

Perceptions on adult learning and continuing vocational education and training in Europe

Volume 1: Second opinion survey
MEMBER STATES

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It can be accessed through the Europa server (<http://europa.eu>).

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The **European Centre for the Development of Vocational Training** (Cedefop) is the European Union's reference centre for vocational education and training, skills and qualifications. We provide information, research, analyses and evidence on vocational education and training, skills and qualifications for policy-making in the EU Member States.

Cedefop was originally established in 1975 by Council Regulation (EEC) No 337/75. This decision was repealed in 2019 by Regulation (EU) 2019/128 establishing Cedefop as a Union Agency with a renewed mandate.

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Foreword

Image influences actions. People's impressions of other people, events and issues can be positive or negative depending on the image they have. Adult learning and continuing vocational education and training (CVET) are important to Europe's future prosperity. They are central to enabling adults acquire the knowledge, skills and competences they need to manage changing jobs and lives. They also support employment, competitiveness and innovation.

Cedefop's first opinion survey indicated that vocational education and training (VET) is often perceived as a less attractive learning option compared to general education. However, the first survey prompted questions about the impressions people have exclusively and specifically about VET for work and life and not in comparison with other types of learning.

Cedefop's second opinion survey explores these questions with reference to adult learning and CVET. The image of adult learning and CVET is constructed from people's opinions of their perceived value in delivering desired outcomes for individuals, society and the economy.

The survey is wide, comprising more than 40 000 interviews of a random sample of people aged 25 and over in the European Union, Norway and Iceland. Data have been analysed according to Member States and across several socioeconomic and demographic groups. The findings are presented in two volumes: the first looks at attitudes towards adult learning and CVET within Member States and across the EU; the second considers the views of different groups within the European adult labour force.

The survey brings new insights into the important issue of participation in adult learning and CVET, which remains persistently below expected levels despite considerable changes taking place in labour markets. A concern was that people do not participate because they hold adult training and CVET in low esteem.

The survey clearly shows that this is not the case and, at least in general terms, people in all Member States value adult learning and CVET. They regard them as important and associate them with real practical benefits, such as finding a job, career progression and personal development.

Importantly, people in all Member States believe that adult learning and CVET will become more important over the next 10 years and should be a priority for investment in their country. While there are different perceptions about the quality of and access to adult learning and CVET in different countries, it makes little difference to the importance they attach to them.

The data are here to explore. The aim is that a better understanding of the perceived strengths and weaknesses of their systems will inform Member State strategies to strengthen adult learning and CVET. The next step is to consider how to build on the positive image of adult learning and CVET and ensure that people continue to regard them as valuable.

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Executive summary

Managing the challenges of technical advance and the shift to a green economy requires the best human capital; not a small elite, but a thoroughly well-trained general workforce operating efficiently and effectively at all levels. A workforce whose skills are constantly developed and used.

Adult learning and continuing vocational education and training (CVET) are essential to developing such a workforce. They are central to lifelong learning; they enable adults to acquire the knowledge, skills and competences they need to manage changing jobs and lives. They also support employment, competitiveness and innovation ⁽¹⁾.

However, as Cedefop's first opinion survey ⁽²⁾ showed, people often see adult learning and CVET as less attractive learning options than general education. But while the first opinion survey gave insights into comparisons between general education and vocational education and training, we know little about the image people have of adult learning and CVET. We know little about the extent to which people think that adult learning and CVET are important for life and work; whether people believe that they bring tangible benefits or that there are opportunities for them to learn and, if so, what stops them from taking those opportunities. To find out more, Cedefop launched this second opinion survey.

Image is important. Knowing more about people's perceptions can help Member States identify the strengths and weaknesses of their systems and can inform their strategies to improve adult learning and CVET and increase participation.

Monitoring and raising participation in adult learning and CVET have been on the European agenda for more than 20 years. However, various measures show that in many Member States levels of participation are not in the desired range. European averages also mask big differences between

⁽¹⁾ See Cedefop's work on adult education and CVET:
www.cedefop.europa.eu/en/events-and-projects/projects/adult-learning

⁽²⁾ Cedefop (2017). *Cedefop European public opinion survey on vocational education and training*. Luxembourg: Publications Office. Cedefop research paper; No 62.
www.cedefop.europa.eu/en/publications-and-resources/publications/5562

countries. And if Europe is to have the workforce it needs, more adults need to learn new and more skills.

About the survey

To find out how people perceive adult learning and CVET, Cedefop's second opinion survey comprised 40 466 telephone interviews (landline and mobile) of adults, aged 25 and over who live in the European Union (EU), Iceland and Norway. The interviews were carried out between May and July 2019. The survey findings are presented in two volumes. This first volume examines perceptions in Member States ⁽³⁾. The second considers perceptions and image among the demographic and socioeconomic groups (gender, age, economic status, occupation, education, migration background) across the whole EU.

The survey methodology defines adult learning and CVET as 'any learning activities undertaken by adults (whether employed or not) with the intention of improving knowledge or skills'. Image is the perceived value of adult learning and CVET in producing desired outcomes for individuals (such as personal, skill and career development and personal financial situation), society and the economy (such as lower unemployment) and benefits for countries (such as social cohesion). The questionnaire asked about perceptions of the image of adult learning and CVET in relation to delivering these outcomes. Based on these replies the image of adult learning and CVET was constructed.

A positive image

Respondents in all Member States have a positive image of adult learning and CVET. In all Member States respondents strongly believe that learning throughout life is important for their personal development and work. At least two-thirds of respondents in each country agree that adult learning and CVET should be an investment priority. This positive image is also likely to last. In every country, at least 70% of respondents say that adult learning and CVET will be more important, particularly for career progression, in 10 years' time.

⁽³⁾ The term 'Member States' in this publication includes the 28 EU Member States at the time of the survey and Iceland and Norway.

The positive image of adult learning and CVET is also coherent and consistent, being closely linked to the benefits people expect to receive from them. Respondents who took part in learning in the past year were asked why. Across Member States, the two most common reasons given for participating in adult learning and CVET were personal development and to improve job skills.

People also perceive the benefits of adult learning and CVET to be real. Some 96% of respondents agree that adult learning and CVET are important for personal development. In a sign that systems are becoming more flexible, 78% of respondents also agree that there are many ways for adults to obtain a state-recognised degree.

There is also widespread agreement in Member States about the employment-related benefits of adult education and CVET. These benefits are regarded as important for: career progression; finding a new job; obtaining a better income; and reducing unemployment. Some 84% of respondents also agree that organised work-related training is important to develop skills for any job. In all Member States except Italy, respondents are more likely to describe adult learning and CVET as good rather than bad.

However, in all Member States people see employment-related and personal benefits of adult learning and CVET as greater than educational benefits. Adult learning and CVET are not regarded as important as school or university education, nor are they readily regarded as a route to obtain a traditional university or college degree.

The positive image of adult learning and CVET extends to perceptions of availability and access. Overall, information in Member States about adult learning and CVET opportunities is good; most agree that their country has many opportunities and people are aware of them. The internet is the best source of advice about adult learning and CVET in all countries except Romania, where professional or sector associations come first. The survey indicates that the internet is used as a first contact point and to filter information and that different information sources are combined in different ways across Member States.

Positive views of adult learning and CVET also appear deeply held and widely shared. They are reinforced by family and friends, who are major supporters of decisions to participate. In almost every country, respondents identify family and friends as the principal source of support to participate in adult learning and CVET.

In 22 countries, the reason respondents give most frequently for not taking part in organised training is that they feel they do not need it. Exceptions

are Bulgaria, Ireland, Greece, Spain and Malta, where the main reason for not participating is problems with time, and in France and Romania where it is feeling too old. There is widespread support for measures proposed to encourage participation in adult learning and CVET: better information; improving quality; financial incentives; flexible learning arrangements; adapting learning to individual needs; help with caring responsibilities; and certification and recognition of learning.

Unsurprisingly, there are differences in emphasis between countries. Overall, respondents are particularly positive about the benefits of adult learning and CVET in Greece, Cyprus, Malta, Romania but less so in Estonia, Croatia and Italy. Views on different aspects of adult learning and CVET also vary. In Malta and Romania, respondents are positive about quality, availability of opportunities and access. Respondents in Sweden are positive about availability and quality; Ireland is also positive about quality.

Those in Spain, France and Italy are, relatively, negative about access to and availability of adult learning and CVET. In Greece, too, positive views about learning in general are offset by criticisms of access and availability. In Italy, Latvia and Lithuania respondents are critical about quality. Iceland is least positive about access to work-related training.

Exceptions to family and friends being the principal source of support to participate in adult learning and CVET are: the Netherlands, Norway and the UK, where an employer is regarded as most likely to offer support; France, where it is professional or sector associations; and Luxembourg, where government is the most frequent response.

However, it is important to note that the main differences between 'positive' and 'less positive' occur because fewer people 'totally agree' rather than 'simply agree'. Although seemingly slight, these differences are important. It is unsurprising that, generally, people see adult learning and CVET as 'good things'. The survey, however, brings out relative differences and relative strengths and weaknesses for Member States to consider. It is also important to note that the survey findings are about perceptions; the image may not reflect the reality, in which case misconceptions need to be corrected.

Image and incentive

A concern is that participation in adult learning and VET remains persistently below expected levels because people hold adult training and CVET in low esteem. However, irrespective of any need to strengthen measures to encourage participation, the survey clearly shows that concerns about not enough people taking part in adult learning and CVET are not because people have a negative image about them.

The survey clearly shows that people value adult learning and CVET, and that they regard them as important, associating them with real practical benefits.

According to the survey, the main reason people do not participate in adult learning and CVET is because they 'see no need'. This is despite nearly nine out of 10 respondents, who were in work when surveyed, saying that their job requires them to keep their skills constantly up to date, 28% of respondents in work saying that they lack some technical skills and 23% saying they lack some general skills to carry out their job at the required level.

However, the survey strongly indicates that 'seeing no need' for adult learning and CVET is not because people have a negative image about them. Adult learning and CVET may not quite have the same status as tertiary education, but they are highly valued, at least in general terms. They are increasingly seen as a necessity. However, this 'necessity' is seen in general, abstract terms. It can be expressed as people recognising a general need for adult learning and CVET, but they are not necessarily a need for 'me', at least not at this moment.

Consequently, the issue of attractiveness of and participation in adult learning and CVET would appear to be not lack of esteem, but of incentive.

The various benefits of adult learning and CVET are interrelated. Learning motivated for personal development can improve career prospects and vice versa. However, incentive to participate depends on the likelihood of the desired benefits being realised. The benefits of participating in adult learning and CVET for personal development are defined by the individual and outcomes are in their control. However, although people see adult learning and CVET as helping career progression, job search and better incomes, realising these benefits is generally not in the hands of participants or governments, but of employers. Government measures can encourage people to participate in adult learning and CVET. Such measures are needed but they do not guarantee a job, promotion or a pay rise.

Governments have more control of certification and recognition of adult learning and CVET. Certification and recognition can be an incentive for learning for personal development and for employment; skills that are certified and visible have more currency on the labour market.

The survey shows high levels of support in all Member States for each measure to encourage people to participate in adult learning and CVET. These high levels of support indicate that there is scope for Member States to introduce, widen access to, or raise awareness of them. However, in addition to these measures, in European policy terms, there is a strong argument that government measures to encourage participation need also to be linked, not with abstract notions of some general good or deferred reward, but with tangible benefits such as a job or a qualification, or both.

Further, the attractiveness of adult learning and CVET is not only about people's willingness to participate, but also employers' willingness to invest. Employers across Europe say they have difficulties finding the skills they need. However, the impact of technological change on job tasks is creating a tension in adult learning and VET over the balance between the core skills, which employers say they want, and the job-specific skills that employers expect CVET, in particular, to provide. More opportunities for work-based learning for adults may not only increase participation, but also help resolve that tension.

CHAPTER 1.

About the survey

This chapter outlines the survey background, its rationale and briefly outlines its methodology.

1.1. Policy background

Cedefop's first opinion survey showed, overall, that people often see adult learning and continuing vocational education and training (CVET) as less attractive learning options than general education ⁽⁴⁾. But while the first opinion survey gave insights into comparisons between general education and vocational education and training, we know little about the image people have of adult learning and CVET.

We know little about the extent to which people think that adult learning and CVET are important for life and work; whether people believe that they bring tangible benefits or that there are opportunities for them to learn and, if so, what stops them from taking those opportunities. To find out more, Cedefop launched this second opinion survey.

Understanding such perceptions is important. Adult learning and CVET are essential aspects of lifelong learning ⁽⁵⁾. They help adults acquire the knowledge, skills and competences they need to manage changing jobs and lives. They also support employment, competitiveness and innovation.

Despite their importance, only a handful of Member States meet the EU's target of 15% of adults participating in lifelong learning. The target is not new. For more than 10 years the EU has struggled to meet it; the EU average in 2019 was 11.1% ⁽⁶⁾.

⁽⁴⁾ Cedefop (2017). *Cedefop European public opinion survey on vocational education and training*. Luxembourg: Publications Office. Cedefop research paper; No 62.

www.cedefop.europa.eu/en/publications-and-resources/publications/5562

⁽⁵⁾ See Cedefop's work on adult learning and CVET:

www.cedefop.europa.eu/en/events-and-projects/projects/adult-learning

⁽⁶⁾ The indicator measures the share of people aged 25 to 64 who stated that they received formal or non-formal education and training in the four weeks preceding the survey (numerator) and is based on the EU labour force survey. <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20190517-1>

The consensus is that levels of participation are not in the desired range. European averages also mask big differences between countries. Recognising this, the Council resolution on a renewed European agenda for adult learning of 2011 ⁽⁷⁾ highlighted the need to increase adult participation in formal, non-formal and informal learning significantly to develop work skills and support active citizenship, personal development and fulfilment.

In addition, the Council recommendation on upskilling pathways of 2016 ⁽⁸⁾ called on Member States to improve access to quality learning opportunities for low-skilled adults through coordinated approaches, including skills assessment, offers of learning tailored to individual needs and validation of skills acquired.

Knowing more about the image people have of adult learning and CVET can help Member States identify the perceived strengths and weaknesses of their systems and inform strategies for increasing participation.

The survey's findings are presented in two volumes. This first volume examines perceptions and image of adult learning and CVET in Member States ⁽⁹⁾. The second considers perceptions and image among the demographic and socioeconomic groups (gender, age, economic status, occupation, education, migration background) that make up Europe's adult labour force.

1.2. Methodology

Cedefop's second opinion survey comprised 40 466 telephone interviews (landline and mobile) with adults aged 25 and over who live in the EU Member States, Iceland and Norway. Interviews were carried out between May and July 2019. The Annex details the survey methodology, but it is helpful to note some key points about it.

⁽⁷⁾ Council of the European Union (2011). Council resolution on a renewed European agenda for adult learning. *Official Journal of the European Union*, C 372, 20.12.2011, pp. 1-6.

[https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32011G1220\(01\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32011G1220(01)&from=EN)

⁽⁸⁾ Council of the European Union (2016). Council recommendation on upskilling pathways: new opportunities for adults. *Official Journal of the European Union*, C 484, 24.12.2016, pp. 1-6.

[https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224\(01\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224(01)&from=EN)

⁽⁹⁾ The term 'Member States' in this publication includes the EU-28 Member States at the time of the survey and Iceland and Norway.

First, the survey defines adult learning and CVET as ‘any learning activities undertaken by adults (whether employed or not) with the intention of improving knowledge or skills’.

Second, the concept of image is the perceived value of adult learning and CVET in producing desired outcomes for individuals (such as personal, skill and career development and personal financial situation), society and the economy (such as lower unemployment) and benefits for countries (such as social cohesion).

Third, the core of the questionnaire asked about perceptions of the image of adult learning and CVET in relation to delivering these outcomes. It also discussed reasons for participating and not participating, work-organised training activities, and the skills respondents need for their current jobs. Finally, an image of adult learning and CVET and its different aspects is constructed from these perceptions.

Chapter 2 of this report reviews the survey results about how important people perceive adult learning and CVET to be. It looks at respondents’ views about learning and why they want to learn.

Chapter 3 considers perceptions of the benefits of adult learning and CVET. It looks first at the employment-related benefits and then considers perceptions of the role of adult learning and CVET in personal development and further educational attainment. It concludes with a brief review of respondents’ answers about the quality of VET in their countries.

Chapter 4 looks at perceptions about access to adult learning and CVET. It considers how people view the opportunities for adult learning and CVET in their country, how well-informed they feel about them and how good the guidance and support available is to those wanting to participate. The chapter examines respondents’ reasons for not participating in adult learning and CVET and concludes by presenting views on measures to encourage participation.

Chapter 5 outlines observations on the perceived importance and benefits of adult learning and CVET as well as access to them. It also discusses some key findings about their image from the survey data.

CHAPTER 2.

Perceptions: importance

The survey shows that adult learning and continuing vocational education and training (CVET) have a positive image. They are regarded as important for work and life in all Member States.

This chapter discusses the extent to which Member States see adult learning and CVET as important and the reasons why people take part in them. Section 4.3, in the context of access, considers why adults do not participate in adult learning and CVET and what measures may encourage them to do so.

In all Member States, respondents are convinced of the importance of learning throughout life. They anticipate adult learning and CVET becoming more important over the next 10 years and there is strong support in all countries for governments to prioritise investment in adult learning and CVET.

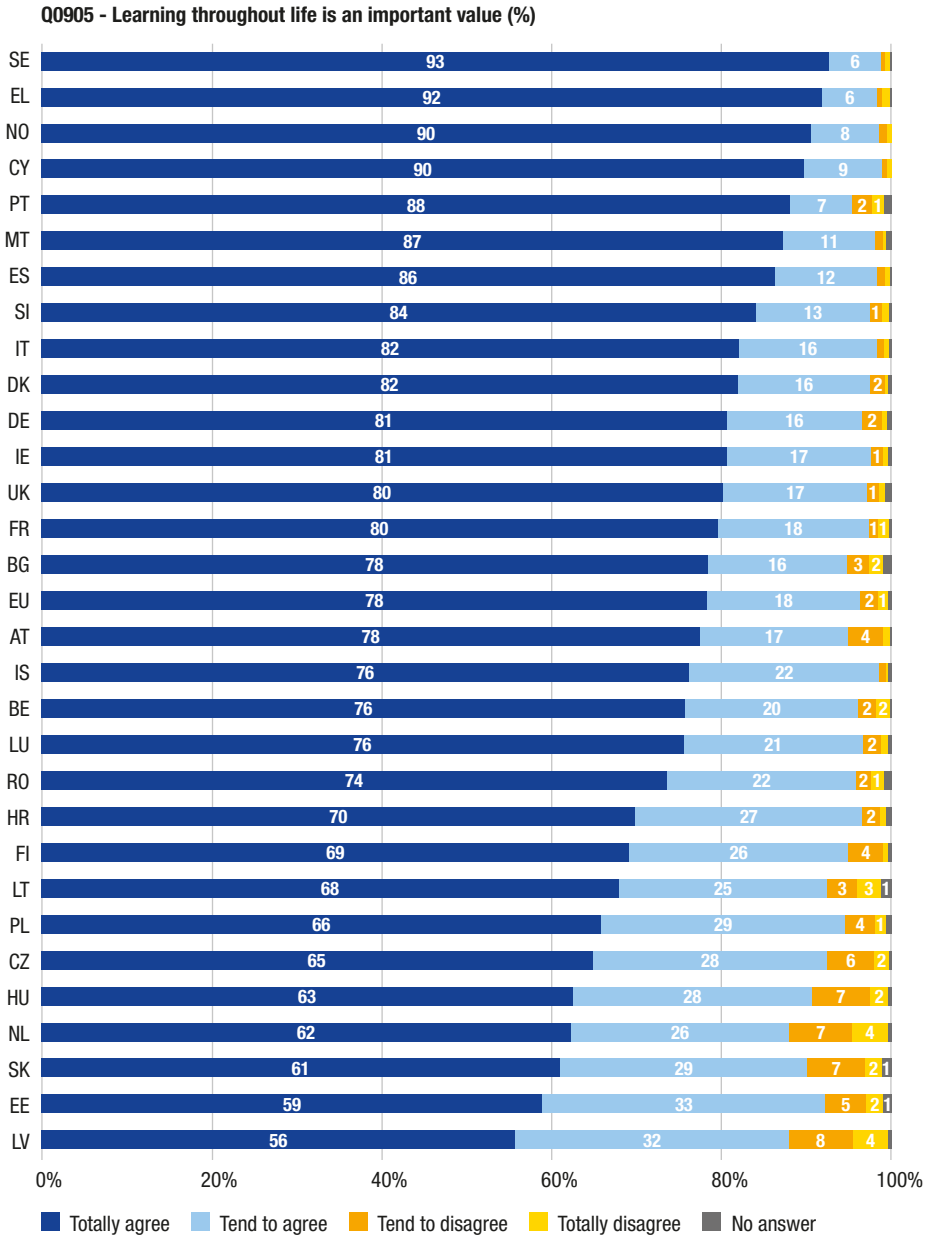
People have various reasons for taking part in adult learning and CVET but the main ones, in all Member States, are personal development and to improve job skills. These reasons apply to organised formal and non-formal learning as well as to informal learning done on one's own. Although personal development is the main reason people take part in adult learning and CVET, many emphasise the importance of job-related learning. In all Member States, to varying degrees, respondents say that skill needs in their jobs are changing constantly and that they lack technical and general skills.

