners in both their personal and professional lives. This can be done by creating learning activities which give adult learners exposure to the workplace through case studies, problem-based learning and activities that involve the workplace component. Problem-solving opportunities which allow learners to reflect on their learning and apply it to their jobs and personal lives will provide adult learners with a sense of meaning and accomplishment.
- IV. **Remove Institutional Learning Barriers:** Learning institutions should implement flexible and learner-centred approaches to learning and teaching, by making available online learning approaches, providing financial assistance, and offering the services of a dedicated class mentor to support learners who need extra lessons or academic support. This could also include offering counselling services to adult learners who experience stress in their personal lives. These support services will allow adult learners to balance the various roles and responsibilities they fulfil.
- V. **Promoting peer support groups:** Learning Institutions should implement initiatives which encourage learners to work together in the form of group projects. These initiatives will develop team-building skills among learners and will allow learners to experience a form of peer support to assist with feelings of isolation or stress, which is experienced during the learning process. Therefore, organisations should create communities of practice where participants in occupational learning programmes can find support and share knowledge with others in similar situations. This also builds institutional knowledge.
- VI. **Optimise the Utilisation of Technology:** Learning Institutions should capitalise on the use of technology to improve how learning and teaching take place. Technology makes learning and teaching more accessible for adult learners based in different geographic locations and available at different times. Different forms of electronic and blended learning can assist adult learners who require

flexibility in their learning. Organisations can support access to occupational learning by making learning technologies available through human resource information systems.

- VII. **Enhancing Adult Learning Policies:** Organisations should incorporate occupational learning opportunities in their training and development policies. Furthermore, employers that are supportive of workplace learning, whether through internships, learnerships, or other occupational learning pathways, should ensure that their HRM and HRD policies align with accreditation requirements and the accompanying policies and procedures. Employer policies should explicitly account for risks associated with study-related leave, funding access for learners and technological access to support the learners. Ensuring alignment of organisational policies with the broader landscape of skills development contingencies not only satisfies regulatory requirements but also helps alleviate the stress, frustration, and lack of engagement reported by participants in this study. Employers that adopt an intentional approach to supporting occupational learning within their policy frameworks can create environments that more readily enable adult learner success.
- VIII. There is a need for organisational policy reforms that would provide evidence of real organisational support for occupational training initiatives. Organisations will be able to demonstrate their commitment to supporting employee up-skilling by including occupational qualifications as part of the organisation's Human Resource Development Policy, thereby enabling them to provide the support needed for up-skilling initiatives. Not only will this support contribute to the professional growth of employees, but it will also enhance organisational effectiveness and positively influence national development objectives.

6.5.2 Recommendations for South African Organisations

Improving Access and Policy Alignment: Organisations in South Africa support equitable access to occupationally directed learning programmes. The challenges faced by participants were compounded by a lack of flexible workplace policies and

technological access, as identified in this study. Therefore, organisations should review their human resource development policies to include structured support for occupational learning, for example, through study leave, recognition of non-traditional learning, and the inclusion of occupationally directed learning in the organisation's career advancement paths. In line with DHET goals and priorities, employers could work with SETAs to develop accessible upskilling pipelines that take adult learners' needs into account.

In addition, access to technology is still not equal in and across sectors. Employers are urged to invest in providing technological infrastructure such as devices and connectivity, and online learning platforms or subsidise the provision of technological infrastructure to bridge stark digital divides. These activities should not be limited to supporting adult learners but assisting companies to meet national imperatives about skills development for the Fourth Industrial Revolution (4IR). In keeping with national priorities, there are opportunities for organisations to partner with Sector Education and Training Authorities (SETAs) such as CHIETA and MICT SETA. As an example, CHIETA has introduced Smart Skills Centres across South Africa, especially in rural, less-resourced areas, where there are learners with free access to digital infrastructure, online training, and content to support 4IR readiness (Burger, 2024). These Centres offer virtual reality training, robotics hubs, and employment supporting resources. Organisations may be able to explore similar opportunities with MICT SETA, which focuses on digital skills development that supports national goals in the digital economy.