2.1. Value

Almost all respondents (96%) agree that continuing to learn throughout life is important (Figure 1). At least 90% of respondents agree in every country, except Latvia (88%) and the Netherlands (89%).

There is also a clear expectation that adult learning and CVET will become more important in enabling people to progress in their careers (Figure 2). Overall, 84% of respondents (39% say definitely; 45% probably) say that adult learning and CVET will be more important for career progression in 10 years' time. More than half of respondents say that it will 'definitely' be more important in Malta (68%), Cyprus (54%) and Ireland (53%).

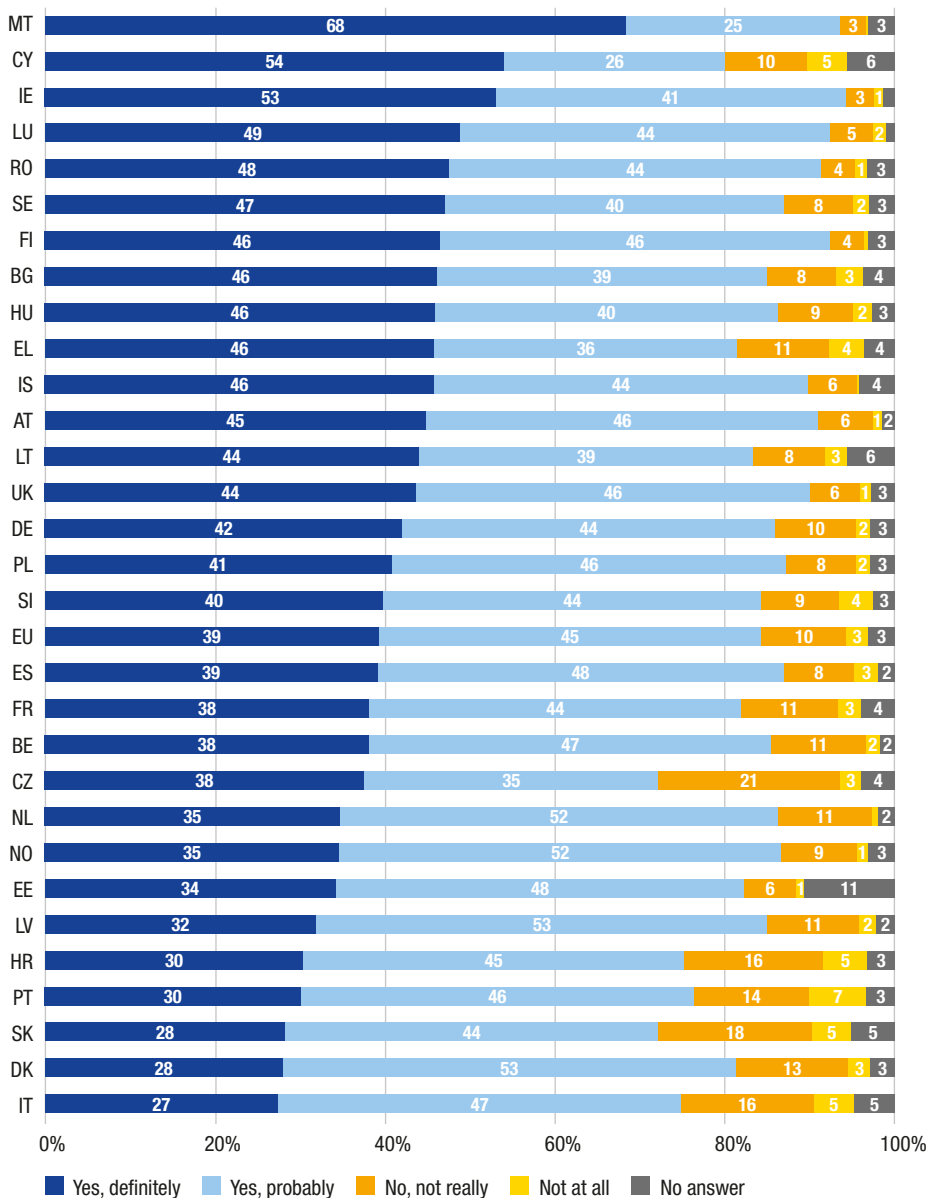
Figure 1. Importance: learning throughout life is important, country (EU-28, Iceland and Norway)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 2. Importance: adult learning and career progression, country (EU-28, Iceland and Norway)

Q1500 - Adult learning will be more important in ten years (%)



Source: Cedefop opinion survey on adult learning and CVET.

The highest proportions of respondents who are not convinced of the increasing importance of adult learning and CVET are in Czechia (24%), Slovakia (23%), Croatia, Italy and Portugal (all 21%).

Some 89% of respondents 'totally agree' or 'agree' (55% totally agree; 34% agree) that governments should prioritise investment in learning for adults (Figure 3). In every country, at least two-thirds of respondents agree their government should prioritise investment in learning for adults. The highest numbers of those who 'totally agree' are in Malta (79%), Romania (75%), Greece and Cyprus (both 72%). Respondents in Iceland (27%) and Estonia (24%) are most likely to disagree.

2.2. Why adults learn

Across the EU-28 Member States, given the option of multiple answers, the two most common reasons respondents gave for taking part in organised training (Table 1) are personal development (66%) and to improve job skills (64%).

Respondents also mention improving basic skills (34%) and computer skills (20%). Sometimes respondents link improving job skills with specific work-related reasons such as promotion or better pay (16%), a new or different job (14%) or to set up a business (6%). Some 22% participated because the training was mandatory.

Respondents in Czechia (83%) are most likely to give personal development as the main reason for taking part in organised training, followed by Belgium (81%), Germany (77%) and the UK (75%). Improving job skills is the main reason given in Luxembourg, Iceland (both 75%), France (67%) and Bulgaria (65%). Improving basic skills is important in Belgium (53%), Denmark (52%), Iceland (50%), Austria (48%) and Luxembourg (47%).

A relatively high proportion of respondents participated in organised training activities in the UK (33%, compared to the European average of 22%) and Norway (28%) because it was mandatory. Greece (7%) has fewest respondents saying that they participated in an organised training activity because it was mandatory.

When given the option of multiple answers, personal development (81%) was also the most common reason respondents in the EU-28 Member States gave for participating in informal learning (learning on their own), followed by improving job skills (49%), basic skills (35%) and computer skills (21%) (Table 2). Most respondents gave personal development as the main reason in every country, notably in Czechia (91%), Belgium (89%), Luxembourg (88%) and Germany and the Netherlands (both 87%).

Table 1. Importance: reasons for taking part in organised training, country (EU-28, Iceland and Norway)

Q1811 Q1821	For personal development (12)	To improve your job skills (11)	To improve your basic skills (13)	It was mandatory (18)
EU-28	66	64	34	22
BE	81	70	53	21
BG	53	65	30	14
CZ	83	75	34	20
DK	55	69	52	29
DE	77	76	42	19
EE	48	60	14	13
IE	70	68	41	31
EL	60	57	28	7
ES	68	58	43	14
FR	59	67	32	24
HR	55	49	25	20
IT	51	49	23	21
CY	45	45	30	16
LV	55	61	26	19
LT	49	48	12	20
LU	69	75	47	27
HU	51	60	19	26
MT	41	43	31	17
NL	70	68	28	26
AT	73	72	48	15
PL	65	61	24	18
PT	62	72	41	15
RO	42	70	27	17
SI	67	51	38	22
SK	44	44	18	26
FI	62	62	19	16
SE	63	61	29	23
UK	75	63	34	33
IS	64	75	50	21
NO	51	56	37	28

Source: Cedefop opinion survey on adult learning and CVET.

To improve your computer skills (14)	To get promotion or better pay (15)	To get a new or different job (16)	To set up a business (17)
20	16	14	6
30	15	16	6
18	21	11	6
29	22	19	5
9	11	15	4
24	23	16	7
7	6	7	2
28	24	16	7
20	10	13	5
28	11	16	6
20	12	14	6
19	14	12	7
9	3	6	2
12	9	9	4
14	15	13	7
8	8	5	3
27	18	14	8
11	14	10	5
14	20	11	2
13	13	15	4
23	23	15	11
19	21	12	4
24	13	10	2
31	22	12	8
20	18	11	4
14	13	11	4
14	6	14	3
12	12	9	2
17	21	18	8
27	15	11	5
13	9	11	5

Table 2. Importance: reasons for taking part in informal training, country (EU-28, Iceland and Norway)

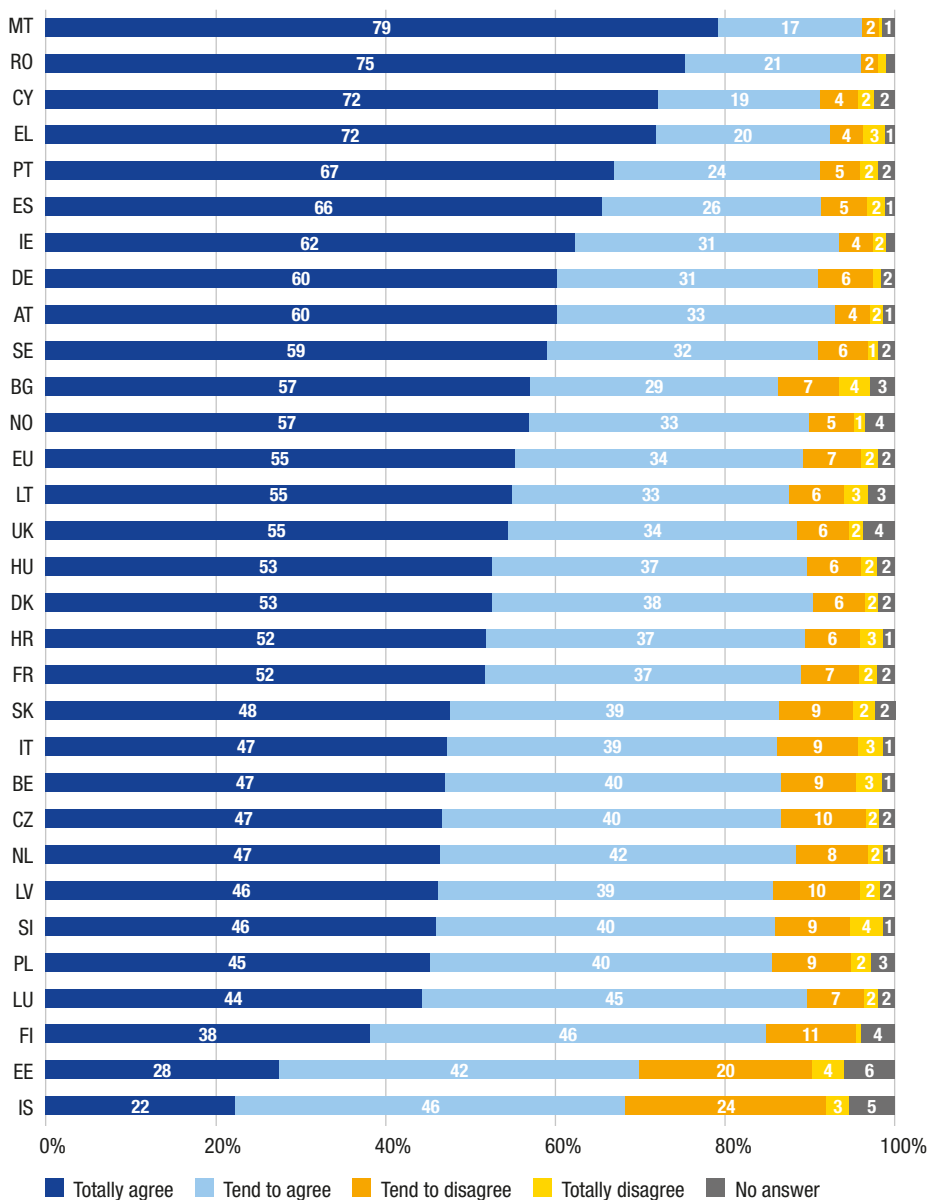
Q1851 Q1860	For personal development (02)	To improve your job skills (01)	To improve your basic skills (03)
EU-28	81	49	35
BE	89	53	47
BG	74	45	28
CZ	91	61	40
DK	68	55	55
DE	87	59	44
EE	72	44	13
IE	83	52	36
EL	76	43	26
ES	80	45	44
FR	83	48	34
HR	73	43	26
IT	72	29	24
CY	53	42	27
LV	75	46	24
LT	74	38	9
LU	88	52	51
HU	76	38	23
MT	51	32	33
NL	87	53	30
AT	77	58	50
PL	82	47	26
PT	74	62	43
RO	61	60	31
SI	79	44	39
SK	66	39	25
FI	78	48	29
SE	82	43	31
UK	85	46	33
IS	77	67	55
NO	65	46	42

Source: Cedefop opinion survey on adult learning and CVET.

To improve your computer skills (04)	To get a promotion or better pay (05)	To get a new or different job (06)	To set up a business (07)
21	11	11	6
32	10	13	8
18	13	8	4
29	17	16	5
13	8	11	6
26	14	12	5
9	5	6	5
27	16	14	11
18	8	10	5
29	9	14	6
21	8	11	7
17	12	9	10
8	1	4	2
16	9	7	6
15	10	10	7
7	6	6	6
29	14	12	6
15	9	7	3
10	12	8	1
17	9	11	6
23	13	10	10
20	15	10	5
24	10	10	4
33	15	12	8
23	12	10	5
17	9	10	5
15	4	14	3
14	8	6	3
16	16	16	9
27	9	10	6
18	5	8	7

Figure 3. Importance: governments should prioritise investment in adult learning and CVET, country (EU-28, Iceland and Norway)

Q0907 - The government should prioritise investment in adult learning (%)



Source: Cedefop opinion survey on adult learning and CVET.

Respondents in Iceland (67%) are most likely to say that they took part in learning on their own to improve their job skills, followed by Portugal (62%), Czechia (61%) and Romania (60%). Less than a third of respondents give this reason in Italy (29%) and Malta (32%).

At least half of respondents took part in learning on their own to improve their basic skills in Denmark and Iceland (both 55%), Luxembourg (51%) and Austria (50%). In contrast, few respondents in Lithuania (9%) and Estonia (13%) give this reason.

2.2.1. Changing needs: job-related skills

Although personal development is the main reason for taking part in organised learning and learning on one's own, the survey also gives insights into the importance of job-related learning to keep skills up to date (Figure 4).

Significantly, 88% of all respondents who were in work at the time of the survey agree that their job requires them to keep their skills constantly up to date, including 63% who totally agree.

Respondents in Sweden and Norway (both 80%) are most likely to totally agree that their job requires them to keep their skills constantly up to date, followed by Czechia and Malta (both 73%), Slovenia (72%), Hungary (71%) and Germany and Estonia (both 70%). The highest level of disagreement is in Cyprus (18%) and Estonia and Slovakia (both 17%). Further, 28% of all respondents in work agree that they lack some technical skills to carry out their job at the required level, including 9% who totally agree (Figure 5).

Portugal is the only country where respondents are more likely to agree (51%) than disagree (47%) that they lack some technical skills to carry out their job. However, a significant proportion of respondents agree that they lack required technical skills in Greece (47%), Cyprus (46%), Luxembourg (45%), Romania (43%) and Bulgaria (42%).

In contrast, most respondents disagree that they lack required technical skills in Italy (92%), Iceland (88%), Finland (85%) and Slovenia (84%).

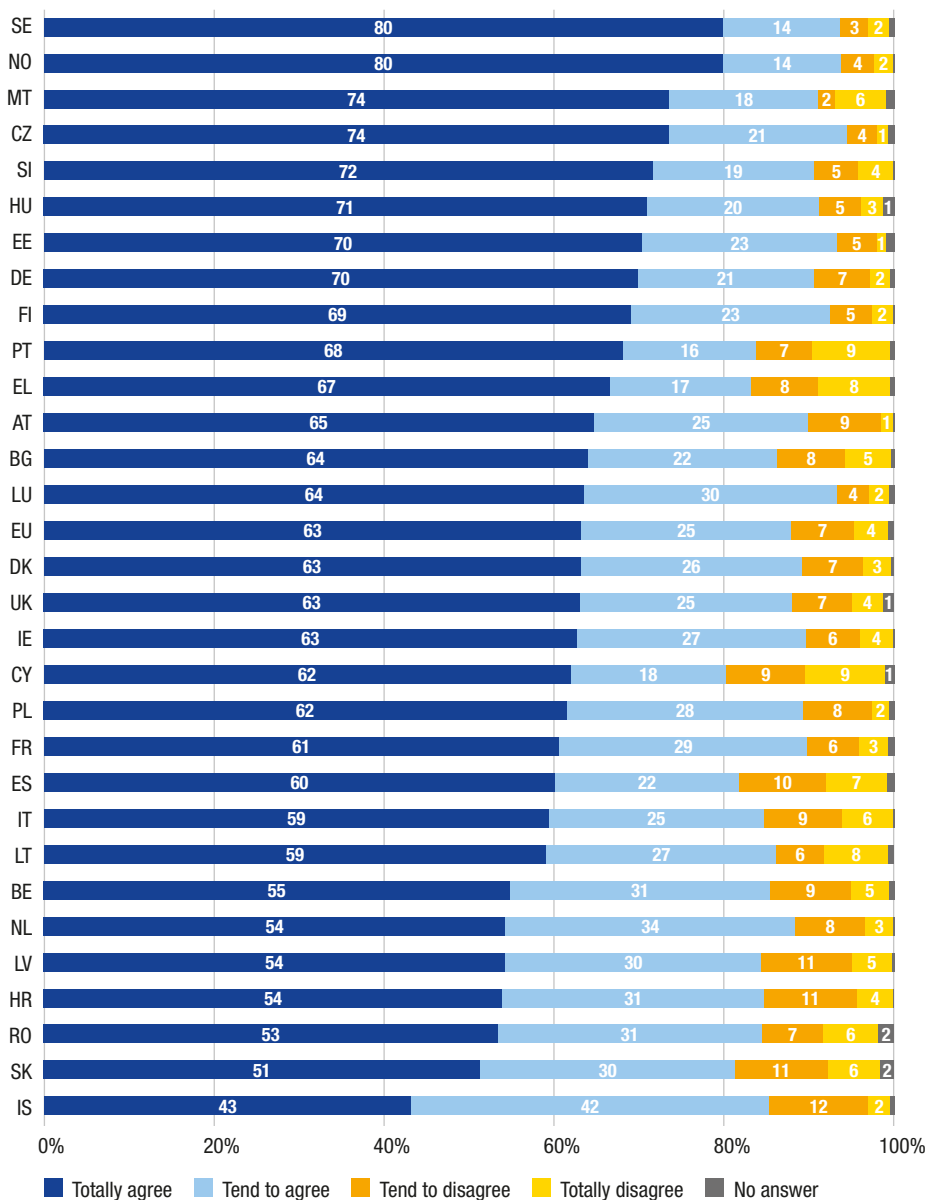
Some 22% of respondents in work agree that they lack some general skills to carry out their job at the required level, including 8% who totally agree (Figure 6).

Portugal is again the only country where respondents are more likely to agree (52%) than disagree (47%) that they lack general skills, followed by Spain (43%), Cyprus and Luxembourg (both 40%).

Respondents are most likely to disagree that they lack required general skills in Finland (91%), Iceland (91%), Italy (88%), Germany (84%), Poland (82%) and Norway and Sweden (both 81%).

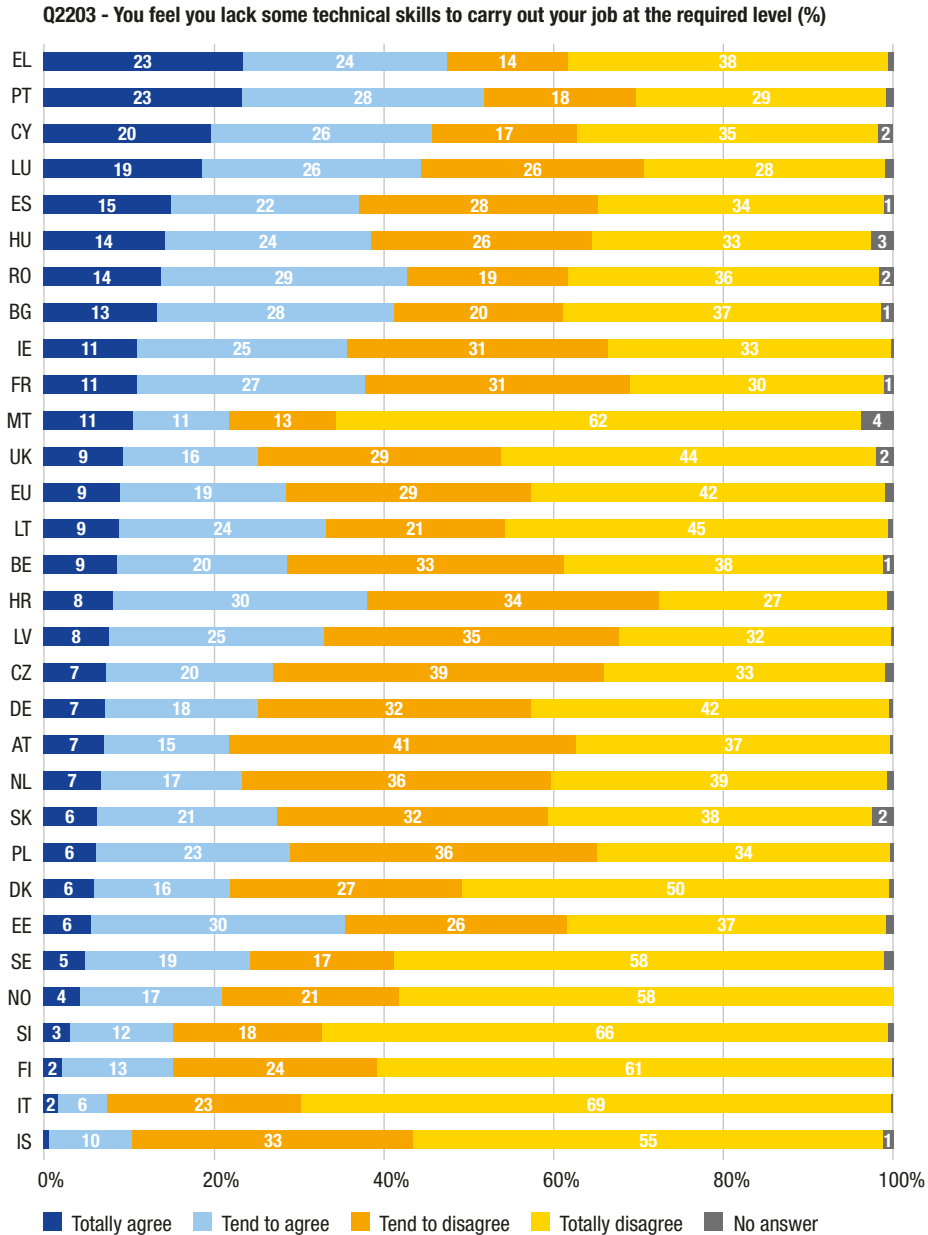
Figure 4. **Importance: job requirements - keeping skills up to date, country (EU-28, Iceland and Norway)**

Q2201 - Your job requires you to keep your skills constantly up to date (%)



Source: Cedefop opinion survey on adult learning and CVET.

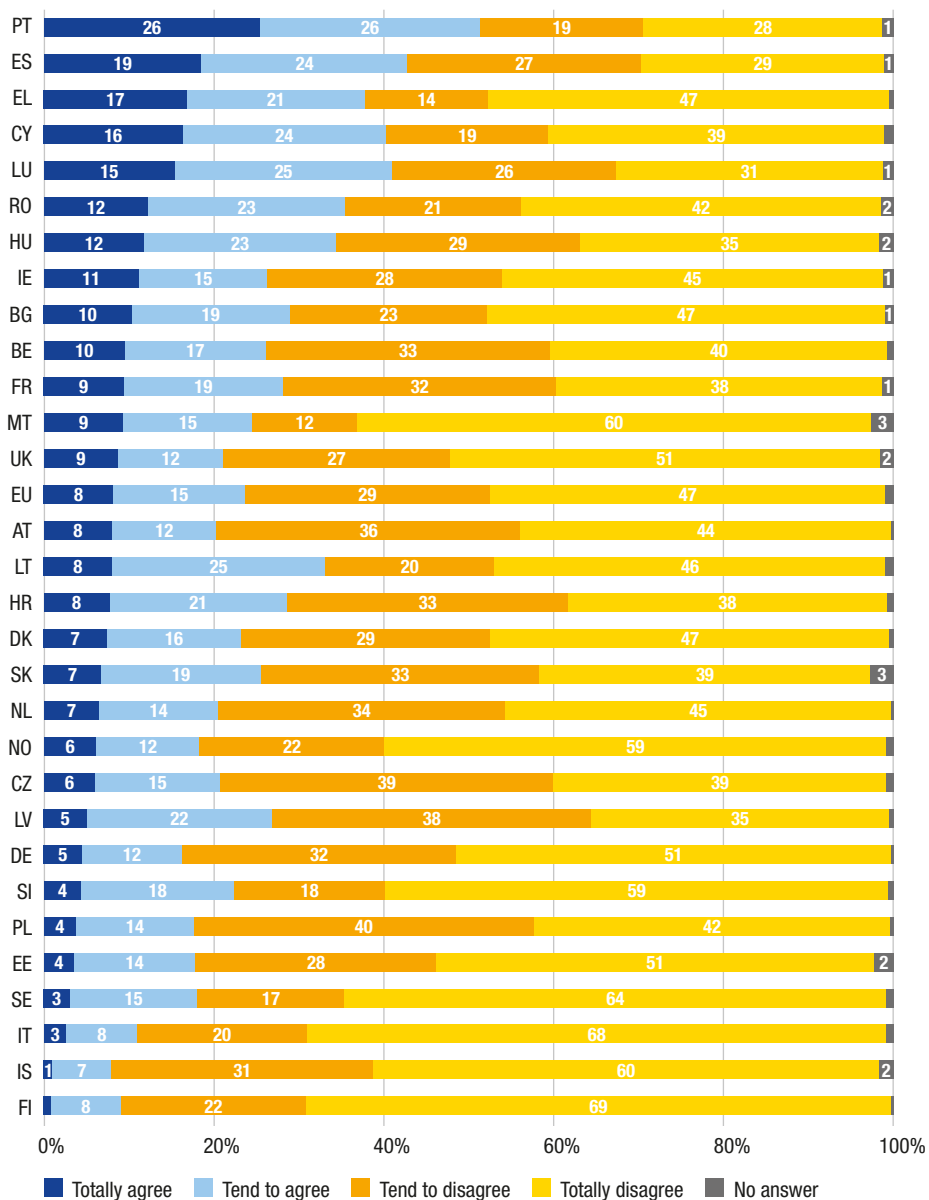
Figure 5. Importance: lack of technical skills, country (EU-28, Iceland and Norway)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 6. **Importance: lack of general skills, country (EU-28, Iceland and Norway)**

Q2204 - You feel you lack some general skills to carry out your job at the required level (%)



Source: Cedefop opinion survey on adult learning and CVET.

CHAPTER 3.

Perceptions: benefits

The survey shows that the provision of adult learning and continuing vocational education and training (CVET) in Member States has a positive image and is seen as bringing benefits to individuals, the economy and society.

This chapter discusses the extent to which adult learning and CVET in Member States is perceived to bring employment-related and personal benefits.

Member States' provision of adult education and CVET is seen as influential in supporting different aspects of career progression, including finding a new job and obtaining better incomes and, more generally, in reducing unemployment. Adult education and CVET are also regarded as important for personal development and further educational attainment.

In all Member States, people see adult learning and CVET as being of greater benefit to employment-related and personal issues than to education. Adult learning and CVET are not regarded as important as school or university education, or immediately seen as a route to obtaining a traditional university or college degree.

Overall, the quality of provision in Member States is regarded as good. However, there are differences between Member States and the survey indicates some room for improvement.

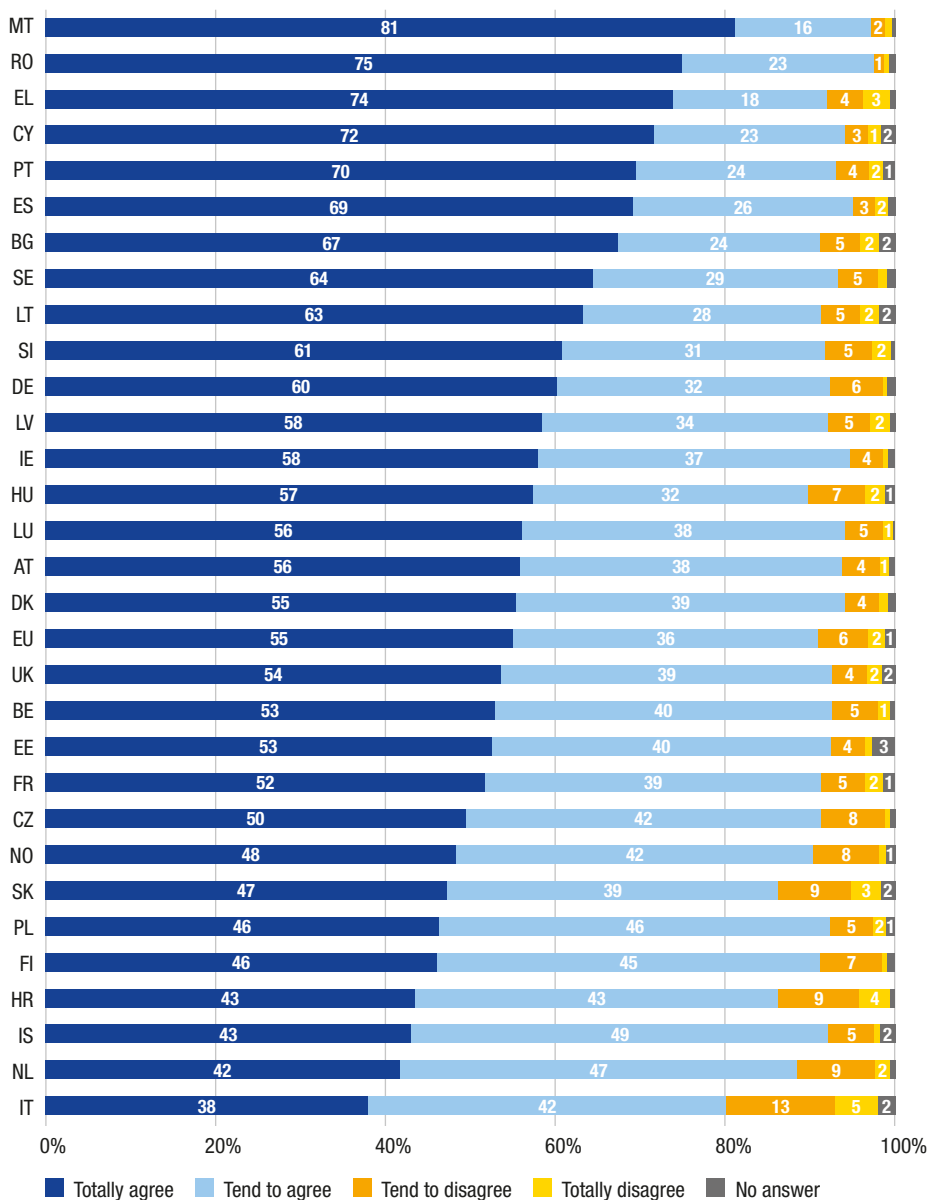
3.1. Career progression and reducing unemployment

Agreement is widespread that adult learning and CVET provision in Member States is important to career progression (Figure 7). In 22 countries, at least half of respondents totally agree, particularly in Malta (81%), Romania (75%), Greece (74%) and Cyprus (72%). Italy registers the highest level of disagreement (18%), followed by Croatia (13%) and Slovakia (12%).

In 14 countries, more than half of respondents totally agree that adult learning and CVET can be a route to a better income (Figure 8), particularly in Malta (78%), Romania (74%) and Bulgaria (65%).

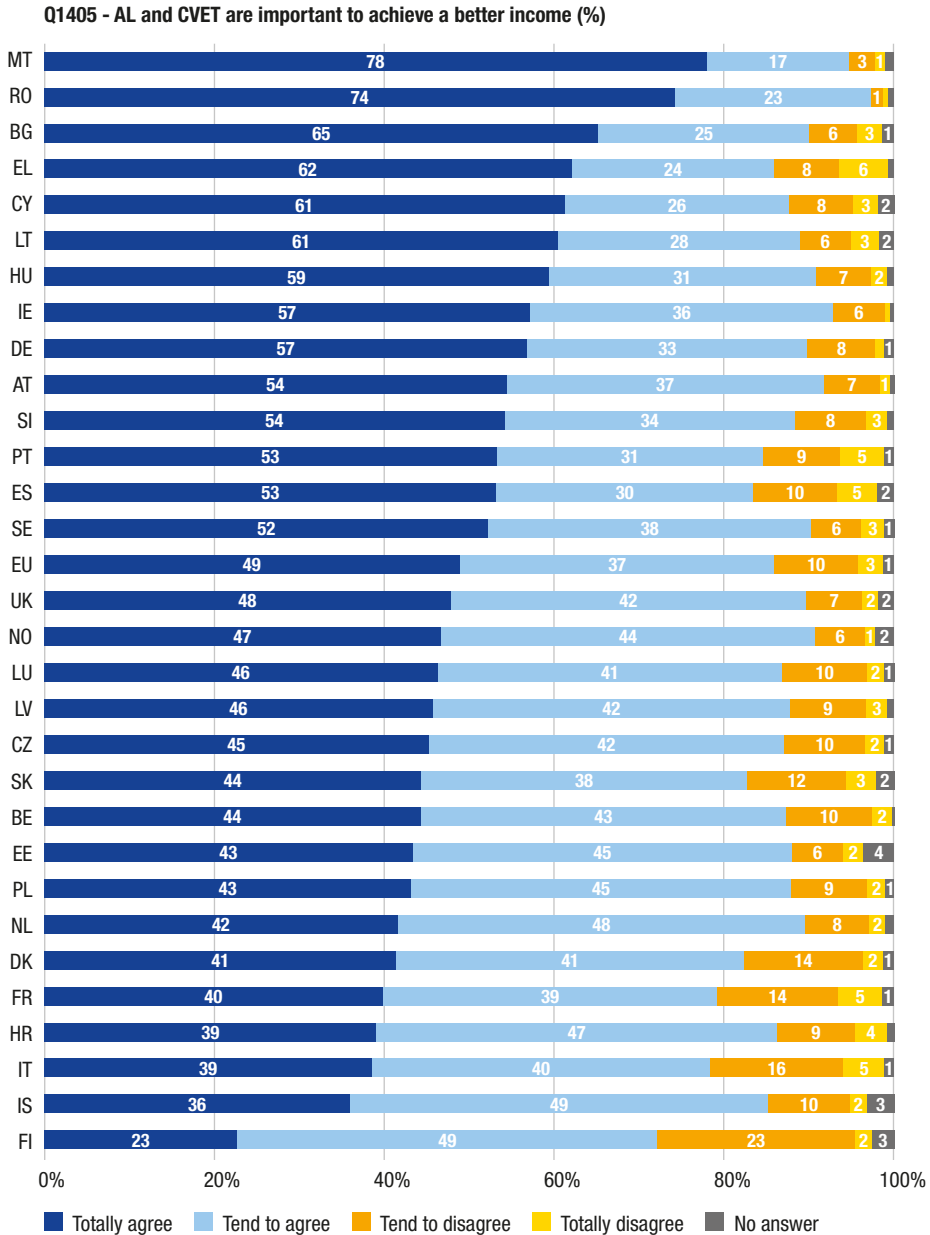
Figure 7. **Benefits: career progression, country (EU-28, Iceland and Norway)**

Q1404 - AL and CVET are important to progress in a career (%)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 8. **Benefits: a better income, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

Some 91% of all respondents agree, including 55% who totally agree that adult learning and CVET are important when looking for a new job (Figure 9). Respondents are most likely to totally agree in Malta (78%), Romania (74%) and Greece (70%). Most respondents are least likely to ‘totally agree’ in Iceland (39%), Denmark (42%), Croatia (43%) and Iceland (39%). Denmark (13%) is the only country where more than one in 10 respondents disagree that adult learning and CVET are important when looking for a new job.

In 23 countries, at least half of respondents totally agree that adult learning and CVET are important for reducing unemployment (Figure 10). Respondents are most likely to totally agree in Malta and Romania (both 71%), Sweden (68%) and Norway (66%). Respondents are most likely to disagree in Italy (22%) and Greece (20%), countries with relatively high levels of unemployment ⁽¹⁰⁾.

3.1.1. Work-related training and career progression

Some 84% of all respondents agree (44% totally agree) that organised work-related activities are important for developing skills for any job (Figure 11). Respondents totally agree notably in Malta (72%), Greece (63%), Norway (62%) and Romania (58%). Respondents in Estonia and Italy (both 21%) register the highest levels of disagreement.

3.2. Personal development and educational attainment

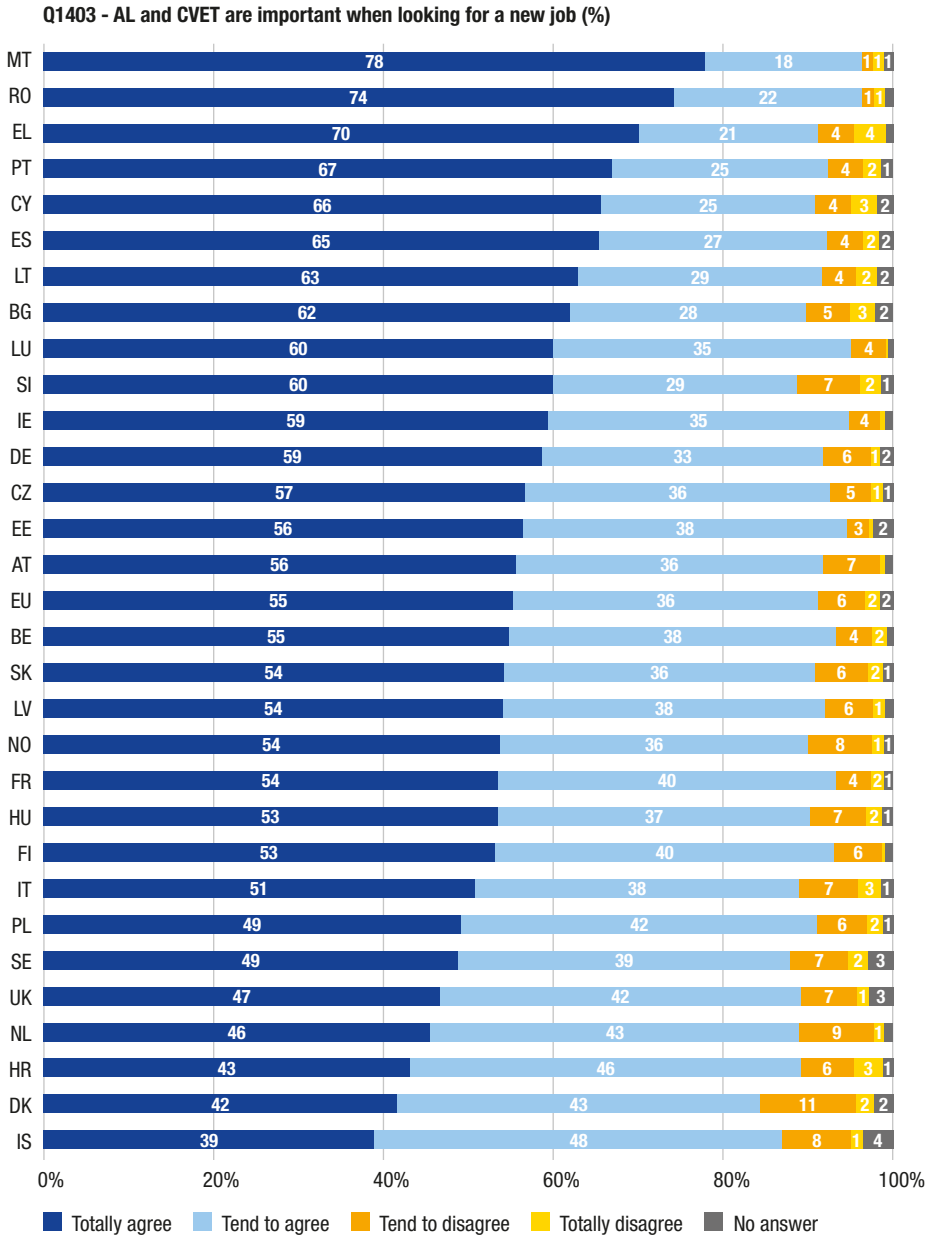
3.2.1. Personal development

Some 70% of all respondents totally agree that adult learning and CVET are important for personal development (Figure 12); the highest proportion for any perceived benefit in the survey. A further 26% agree that it is important.