Access to funding opportunities: Employers who participate in workplace-based learning opportunities can utilise funding opportunities for both employed and unemployed learners. Their participatory role is needed to access funding opportunities from government agencies like SETA's and NSFAS, since funding is given directly to employers only, and thereafter, employers recruit employed and unemployed adult learners for job-market training.

In addition to formal employer-based funding, the SETAs also provide bursaries and funded learnerships and internships, where a stipend is paid directly to learners enrolled in SETA-funded learning interventions. It provides additional government-

backed funding opportunities to support the employability of adult learners. One of the significant aspects of these funding opportunities is that they provide not just access to education but also workplace experience, thus offering a holistic development opportunity. Realistically, the skills development interventions align with initiatives targeted at national economic growth and are particularly pertinent to unemployed adults or to adults not yet part of the formal employment structure.

Creating a culture of continuous learning and development is needed in workplaces to encourage adult learners to engage in learning opportunities and enable them to complete the learning intervention.

Create lifelong learners: Empowering adult learners to learn successfully using Knowles' (1975) principles of adult learning can help them complete their learning journey without barriers and become skilled and competent in their jobs. A skilled workforce drives economic growth, as South African-based entities offer quality products and services to the global market.

6.6 REFLECTIONS ON MY LEARNING EXPERIENCE

Completing this research has been a revelation for me, both professionally and personally. Working for a SETA, I have always been committed to making access to learning a reality; nevertheless, this research allowed me to listen to the voices from behind the numbers, the adult learners who are having to traverse real-life barriers to find growth and learning.

Working within Knowles' (1975) principles of adult learning helped me articulate how adult education should and must be approached: in a way that ensures empathy, flexibility and relevance. What struck me is that these principles often sit outside reality because institutions need to actively support learner-ways of being with policies that are flexible and relevant, emotional support, and by leading learner possibilities to genuine opportunities.

Listening to participants talk about their experiences, struggling to manage family, work and study demands, was another reminder of how crucial it is for SETAs and employers to intentionally work together to create learner-centred learning

environments. This experience has renewed my passion for skills development and reinforced my intention to pursue change, not only through policy and frameworks, but also through advocacy work that prioritises learners' realities.

On a personal level, this journey has made me a more reflective and empathetic practitioner. It has reminded me of my why, the reason I do this work: for the possibilities, for the possibilities to open doors, and for ensuring that no adult learner who pursues their education is left behind because of things they cannot control.

6.7 LIMITATIONS

The study offers valuable insights into the barriers to adult learning based on Knowles' 1975 principles of adult learning; however, it is important to acknowledge certain limitations. These limitations include:

This research involved a targeted group of ten ETD Practitioners who have completed the National Certificate and National Diploma in Occupationally Directed Education, Training, and Development Practices. While the in-depth qualitative insights generated valuable and meaningful data, the limited sample size and specific occupational focus may restrict the generalisability of the findings. Consequently, the diverse experiences and perspectives presented in this study may not fully represent those of adult learners in other professional fields, economic sectors, or national contexts. It is important to note that all participants were based in South Africa. The findings are contextualised within a specific socio-economic and policy environment and may not be directly applicable to international adult learning contexts without further comparative research.

In addition, the sample was mostly composed of adult learners with similar socio-economic and cultural positions, which may limit the variation in voices captured. Thus, the implications of the findings are likely not representative of learners from other ages, language groups, educational backgrounds or other areas of South Africa.

Beyond demographic and contextual factors, the temporal scope of the research also presents a limitation that must be acknowledged. The research provides an overview

of adult learners' experiences within a specific timeframe, without follow-up to assess any longer-term influences of the learning experience on professional development or workplace performance. Drawing conclusions about sustained benefits or changing barriers is limited to the time of the study. Future research could address these limitations through comparative studies across different occupational and educational contexts, as well as longitudinal research examining how barriers to adult learning evolve over time.

In addition, the qualitative research design, including semi-structured interviews and thematic analysis, may have introduced elements of subjectivity into the interpretation of participants' experiences and findings. Although measures such as reflexivity, careful coding procedures, and alignment with the study objectives were applied to enhance trustworthiness, the interpretation of qualitative data remains influenced by the researcher's analytical perspective.