In every country, more than half of respondents totally agree that adult learning and CVET are important for personal development, notably in Malta (86%), Greece (82%) and Portugal (80%). Fewer totally agree in Croatia (57%) and Iceland (58%), but even in these two countries 94% of respondents at least agree that adult learning and CVET are important for personal development.

⁽¹⁰⁾ Eurostat data unemployment rates up to August 2019. https://ec.europa.eu/eurostat/statistics-explained/index.php/Unemployment_statistics

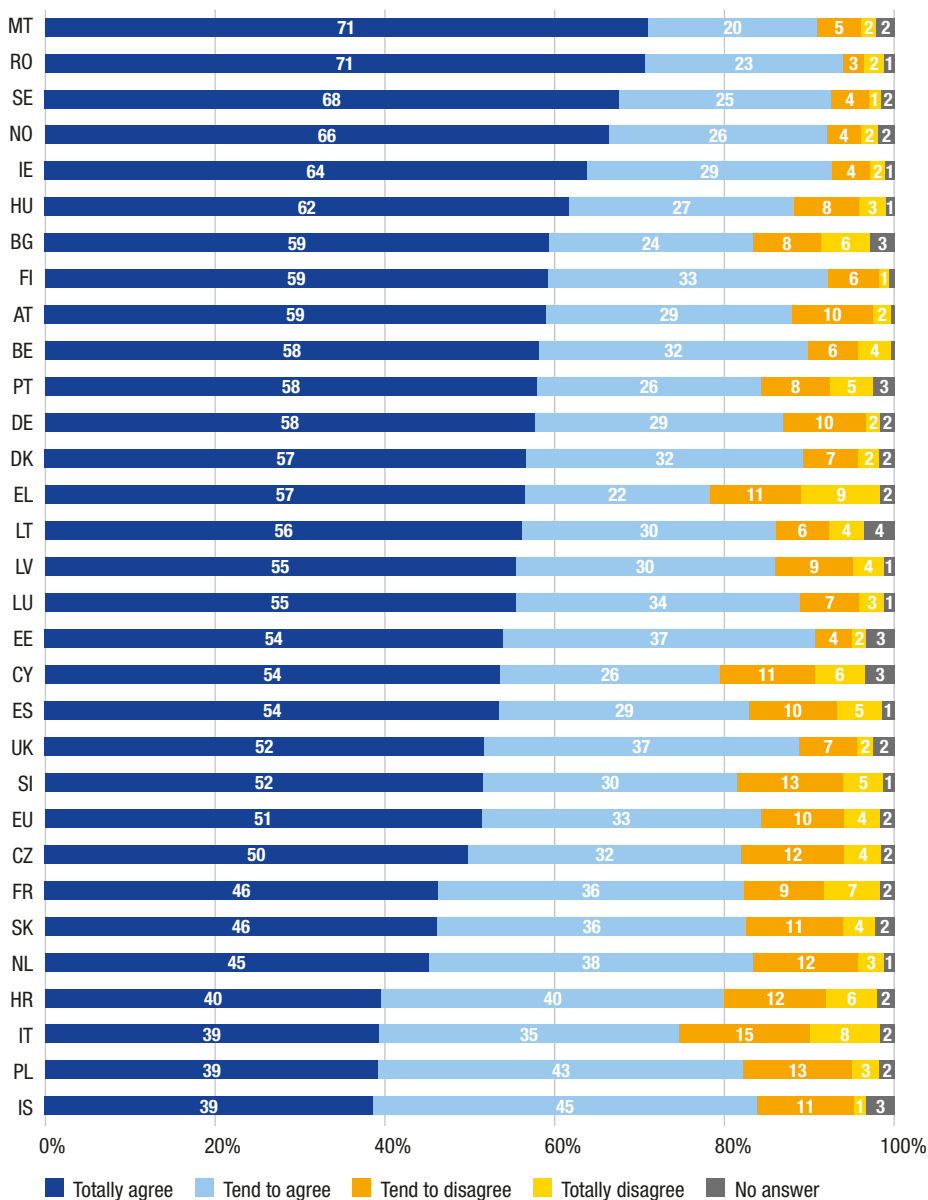
Figure 9. **Benefits: looking for a new job, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

Figure 10. **Benefits: reducing unemployment, country (EU-28, Iceland and Norway)**

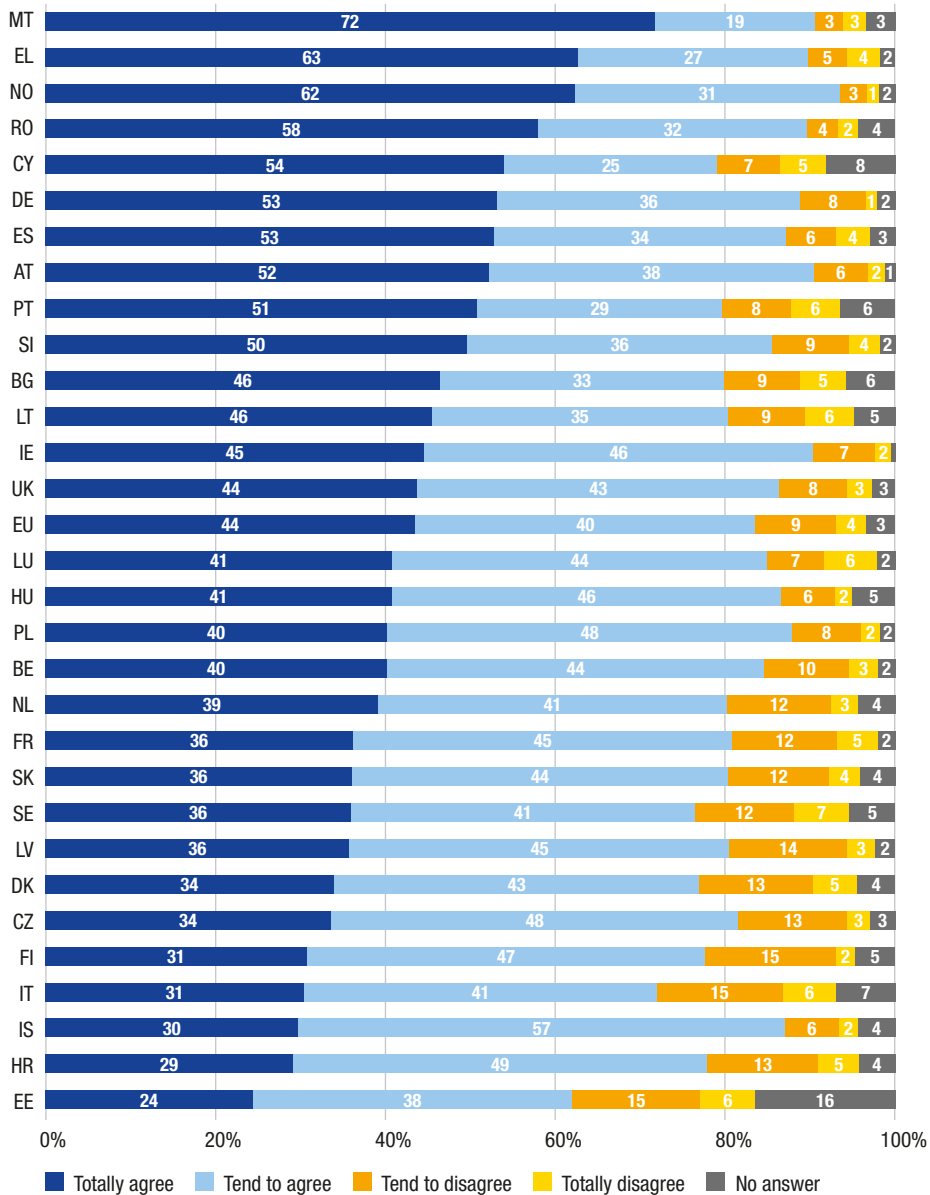
Q1408 - AL and CVET are important to reduce unemployment (%)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 11. **Benefits: work-related organised training for developing skills that can be used in any job, country (EU-28, Iceland and Norway)**

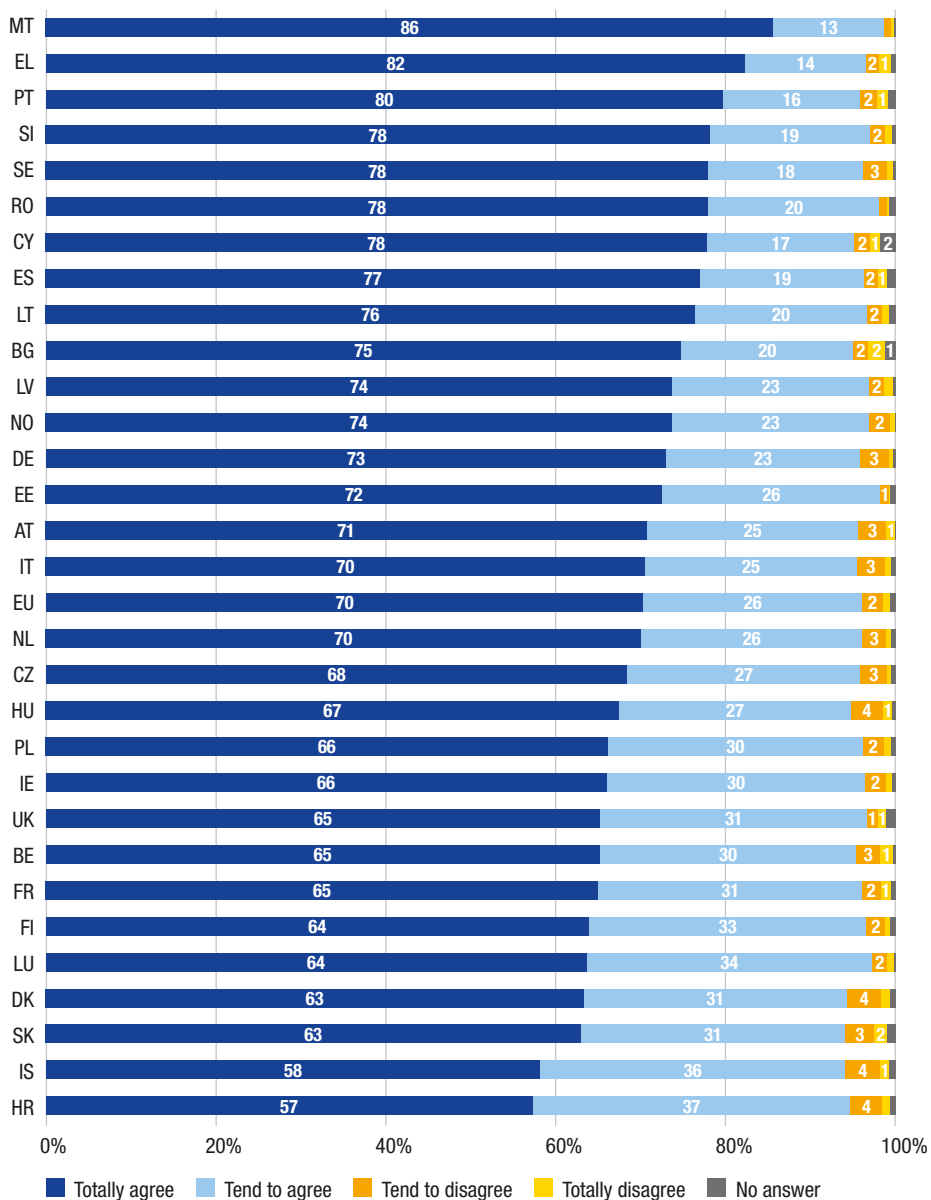
Q2004 - Work-related training is important to develop skills that can be used in any job (%)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 12. **Benefits: personal development, country (EU-28, Iceland and Norway)**

Q1406 - AL and CVET are important for personal development (%)



Source: Cedefop opinion survey on adult learning and CVET.

3.2.2. Further educational attainment

Overall, respondents in Member States are less convinced that adult learning and CVET are as important as school or university education (Figure 13); only 46% of respondents totally agree.

Equivalence between the two types of learning is highest in Malta, where 73% of respondents totally agree, and in Romania (61%). Most respondents disagree that adult learning and CVET are as important as school or university education in Estonia (29%), Croatia (23%) and Slovenia (22%).

Some 32% of respondents totally agree that adult learning and CVET are a way to obtain the equivalent of a traditional college or university degree. A further 41% agree (Figure 14).

Malta (61%) is the one country where more than half of respondents totally agree, with relatively high proportions in Romania (50%), Ireland (45%), Cyprus (44%) and Greece (42%). Respondents in Estonia are most likely to disagree (48%), followed by those in Italy (42%). Low results in some countries may indicate a preference for formal degrees due to cultural practices and societal norms.

Less than half of respondents (44%) totally agree that adult learning and CVET are important primarily for adults who do not already have a degree (Figure 15).

In 11 countries, more than half of respondents totally agree, notably Greece (68%), Malta and Romania (both 65%) and Cyprus (64%). Some 22% of all respondents disagree, mostly in the Netherlands (54%), Germany (40%), Czechia (39%) and Iceland (38%).

Some 73% of all respondents agree (32% totally agree, 41% agree) that organised work-related training activities can be used to obtain qualifications recognised by the state; 21% disagree (Figure 16).

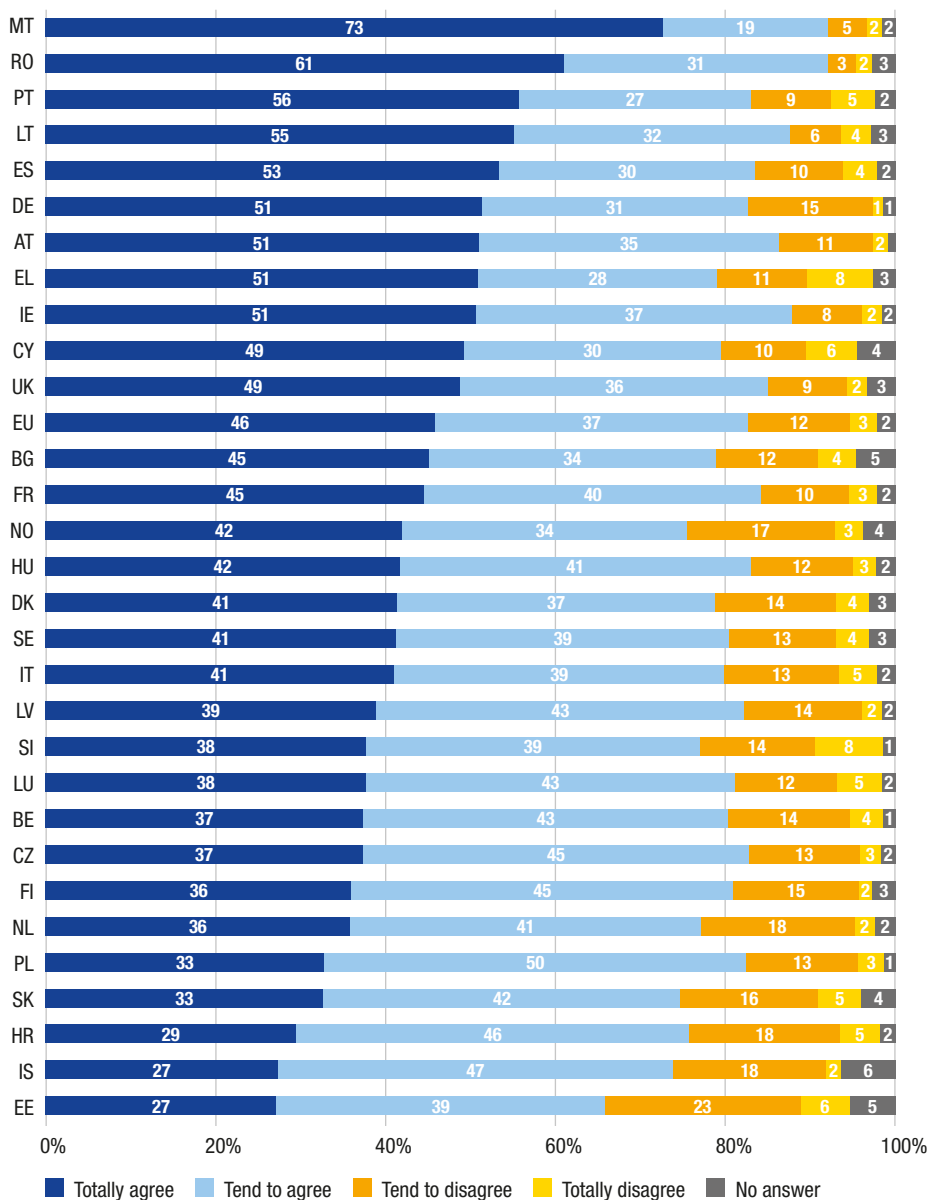
Respondents in Malta are most likely to totally agree (64%), followed by Romania (52%), Greece (46%) and Cyprus (44%). Disagreement is highest in Spain (30%), the Netherlands (29%) and Italy (27%).

Some 78% of respondents agree that there are many ways of obtaining a state-recognised degree as an adult; 15% disagree (Figure 17).

At least half of respondents totally agree in Malta (64%), Germany and Ireland (51%). Respondents are most likely to disagree in Croatia and Slovakia (both 24%) and Greece (23%).

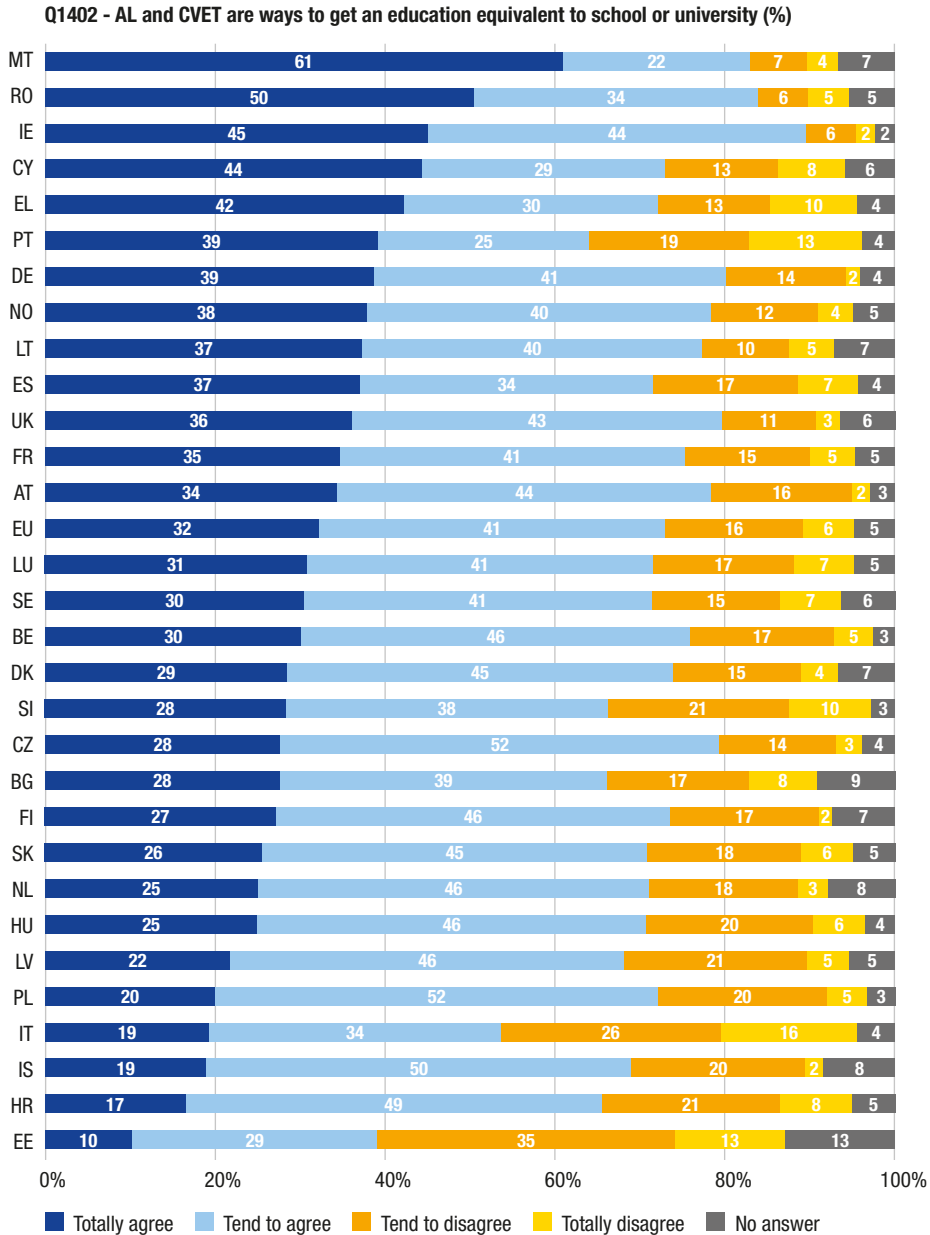
Figure 13. **Benefits: importance compared to school or university education, country (EU-28, Iceland and Norway)**

Q1401 - AL and CVET are as important as school or university (%)



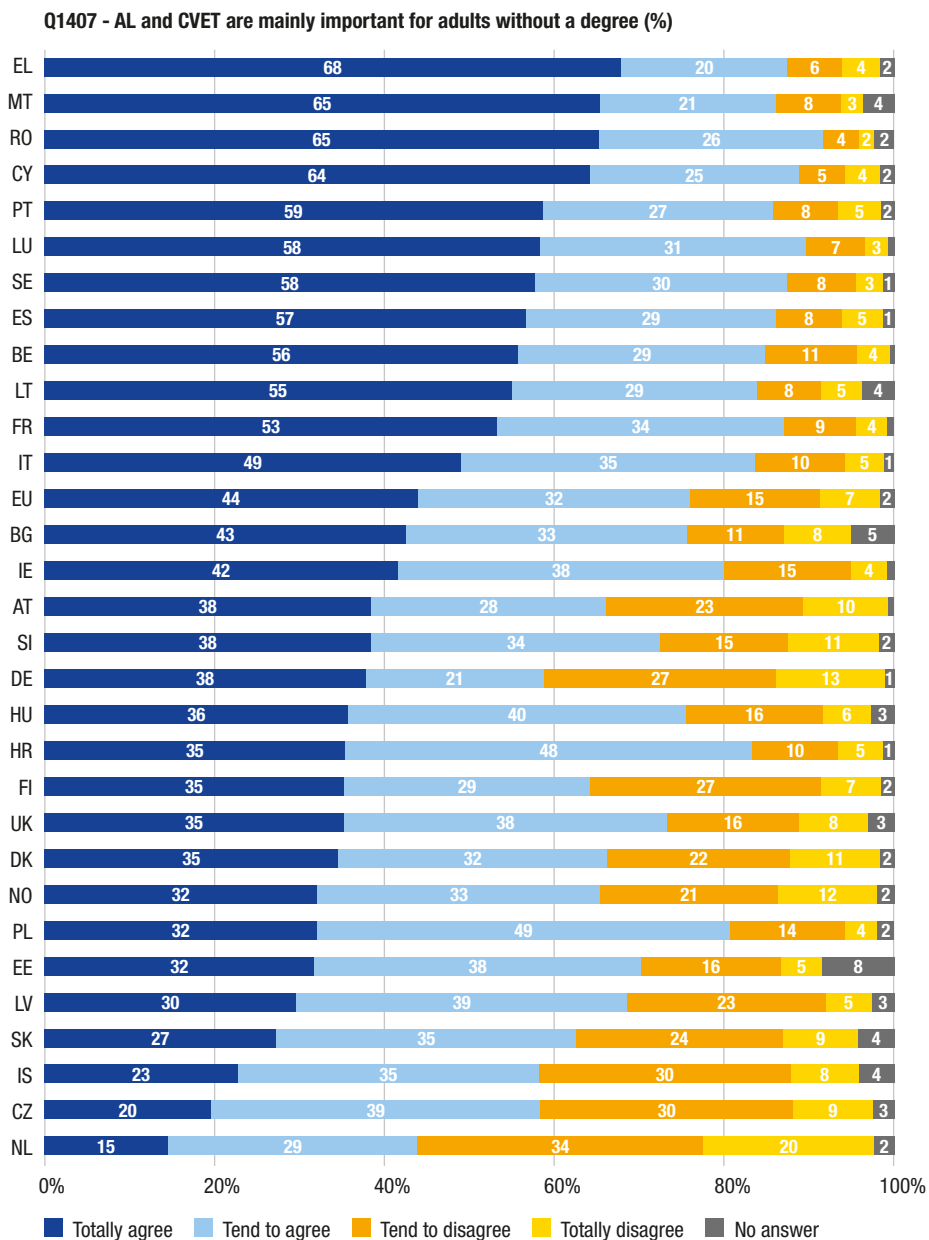
Source: Cedefop opinion survey on adult learning and CVET.

Figure 14. **Benefits: a way to obtain the equivalent of a traditional degree, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

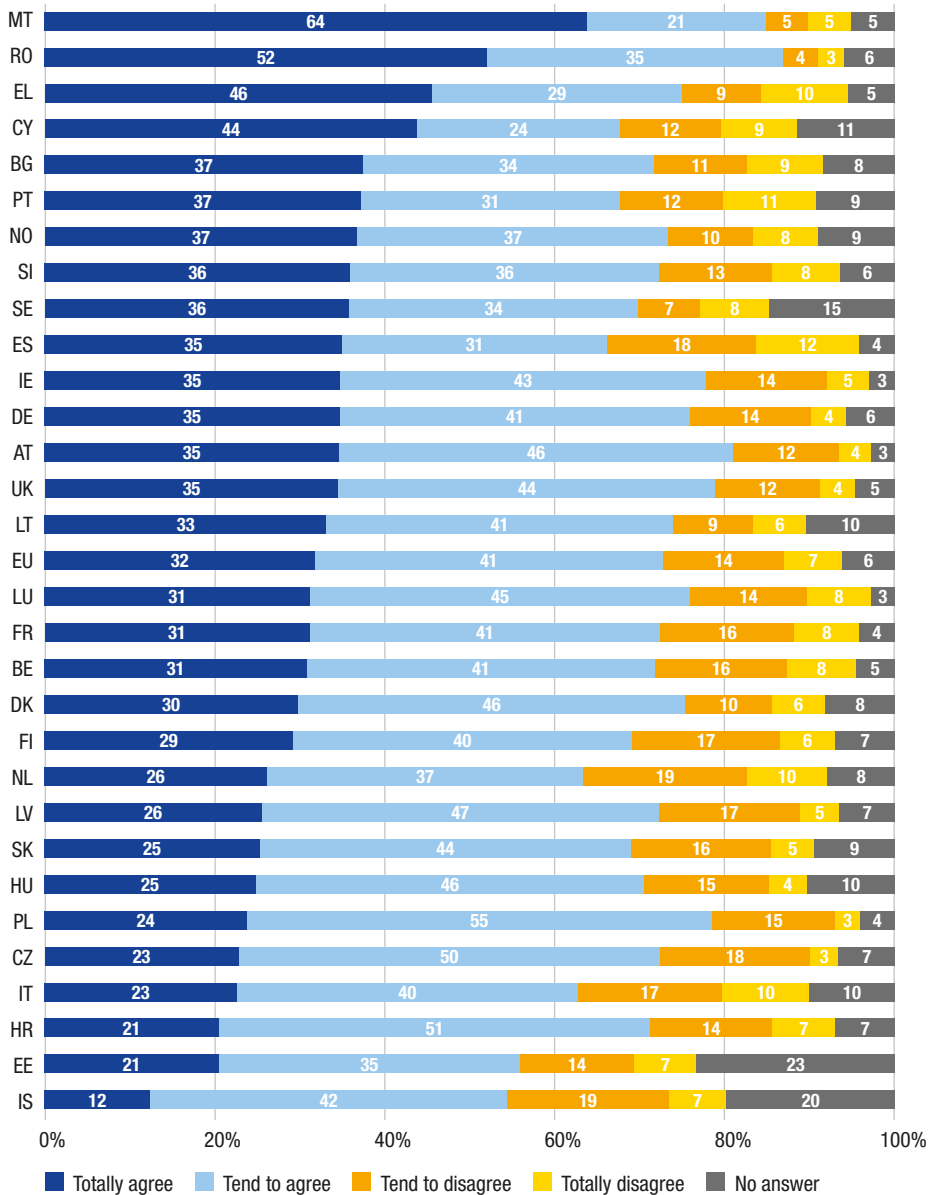
Figure 15. **Benefits: importance for adults without a degree, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

Figure 16. **Benefits: organised training and obtaining state recognised qualifications, country (EU-28, Iceland and Norway)**

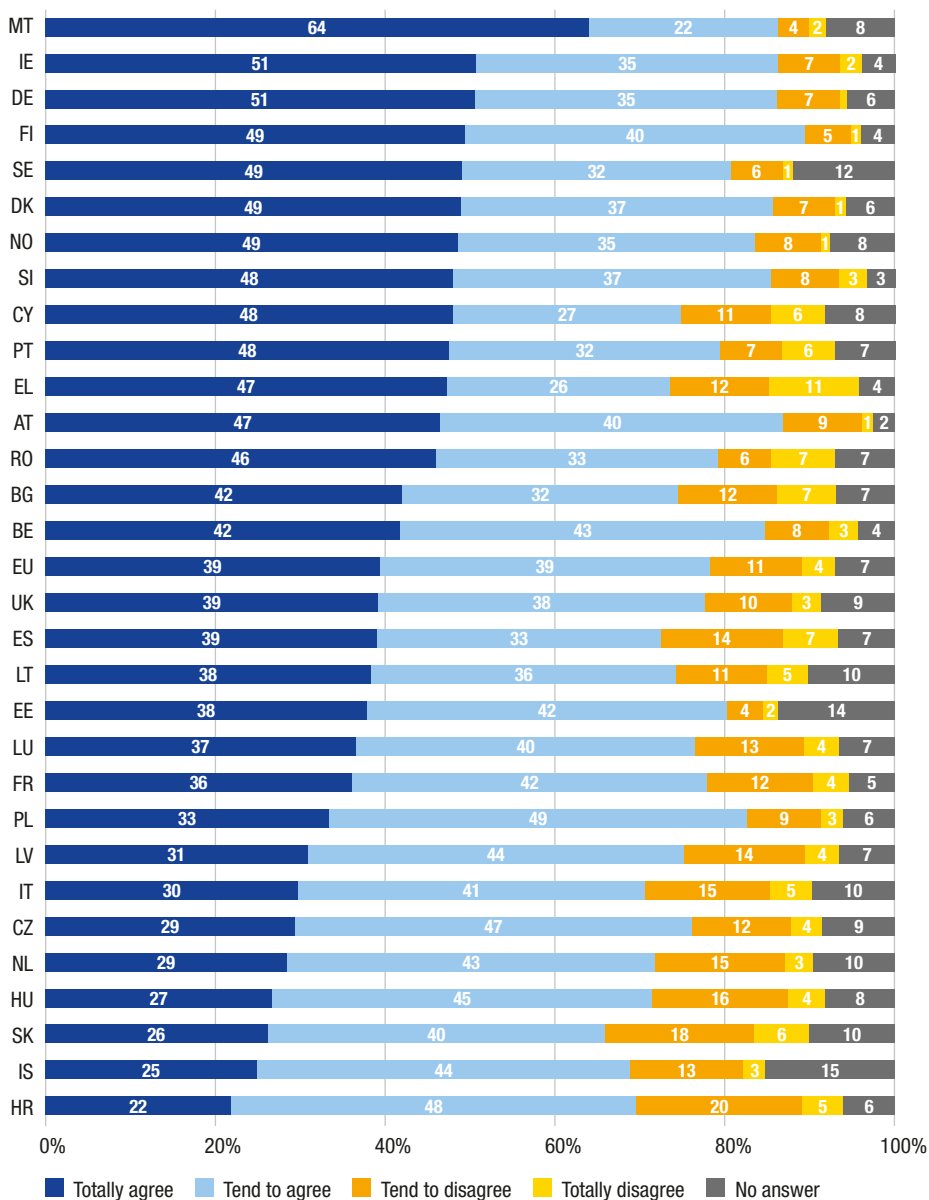
Q2003 - Work-related training allows to get a qualification recognised by the state also after youth (%)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 17. **Benefits: non-work-related training and obtaining a state recognised degree, country (EU-28, Iceland and Norway)**

Q0906 - There are many ways to get a degree recognised by the state also after youth (%)



Source: Cedefop opinion survey on adult learning and CVET.

3.3. Quality

Most respondents (69%) think that the quality of adult learning and CVET in their country is 'good' (11% very good and 58% fairly good) (Figure 18). Some 24% of respondents think that the quality is bad (5% very bad, 19% fairly bad).

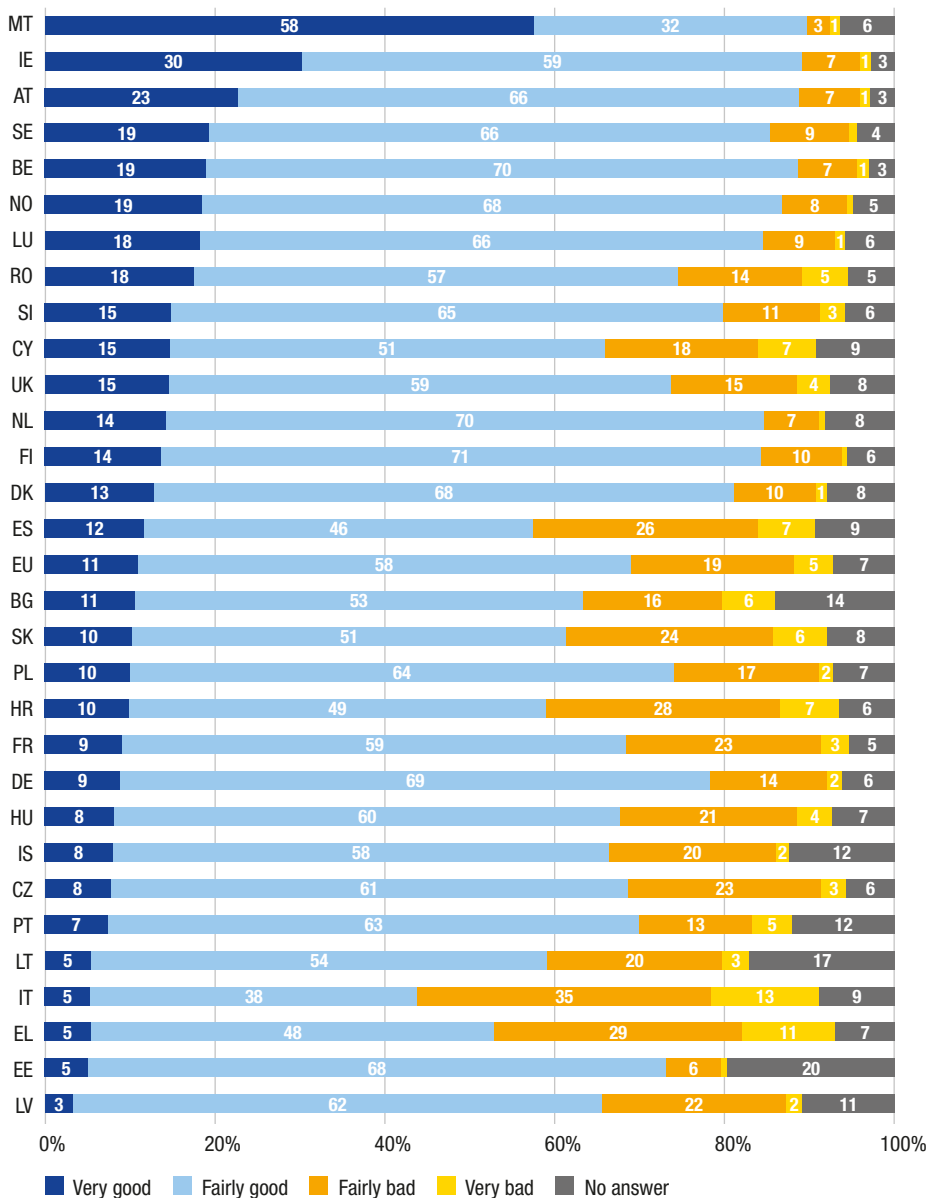
In all countries, respondents are more likely to describe adult learning and CVET as good rather than bad, except in Italy where 43% say it is good and 48% bad. Very good ratings are highest in Malta (58%), Ireland (30%) and Austria (23%). As well as in Italy (48%), more than a third of respondents rate the quality of adult learning and CVET in their country as bad in Greece (40%) and Croatia (35%).

Among respondents who took part in organised training activities in the last year, most say the training was good (93%), including 39% 'very good' and 54% 'fairly good' (Figure 19).

In all Member states, most respondents say that their recent organised training was 'very' or 'fairly' good. The proportion of 'very good' ratings is highest in Malta (60%), followed by Ireland (52%) and the UK (51%), Sweden (49%), Czechia (47%) and Slovenia (46%). In every country, fewer than 10% of respondents say their training was poor.

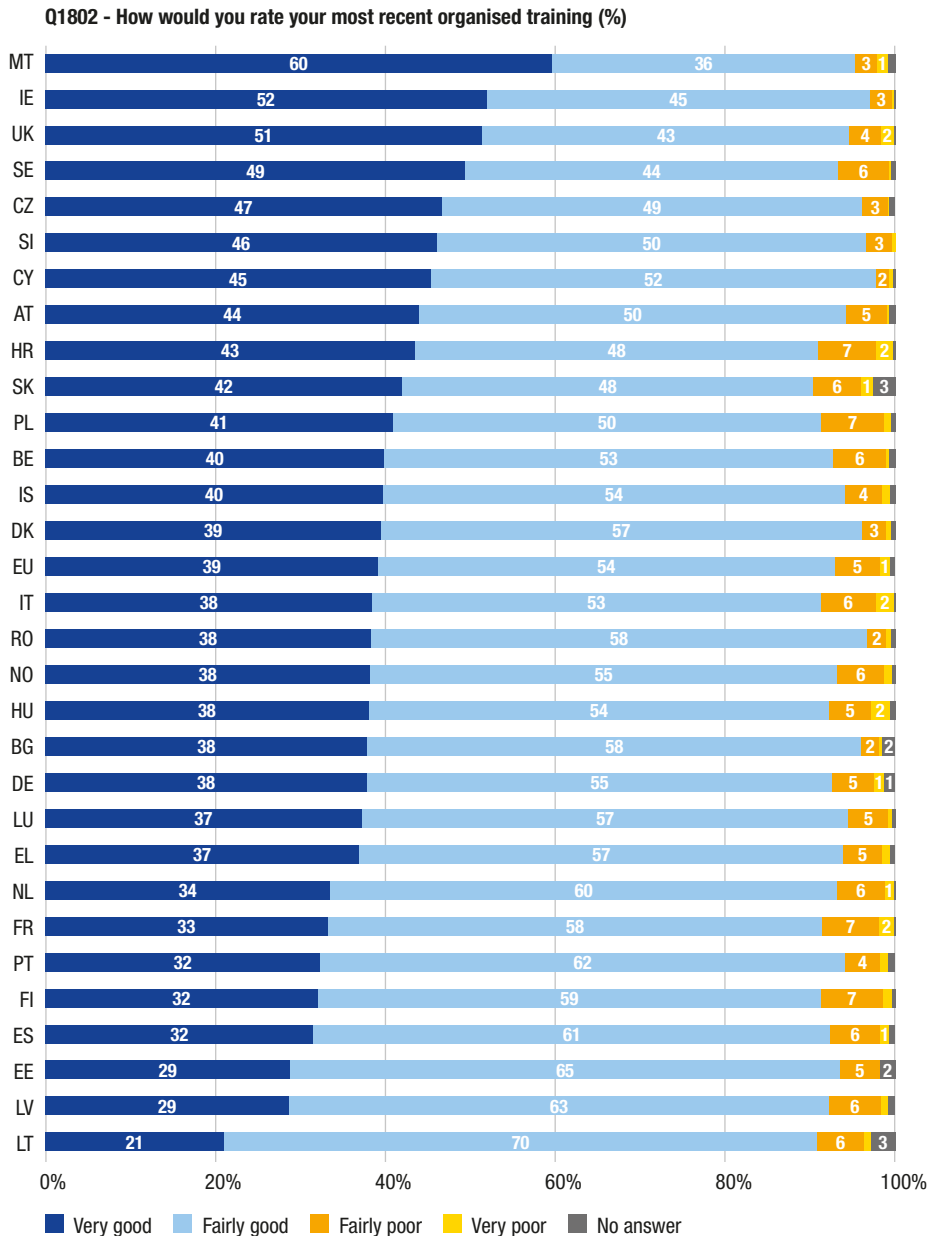
Figure 18. **Benefits: quality of learning, country (EU-28, Iceland and Norway)**

Q1300 - How do you think the quality of AL and CVET is generally regarded in your country (%)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 19. **Benefits: rating of organised training by participants, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

CHAPTER 4.