6.8 CONCLUSION

In concluding this study, it is apparent that the types of barriers to adult learning in the South African context is broad and shared amongst the participants. The study found that Knowles' (1975) principles of adult learning provide a valuable framework for identifying and understanding barriers to adult learning; however, it is not universally applicable and should be adapted within the context in it is being used to reduce the barriers to adult learning.

By addressing these barriers through strategic interventions, learning institutions can enhance the quality of adult learning environments and approaches that support adult learners' journeys. Future research should explore and investigate the barriers to adult learning and how they can be addressed using Knowles' (1975) principles of adult learning across different contexts, to strengthen the interventions and strategies that can be implemented to reduce these barriers. This study contributes to the field of adult learning by contextualising Knowles' (1975) principles within South African occupational learning environments and demonstrating how workplace, institutional, and socio-economic realities shape adult learners' experiences of barriers to learning.

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APPENDIX 1: ETHICAL CLEARANCE



UNISA HRM ETHICS REVIEW COMMITTEE

Date: 11 April 2023

Dear Ms Fatima Suleman Bhayat

Decision: Approved

NHREC Registration #: (if applicable)
ERC Reference #: 2023_HRM_001
Name: Ms Fatima Suleman Bhayat
Student #: 35386215

Researcher: Name: Ms Fatima Suleman Bhayat
E-mail address, telephone # 35386215@mylife.unisa.ac.za & fatima.bhayat@yahoo.com, 082 450 7394

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Name: Ms Liezl Diedericks
E-mail address, telephone # ldiedel@unisa.ac.za, 083 274 8027

The working title of the research:


Analysing the barriers to adult learning specifically for Education Training and Development Practitioners (ETDP) in a South African setting using Knowles' principles of adult learning

Qualification: MCom

Thank you for the application for research ethics clearance by the UNISA HRM Ethics Review Committee for the above-mentioned research.

The **low-risk** application was reviewed by a Sub-committee of URECR on 16 March 2023 in compliance with the Unisa Policy on Research Ethics and the Standard Operating Procedure on Research Ethics Risk Assessment. The ethics application was approved on 11 April 2023.

The proposed research may now commence with the provisions:



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1. The researcher(s) will ensure that the research project adheres to the values and principles expressed in the UNISA Policy on Research Ethics.
2. Any adverse circumstance arising in the undertaking of the research project that is relevant to the ethicality of the study should be communicated in writing to the HRM Committee.
3. The researcher(s) will conduct the study according to the methods and procedures set out in the approved application.
4. Any changes that can affect the study-related risks for the research participants, particularly in terms of assurances made with regards to the protection of participants' privacy and the confidentiality of the data, should be reported to the Committee in writing, accompanied by a progress report.
5. The researcher will ensure that the research project adheres to any applicable national legislation, professional codes of conduct, institutional guidelines, and scientific standards relevant to the specific field of study. Adherence to the following South African legislation is important, if applicable: Protection of Personal Information Act, no 4 of 2013; Children's Act no 38 of 2005 and the National Health Act, no 61 of 2003.
6. Only de-identified research data may be used for secondary research purposes in the future on the condition that the research objectives are similar to those of the original research. Secondary use of identifiable human research data requires additional ethics clearance.
7. No fieldwork activities may continue after the expiry date of **April 2026**. Submission of a completed research ethics progress report will constitute an application for renewal of Ethics Research Committee approval.

Yours sincerely,



Name of the Chair: Dr Elizabeth Rudolph

E-mail: rudolec@unisa.ac.za

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Signature

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APPENDIX 2: INFORMED CONSENT FORM

H R CONSULTING

12 February 2020

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Cape Town, 7700
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RE: Informed Consent Form

Name of researcher: Fatima Bhayat

Contact detail: Fatima.bhayat@yahoo.com

Title of the research: Investigating the barriers to adult learning in a South African setting within the context of Knowles' (2012) principles of adult learning

Purpose of the research: The purpose of this research study is to investigate and understand the barriers facing adult learners. In order to be responsive to the needs of the economy and society, South Africa requires a workforce that possesses the requisite knowledge, skills and attitudes which are in demand by the global economy. Addressing barriers to adult learning helps close opportunity gaps for adult learners who want to reach their full potential, but are unable to do so, because of the obstacles they face in the learning environment.