Perceptions: access

The survey shows that information provision in Member States about adult learning and continuing vocational education and training (CVET) opportunities is good overall; most respondents in all countries seem aware of them. The positive image of adult learning and CVET extends to perceptions of availability and access.

This chapter examines public awareness of and access to adult learning and CVET. It also discusses barriers to participation and perceptions of measures to overcome them.

Reflecting views on their importance, most respondents in all Member States had looked for information about adult learning and CVET opportunities in the 12 months prior to the survey. Generally, Member States have made information easy to find through many different sources, which people use to various degrees and combine in different ways in different countries, with the internet being the most popular source of information. However, people feel less well-informed about the availability of opportunities for work-related adult learning and CVET.

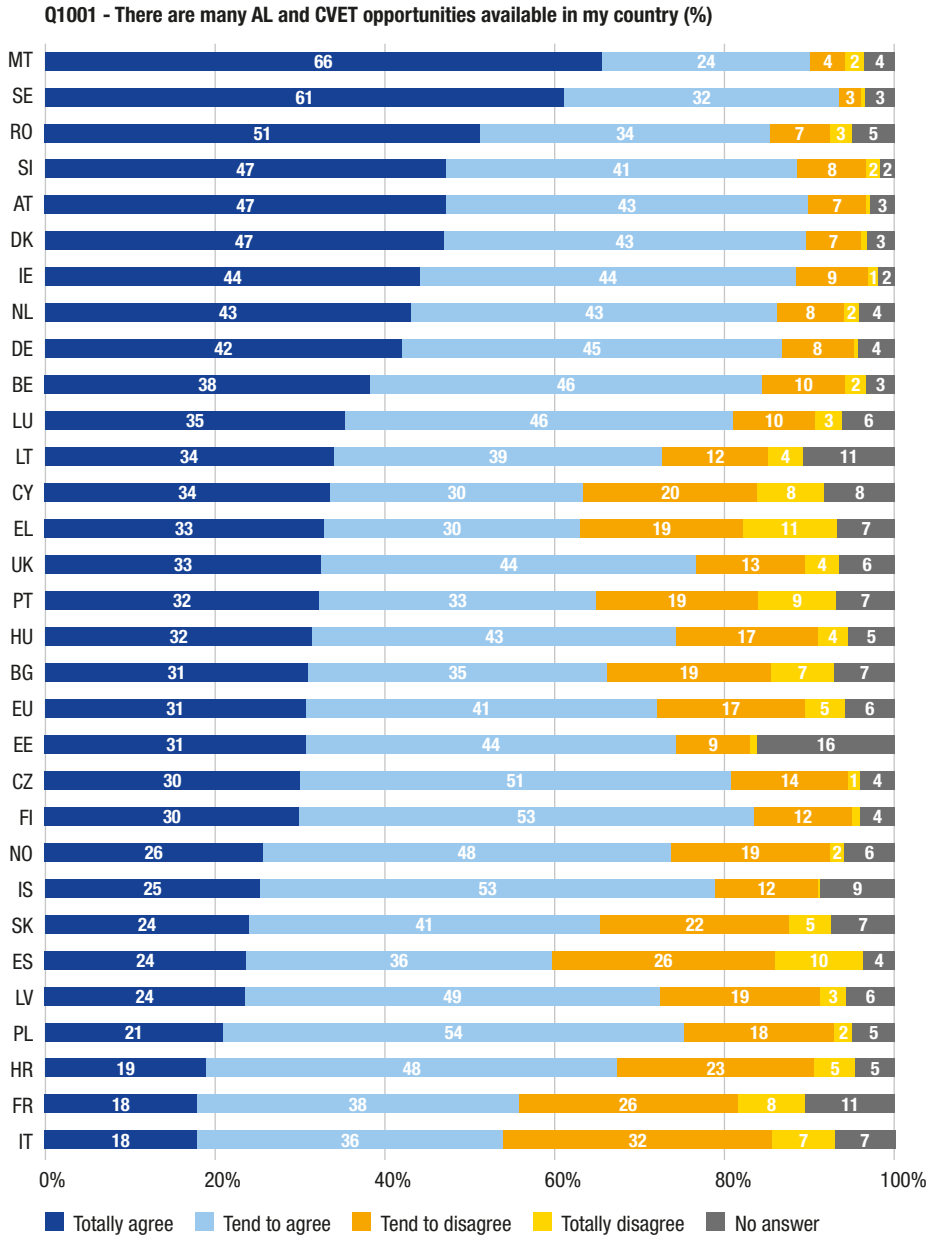
Member States provide various types of support for people to encourage participation in adult learning and CVET. However, in almost all countries family and friends remain the principal source of support. There is also strong support for measures to overcome barriers to participating in adult learning and CVET in Member States. However, the main reason that people in all Member States do not participate in adult learning and CVET is that they see no need to do so.

4.1. Opportunities, information and guidance

Some 72% of all respondents agree that there are many adult learning and CVET opportunities in their country (31% totally agree; 41% agree) (Figure 20).

Most respondents totally agree in Malta (66%) and Sweden (61%), followed by Romania (51%) and Denmark, Austria and Slovenia (all 47%).

Figure 20. **Access: available opportunities, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

Respondents in Italy are most likely to disagree (39%), followed by Spain (36%), France (34%) and Greece (31%).

Most respondents (55%) had looked for information on adult learning and CVET opportunities in the last 12 months (Figure 21). Specifically, 19% had often looked, 21% sometimes and 15% rarely.

In the 12 months preceding the survey most respondents had looked for information on learning and training 'often'. Respondents in Czechia (24%) and Spain and Romania (both 23%) are most likely to have 'often' looked for information on adult learning and CVET opportunities in the last 12 months. The proportion of respondents who have looked for information 'often' or 'sometimes' is highest in Spain (52%) and Ireland (50%) and lowest in France (24%), Denmark (28%) and Norway (29%).

Respondents in France (65%) are the most likely not to have looked for information in the last 12 months, followed by Denmark (57%), Lithuania (56%) and Bulgaria (55%).

Countries where respondents are least likely to have often looked for information are also those with the highest levels of actual participation (including Denmark, Finland, Norway and Sweden) ⁽¹¹⁾. This may suggest either that personal efforts to search for information on adult learning and CVET do not necessarily influence rates of participation, or that these countries have active information policies that give information to people rather than just making it available for people to go and find.

Most respondents (66%) agree that it is easy to find information on adult learning and CVET opportunities (Figure 22); some 27% disagree. Respondents in Malta (60%) and Romania (47%) are the most likely to totally agree that it is easy to find information. Those in France (44%) and Spain (41%) are most likely to disagree.

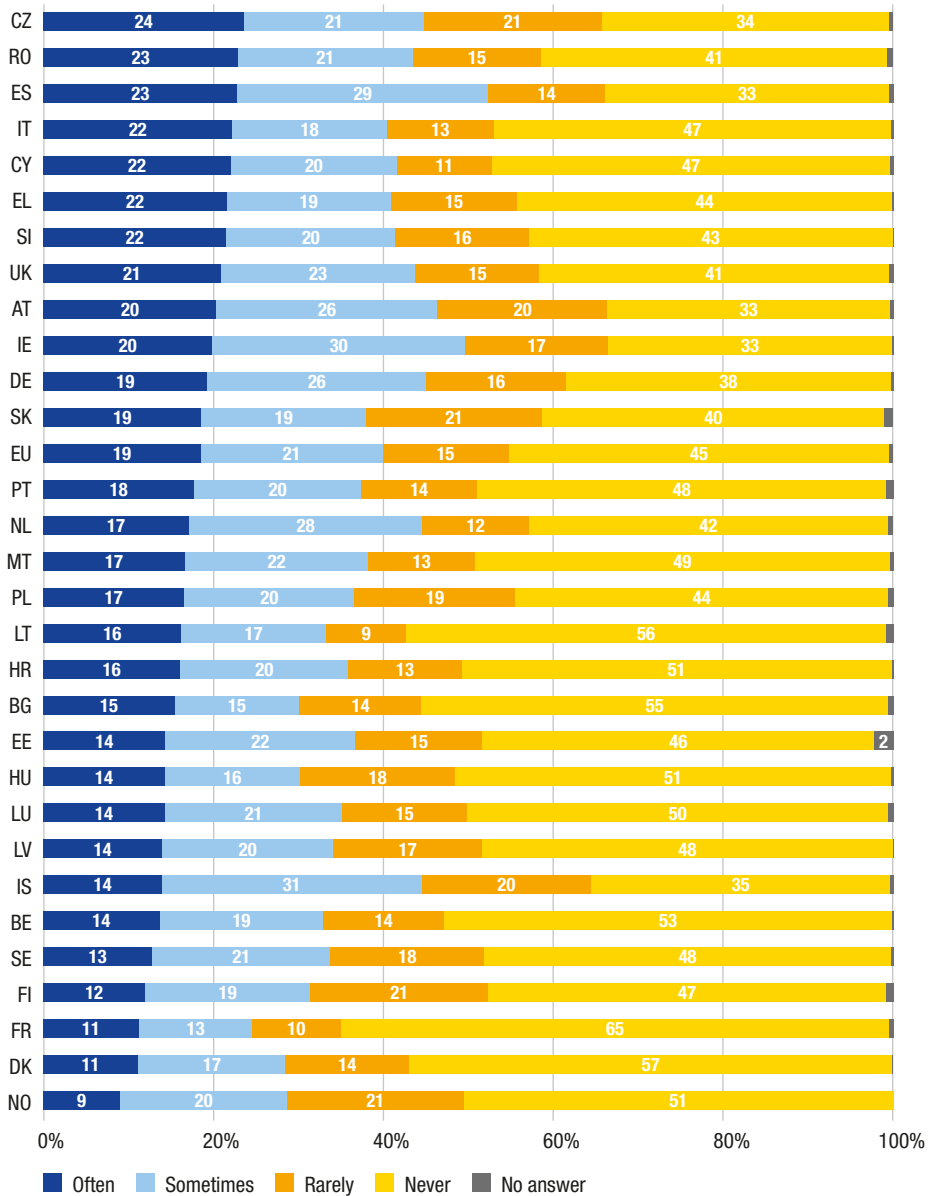
Some 61% of respondents agree that suitable work-related training activities are easily available; 31% disagree (Figure 23). Respondents in Malta (55%) are most likely to totally agree, followed by Romania (45%), Sweden (36%) and Cyprus (32%). Disagreement is highest in Italy (45%) and Greece (42%).

Respondents' perceptions are mixed over how well-informed they feel about work-related training and how accessible training opportunities are (Figure 24). Some 60% of respondents in the EU totally agree or agree that they are well-informed about organised work-related training activities; 34% disagree.

⁽¹¹⁾ Based on Eurostat data on participation in adult learning from 17 May 2019.
<https://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20190517-1>

Figure 21. **Access: looked for information in the past 12 months, country (EU-28, Iceland and Norway)**

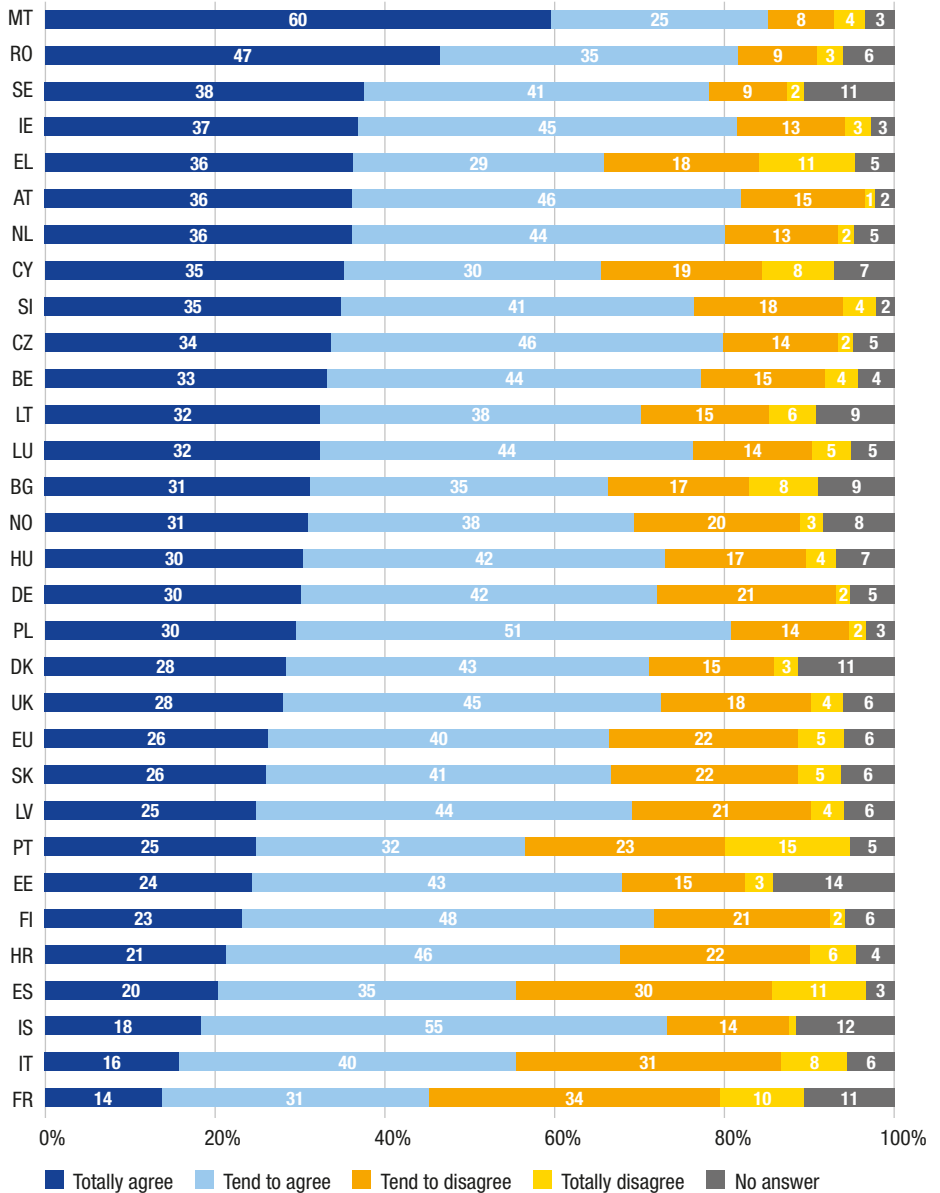
Q1600 - How often have you looked for information on learning and training opportunities in the last 12 months? (%)



Source: Cedefop opinion survey on adult learning and CVET.

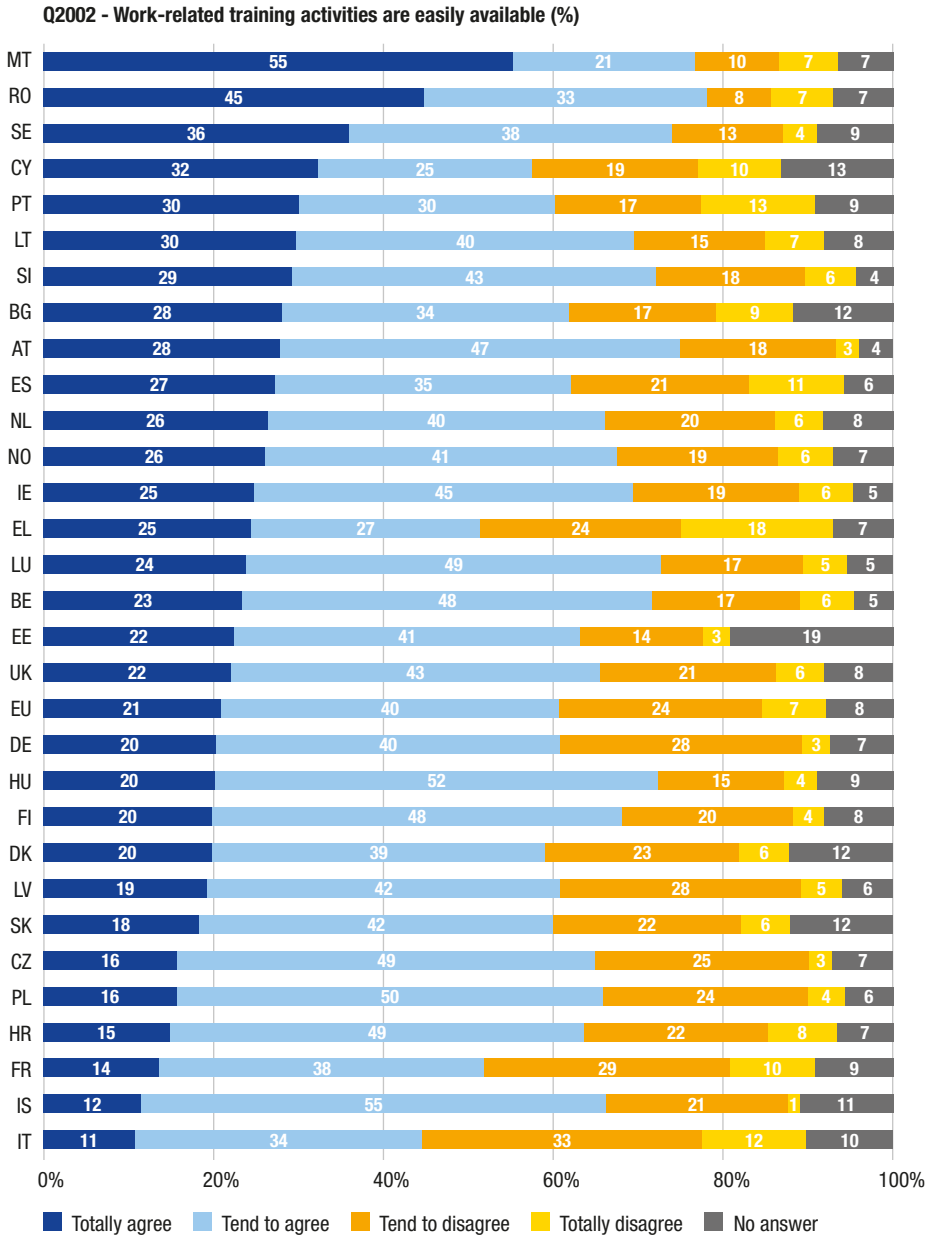
Figure 22. **Access: ease of finding information, country (EU-28, Iceland and Norway)**

Q1002 - It is easy to find information on AL and CVET opportunities (%)



Source: Cedefop opinion survey on adult learning and CVET.

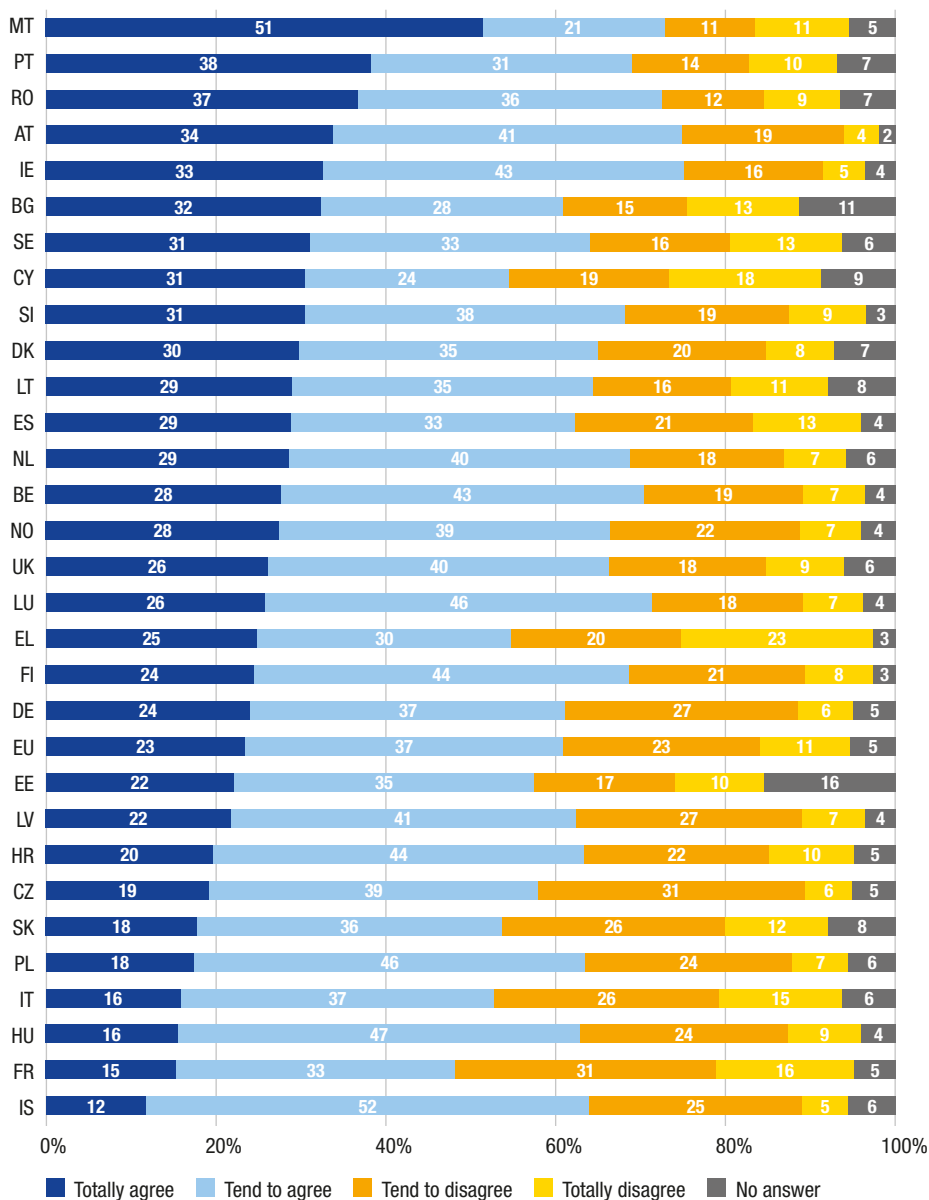
Figure 23. **Access: availability of work-organised activities, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

Figure 24. **Access: well-informed about organised work-related activities, anything, country (EU-28, Iceland and Norway)**

Q2001 - I feel well informed about work-related training (%)



Source: Cedefop opinion survey on adult learning and CVET.

In Malta, 51% of respondents totally agree that they are well-informed followed by Portugal (38%), Romania (37%), Austria (34%) and Ireland (33%). Levels of disagreement are highest in France (47%), Greece (43%) and Italy (41%).

When given the option of multiple answers, 63% of respondents in the EU-28 Member States said that the internet is the best source of advice about adult learning and CVET, followed by local colleges or universities (47%) and professional or sector associations (43%) (Table 3).

The internet is seen as giving the best advice about adult learning and CVET in all countries except Romania, where professional or sector associations come first with 48%. Respondents in Poland (82%), Czechia (81%), the UK (80%) and Iceland (78%) are most likely to say that they would get the best advice about adult learning and CVET from the internet. Only in Romania (31%), Italy (39%), Portugal (43%), Croatia (48%) and Bulgaria (49%) do less than half of respondents say the internet would give them the best advice.

These multiple answers indicate that people combine sources, using the internet as the first contact point and to filter information. How information sources are combined varies considerably between countries.

Respondents in the UK (71%), Ireland (70%), Belgium and Iceland (both 64%) and Czechia and Germany (both 63%) are most likely to combine the internet with advice on adult learning and CVET obtained from a local college or university. In contrast, Estonia (13%), Lithuania (16%), Hungary (18%), Slovakia (19%) and Italy and Latvia (both 20%) are least likely to consult local colleges or universities.

In Germany (63%), Luxembourg (61%), Belgium (58%), France (55%) and Ireland (52%) more than half of respondents say that professional or sector associations give the best advice about adult learning and CVET. In contrast, only a few agree in Lithuania (7%), Estonia (12%), Croatia (13%), Hungary (14%) and Slovakia (15%).

4.2. Support

Some 52% of respondents see family as the best form of financial or practical support if they want to take part in training, followed by an employer (39%), government (31%), professional or sector associations (29%), friends or colleagues (27%), employment agencies (23%) and trade unions (15%) (Table 4).

Table 3. Access: guidance about learning, country (EU-28, Iceland and Norway)

Q1101 Q1112	On the internet (08)	Local college or university (09)	Professional or sector associations (07)	Friends or colleagues (03)
EU-28	63	47	43	41
BE	76	64	58	56
BG	49	29	22	42
CZ	81	63	49	64
DK	61	49	41	39
DE	72	63	63	50
EE	71	13	12	27
IE	75	70	52	60
EL	58	37	18	34
ES	60	51	44	42
FR	56	40	55	37
HR	48	30	13	30
IT	39	20	23	13
CY	54	30	20	20
LV	68	20	17	39
LT	60	16	7	25
LU	72	54	61	44
HU	64	18	14	27
MT	52	30	18	21
NL	75	60	43	44
AT	64	53	43	39
PL	82	41	24	49
PT	43	41	38	39
RO	31	34	48	33
SI	67	41	23	41
SK	58	19	15	35
FI	72	39	23	34
SE	69	52	37	45
UK	80	71	49	55
IS	78	64	47	58
NO	65	43	21	32

Source: Cedefop opinion survey on adult learning and CVET.

An employment agency (excluding temporary job agencies) (04)	Your employer (01)	Your family (02)	The government (other public administration services than employment agency) (05)	Trade Unions (06)
30	30	27	27	20
55	40	36	50	32
25	18	25	8	6
45	42	43	28	18
35	32	26	9	51
36	43	31	36	35
33	13	13	3	3
38	39	42	46	16
15	12	25	17	12
31	26	32	29	31
43	36	22	35	18
26	10	13	4	3
12	7	6	5	11
13	10	14	19	6
43	18	19	8	7
16	12	11	7	4
50	43	29	61	35
11	18	15	24	3
18	16	23	25	8
32	47	27	34	20
32	31	27	30	29
19	21	26	25	10
30	38	33	22	17
41	30	42	17	11
25	21	27	8	7
26	17	21	7	6
38	20	16	17	21
24	27	23	21	24
29	43	38	38	20
32	36	42	20	47
10	25	18	27	26

**Table 4. Access: support for participation, country
(EU-28, Iceland and Norway)**

Q1201-Q1219	Your family (02)	Your employer (01)	The government (other public administration services than employment agency) (05)
EU-28	52	39	31
BE	61	46	48
BG	67	24	8
CZ	70	68	34
DK	47	45	16
DE	62	53	44
EE	35	33	7
IE	64	48	47
EL	63	16	16
ES	60	31	30
FR	41	39	40
HR	68	19	6
IT	33	12	12
CY	53	12	20
LV	59	32	14
LT	37	22	6
LU	56	52	60
HU	56	30	21
MT	45	23	41
NL	54	60	39
AT	55	44	39
PL	53	34	24
PT	49	40	22
RO	59	29	18
SI	69	36	7
SK	51	30	6
FI	47	27	21
SE	43	37	42
UK	52	53	40
IS	65	49	14
NO	32	46	36

Source: Cedefop opinion survey on adult learning and CVET.

Professional or sector associations (07)	Friends or colleagues (03)	An employment agency (excluding temporary job agencies) (04)	Trade Unions (06)
29	27	23	15
42	40	41	26
13	26	15	5
42	41	42	22
31	33	26	43
38	36	33	24
5	10	28	2
34	42	26	12
9	20	9	7
28	26	20	21
42	24	37	13
6	17	11	2
22	8	7	6
7	7	5	3
11	19	24	6
5	18	13	3
45	39	45	28
8	17	7	3
13	12	12	6
21	27	17	12
28	30	30	27
19	36	16	9
23	24	19	10
31	22	23	7
12	24	15	5
9	20	21	5
14	27	31	17
21	18	13	16
37	35	21	17
36	37	15	64
11	11	3	20

In most countries, respondents see family as the best support option. Exceptions are the Netherlands, Norway and the UK where an employer is regarded as most likely to offer support; France, where it is professional or sector associations and Luxembourg, where government is the most frequent response.

Respondents regard family as the best support option notably in Czechia (70%), Slovenia (69%), Croatia (68%) and Bulgaria (67%). The proportion is lowest in Norway (32%), Italy (33%), Estonia (35%) and Lithuania (37%).

In five countries, more than half of respondents say that their employer would offer the most support if they wanted to take part in training: Czechia (68%), the Netherlands (60%), Germany and the UK (both 53%) and Luxembourg (52%). Respondents are least likely to say they would be supported by an employer in Cyprus and Italy (both 12%), Greece (16%) and Croatia (19%).

Countries vary in their perceptions of government's role in providing support for training. Respondents are most likely to say that the government would offer support in Luxembourg (60%), Belgium (48%), Ireland (47%) and Germany (44%). However, fewer than one in 10 respondents say this in Croatia, Lithuania and Slovakia (all 6%), Slovenia and Estonia (both 7%) and Bulgaria (8%).

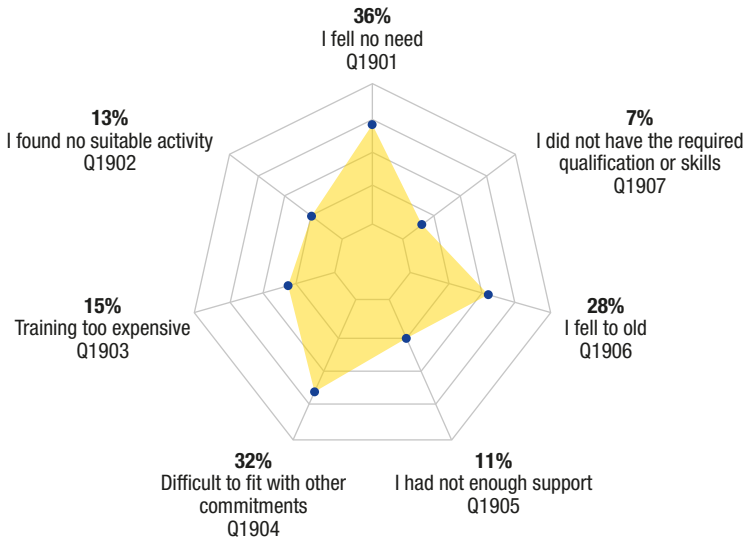
4.3. Measures to encourage participation

Section 2.2 discussed why adults learn. This section, in the context of access, considers why adults do not participate in adult learning and CVET and what measures may encourage them to do so.

Respondents who had not taken part in any organised training in the past year were asked why. The three most common reasons respondents give are that they do not need any training (36%), it is difficult to fit in with other commitments (32%) and that they feel too old (28%) (Figure 25). Less frequent responses are that training is too expensive (15%), a lack of suitable opportunities (13%), insufficient support (11%) and lacking the right skills or qualifications (7%).

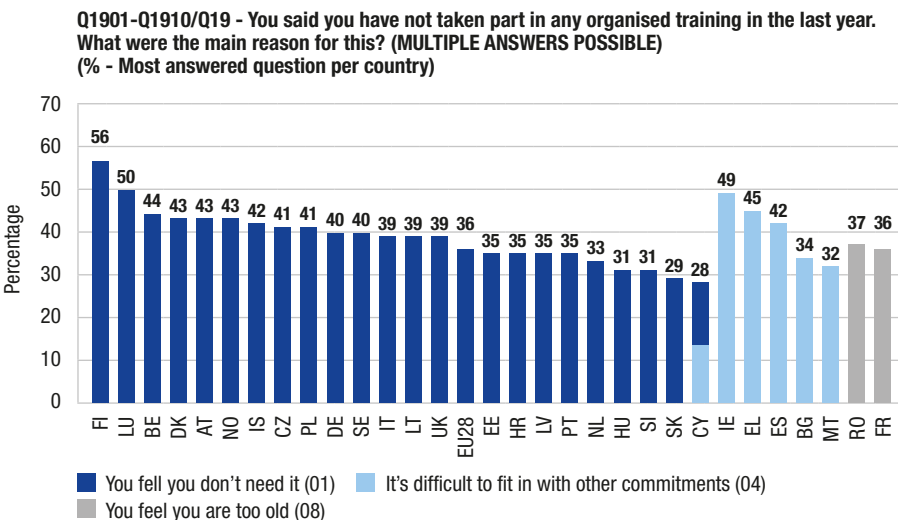
In 22 countries, the most frequent reason respondents give for not taking part in organised training is that they feel they do not need it (Figure 26). Respondents are most likely to give this reason in Finland (56%) and Luxembourg (50%). In five countries, the most common reason is difficulties

Figure 25. Access: reasons for non-participation, overall



Source: Cedefop opinion survey on adult learning and CVET.

Figure 26. Access: reasons for non-participation, country (EU-28, Iceland and Norway)



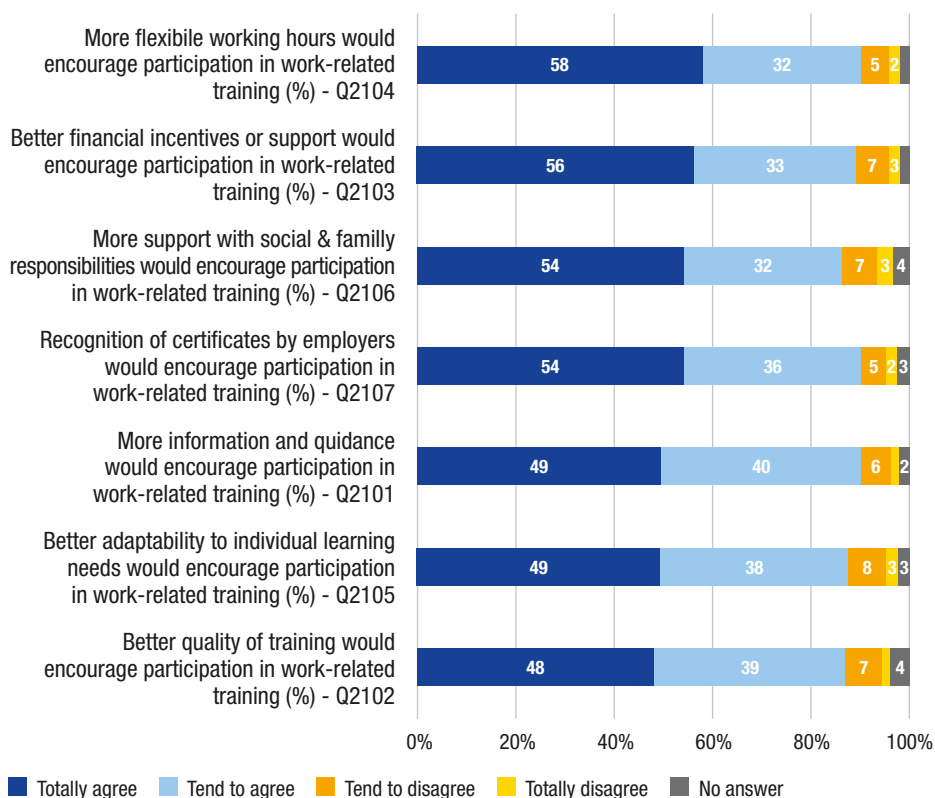
Source: Cedefop opinion survey on adult learning and CVET.

fitting in training with other commitments, with the highest proportions in Ireland (49%), Greece (45%) and Spain (42%). In Cyprus, the answers no need and difficult to fit in with other commitments are joint highest. In Romania (37%) and France (36%) feeling too old is the most common reason for not taking part in organised training.

Respondents were positive about measures to encourage more adults to participate in work-related learning and training (Figure 27). Some 58% totally agree that flexible working hours or time off work to learn would encourage people to participate; 56% that people would be encouraged by

Figure 27. **Access: measures to encourage participation in training, overall**

Q21 - To what extent do you agree or disagree with the following statements regarding work-related learning and training participation (EU-28)



Source: Cedefop opinion survey on adult learning and CVET.

financial incentives or support; 54% by certification of learning and training recognised by employers; and 54% through support with childcare and other caring responsibilities.

Just under half of respondents totally agree that the following would encourage more adults to participate in work-related learning and training: more information and guidance (49%); being able to adapt the learning to individual needs (49%); and better-quality training (48%).

Respondents in Greece and Malta (both 79%) are most likely to totally agree that more information and guidance would encourage more adults to participate in work-related learning and training (Figure 28), followed by those in Cyprus (73%), Romania (70%) and Spain and Portugal (both 69%). Respondents are most likely to disagree in Czechia (13%), Germany, the Netherlands, Austria and Slovenia (all 12%).

Respondents in Greece and Malta (both 78%) are most likely to totally agree that better quality training would encourage more adults to participate in work-related learning and training, followed by those in Cyprus and Portugal (both 71%), Romania (70%) and Spain (68%) (Figure 29). Respondents are most likely to disagree in Germany and the Netherlands (both 15%) and Denmark and Slovenia (both 14%).

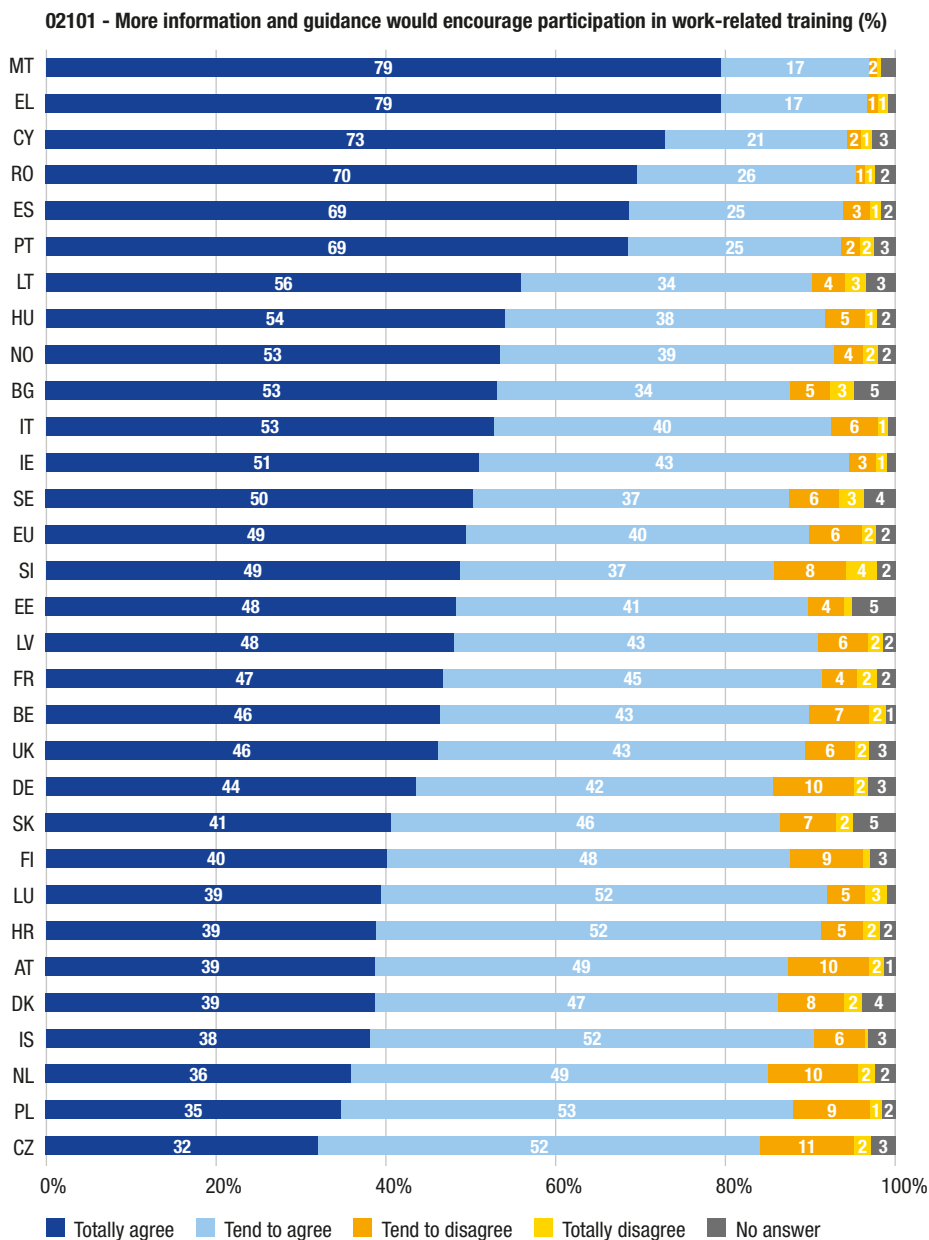
Overall, 56% of respondents totally agree that financial incentives or support would encourage greater participation in work-related learning and training (Figure 30). The highest level of total agreement is in Greece (81%), Malta (79%) and Cyprus (75%). In contrast, in six countries less than half of respondents totally agree: the Netherlands (43%), Luxembourg (45%), Denmark, France and Austria (all 47%) and Czechia (49%).