Your participation in this study: As an adult learner enrolled on a learning intervention, your responses provided in this study will contribute to creating an awareness of the need to reduce barriers to adult learning, so that learning conditions can be enhanced. Your participation will allow a sample for this study to be obtained in order to collect information which will be used to answer important research questions.

How will information be obtained: Information for this study will be obtained by requesting your voluntary participation, in responding to questions contained in the survey. You are under no obligation to participate in this study and have the option to withdraw your participation, prior to submitting the survey. Information obtained from this study, will be used for research purposes only, which means that results from the study will be used to gather information about the opinions and perceptions of adult learners. There will be no compensation for the study, and participation is voluntary.

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B-BBEE STATUS: Level 2 (Generic) - Empowering Supplier: 125% Recognition
Private College: 2012/FE07/038 - Company Reg No.2009/017829/07
Accreditation: ETDP SETA: 10473 - SERVICE SETA: 3857 - LG SETA: LGRS-ETDP-510111215 - W&R SETA - FOODBEV SETA - QCTO: SDP1228/18/00110

Master's study: Analysing the barriers to adult learning specifically for Education Training and Development Practitioners (ETDP) in a South African setting, using Knowles' (1975) principles of adult learning

CONSENT TO PARTICIPATE IN THIS STUDY

Dear Prospective Participant,

You are invited to participate in a research study conducted by Fatima Bhayat under the supervision of Jo-Anne Botha, in the Department of Human Resource Management, towards a master's degree at the University of South Africa (UNISA).

The researcher is inviting you to participate voluntarily in a study, which will be conducted using the Microsoft Teams virtual meeting application. The interview questions are predetermined and are designed to study the barriers to adult learning. The questions asked will be based on your experience as an adult learner. You were selected to participate in this interview process because you completed the Occupationally Directed Education, Training and Development Practices qualification. You will not be eligible to participate in the study if you are younger than 18 years and have not completed the Occupationally Directed Education, Training and Development Practices qualification. By participating in this research study, you agree that the information you provide may be used for research purposes, including dissemination through peer-reviewed publications and conference proceedings. All responses will be analysed after the data collection process is completed. Participants will not be identifiable in the research study, as the names of participants will not be included in the findings of the study.

It is anticipated that the information gained from this study will help to obtain a better understanding of the barriers to adult learning. In addition, this study aims to increase the number of learners who access learning opportunities in the post-school education and training system, to meet the skills and training development needs of the country.

You are under no obligation to participate in the interview process and can withdraw from the study prior to conducting the interview. The responses provided will be kept anonymous, meaning that there will be no way of connecting the information that you provide to you personally. Consequently, you will not be able to withdraw from the study once you have completed the interview process.

If you choose to participate in the interview process, it will take up no more than an hour of your time. You will not benefit from your participation as an individual; however, it is envisioned that the findings of this study will allow for mechanisms to be implemented, which will assist in addressing adult learners' needs by institutions of higher learning and will go a long way in assisting to improve the quality of the training and learning experience.

It is not foreseeable that you will experience any negative consequences by participating in the interview process. The researcher undertakes to keep any information provided herein confidential, not to let it out of the researcher's possession and to report on the findings from the perspective of the participating group and not from the perspective of an individual.

The records will be kept for five years for audit purposes where after it will be permanently destroyed. You will not receive any financial compensation nor receive any incentives for your participation in the survey.

The research was reviewed and approved by the University of South Africa's (UNISA) Department of Human Resources. The primary researcher, Fatima Bhayat may be contacted using the email address: Fatima.bhayat@yahoo.com. Should you have any questions regarding the ethical aspects of the study, you may contact the chairperson of the Ethics Research Committee using engelm1@unisa.ac.za. Alternatively, you may report any serious unethical behaviour on the University's Toll-Free Hotline 0800 86 96 93.

You are deciding whether or not to participate by continuing to the next page. You are free to withdraw from the study at any time prior to clicking the send button. By completing the interview process, you imply that you have consented to participate in this research.

Your willingness and time taken to participate in this research study, is greatly appreciated and valued. Please submit the completed questionnaire by 30th xxx 2023.

Thanking you in advance.

Kind Regards

Fatima Bhayat

Student Number: 35386215

APPENDIX 3: INTERVIEW GUIDE

SEMI-STRUCTURED INTERVIEW GUIDE – EDUCATION TRAINING DEVELOPMENT PRACTICE (ETDP) LEARNING EXPERIENCE

QUESTION 1

Tell me about your learning experience when you attended the Occupationally Directed Education, Training and Development Practices (ODETD) qualification?

Follow up: What would you say was positive about the experience and what was negative about the experience?

Please Explain

QUESTION 2

In what way do you think you learn differently now as an adult, as opposed to when you were a child?

Follow-up Question: Is learning more meaningful and purposeful to you now as an adult, than when you were a child?

Please explain your response

QUESTION 3 (Self Concept)

How do you think the Occupationally Directed Education, Training and Development Practices qualification (ODETD) made you take greater responsibility for your own learning needs and goals?

Follow-up Question: Did you find that you had to use your personal time or make changes to your daily schedule to fit in self-study time?

Please explain fully

QUESTION 4

What were the barriers that you had to overcome to complete the ODETDP qualification?

Follow-up: *based on the answer that the participant provided, probe further and ask if he/she experienced any:*

- Personal barriers (internal in oneself)
- Environmental barriers (home and domestic environment)
- Environmental barrier (work environment) *(or whatever other areas where barriers might be present)*
-

Please explain in-depth your response

QUESTION 5

What would you say was instrumental in helping you overcome the barriers that you experienced?

Follow-up Question: If there were no barriers, what would you say was a means of support to you throughout the learning experience?

Follow-up Question: If there were barriers, how did you overcome these barriers to learning?

QUESTION 6 (Experience)

How do you think your life and work experience prepared you in some way for this learning opportunity – how did it help you?

Follow-up Question: In what way did your work and life experience help you to complete the ODETD qualification?

Describe comprehensively.

QUESTION 7 (Need to Know)

In what way has the learning process changed the way you approach and perform tasks within your job?

Follow-up Questions: How has the ODETD qualification helped you to improve the way in which you complete tasks within your job better.

Discuss in detail.

QUESTION 8 (Readiness to learn)

How do you feel about the timing of this training in relation to where you are in your career and what you are currently doing in your job?

Follow-up: Would it have been more appropriate at an earlier / later stage in your career do you think?

QUESTION 9 (Motivation)

Why did you attend the training / What was your motivation for enrolling for this qualification?

Follow-up: Did the training benefit you personally or did you attend mainly because your employer required you to attend the training?

QUESTION 10 (Orientation to learning / Immediate Application)

How has learning assisted you in solving or addressing challenges within your job?

Follow-up Question: Do you feel that you are better equipped to complete challenging tasks within your job?

QUESTION 11

Lastly, do you have further thoughts or comments about your learning experience, before we conclude the interview?

Thank you for taking the time to respond to the questions and for all your valuable information. Your responses will assist in helping learning institutions to understand adult learners' needs and will improve the experience of future learning interventions.

APPENDIX 4: CERTIFICATE OF LANGUAGE EDITING

EDITING CERTIFICATE FOR ACADEMIC WORK

I confirm that I have proofread and carefully reviewed the dissertation titled ***Analysing the barriers to adult learning specifically for Education Training and Development Practitioners (ETDP) in a South African setting, using Knowles' (1957) principles of adult learning BY Fatima Bhayat***

This work was submitted for a master's degree at the University of South Africa (UNISA).

The dissertation was thoroughly edited for language, grammar, academic tone, and formatting in accordance with the prescribed guidelines. The edited document was returned to the client with evidence of tracked changes and suggestions for improvement. The implementation of these changes remains the responsibility of the author.

DR. MALENI THAKUR

EDITOR

24 August 2025

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