Some 58% of respondents totally agree that flexible working hours or time off work to learn would encourage more adults to participate in work-related learning and training (Figure 31).

The highest level of total agreement is in Malta (77%), Greece and Cyprus (both 72%), Spain (71%) and Portugal (70%). The highest levels of disagreement are in Austria (13%), France (12%) and Germany, the Netherlands and Slovenia (all 10%).

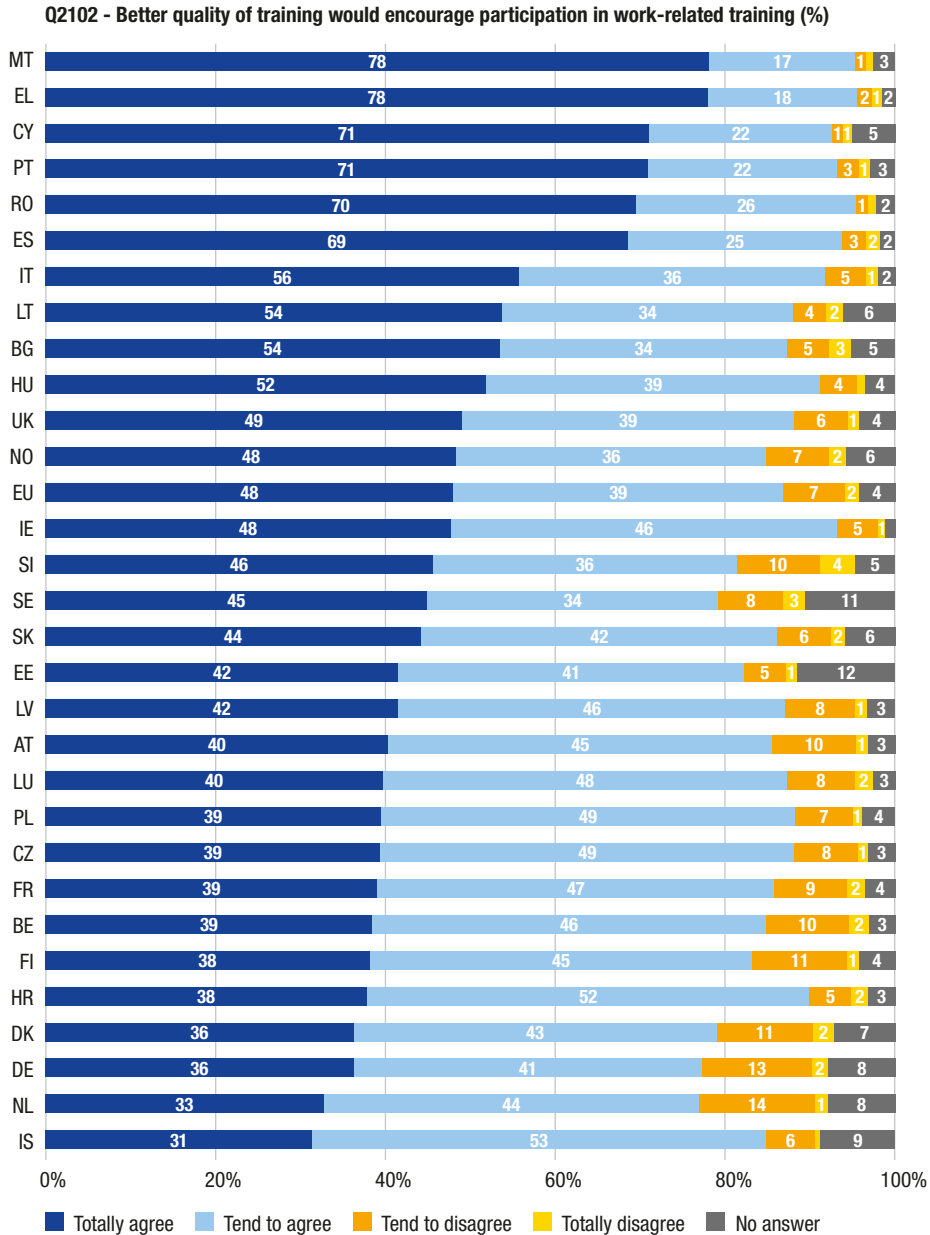
Some 49% of respondents totally agree that being able to adapt learning to individual needs would encourage more adults to participate in work-related learning and training (Figure 32). Respondents are most likely to totally agree in Malta (76%), Greece (70%), Spain and Cyprus (both 65%), Romania (64%), Sweden (63%) and Portugal (62%). The highest levels of disagreement are in Germany (16%), Belgium and France (both 13%) and Austria (12%).

Figure 28. **Access: need for more information and guidance, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

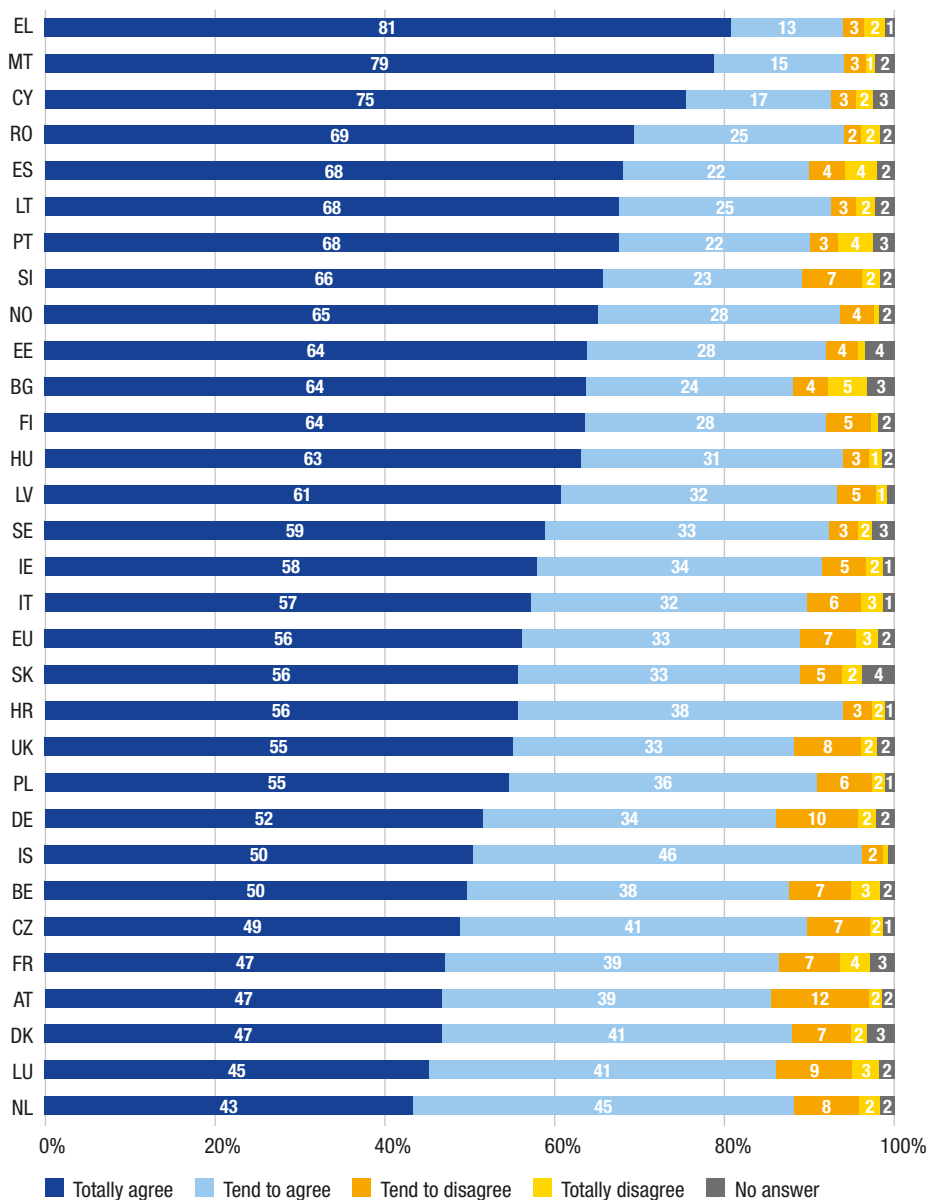
Figure 29. **Access: improve the quality of training, country (EU-28, Iceland and Norway)**



Source: Cedefop opinion survey on adult learning and CVET.

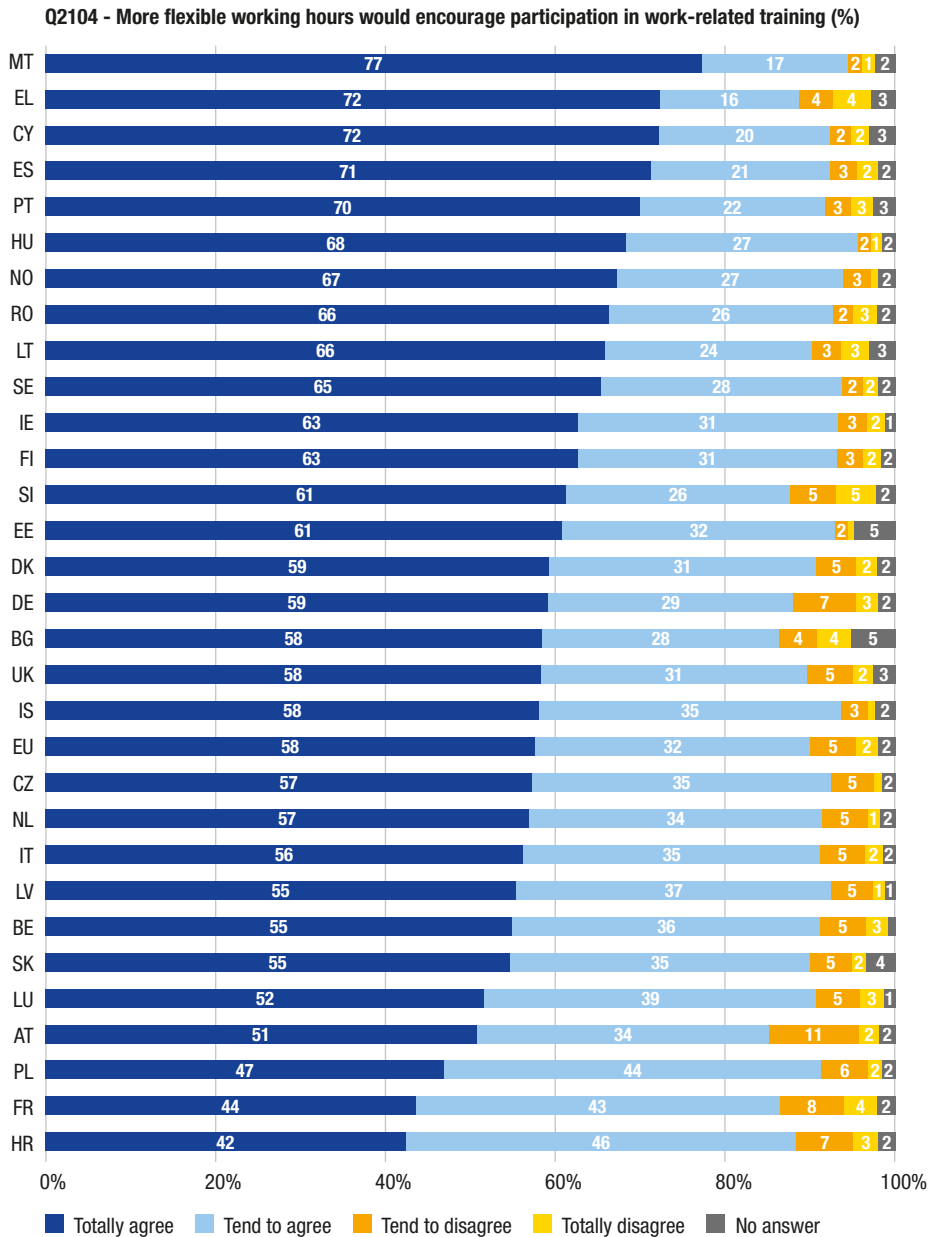
Figure 30. **Access: financial support, country**
(EU-28, Iceland and Norway)

Q2103 - Better financial incentives or support would encourage participation in work-related training (%)



Source: Cedefop opinion survey on adult learning and CVET.

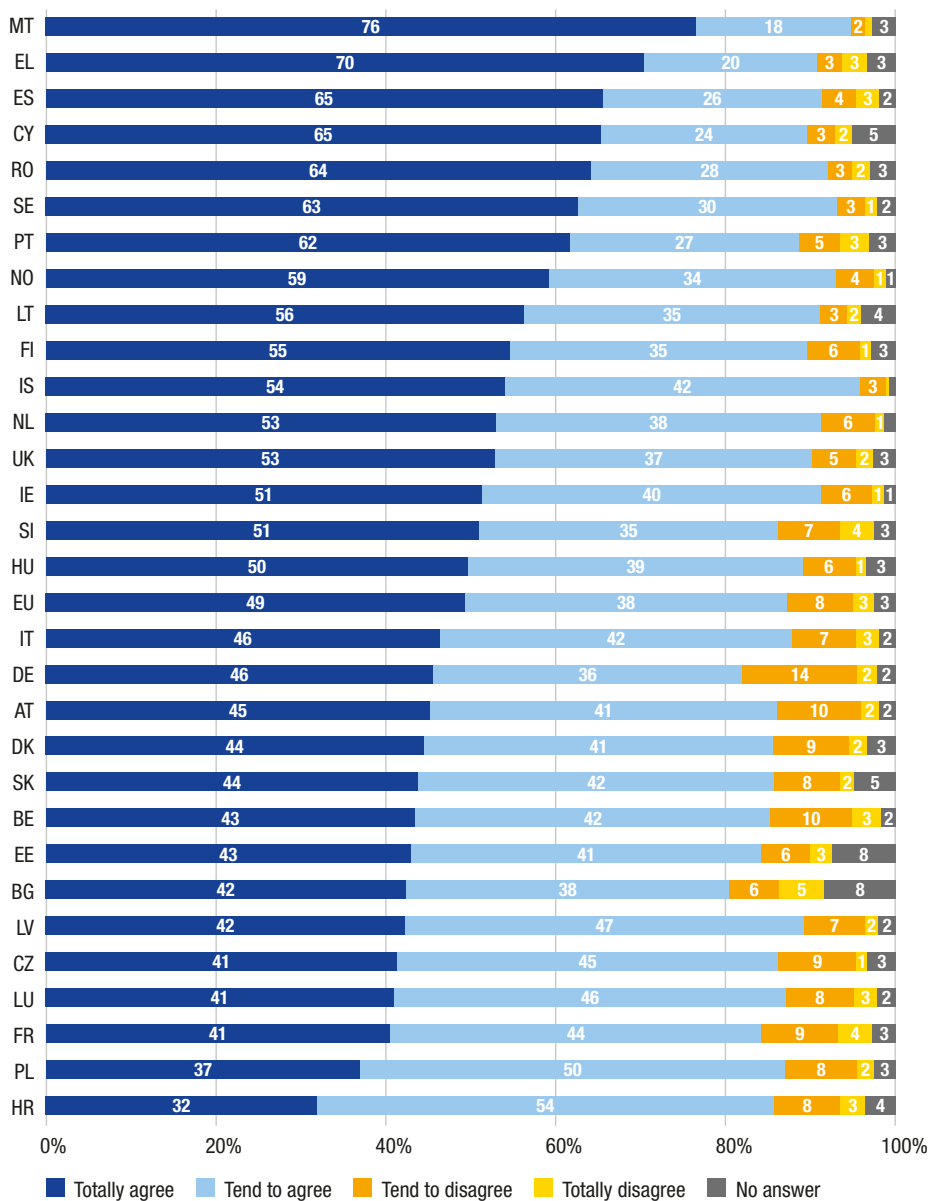
Figure 31. **Access: flexible working hours, country**
(EU-28, Iceland and Norway)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 32. **Access: adapting learning to individual needs, country (EU-28, Iceland and Norway)**

Q2105 - Better adaptability to individual learning needs would encourage participation in work-related training (%)



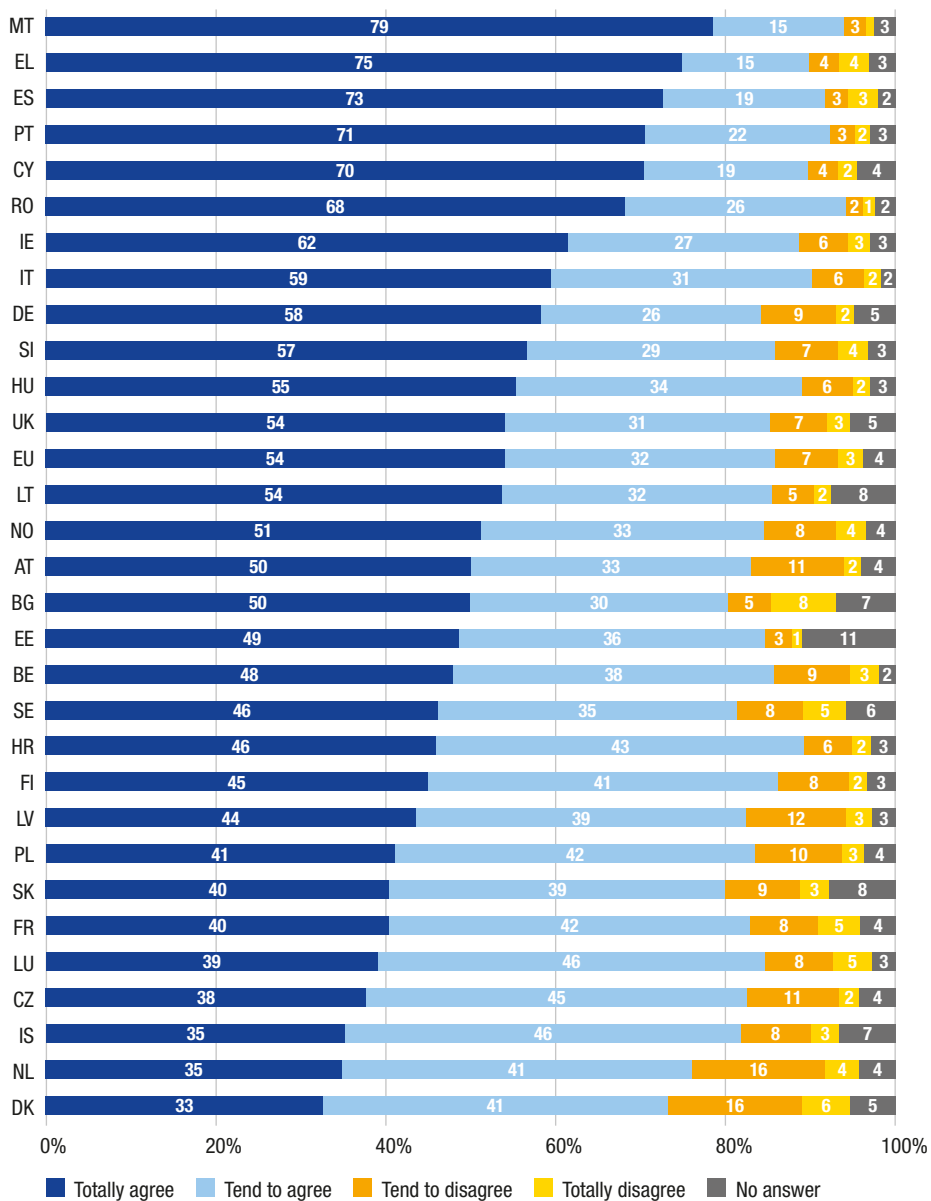
Source: Cedefop opinion survey on adult learning and CVET.

Some 54% of respondents totally agree that participation in work-related learning and training would be encouraged by support with childcare and other caring responsibilities (Figure 33). In six countries more than two-thirds of respondents totally agree: Malta (79%), Greece (75%), Spain (73%), Portugal (71%), Cyprus (70%) and Romania (68%). Denmark (22%), the Netherlands (20%) and Latvia (15%) show relatively high levels of disagreement.

Some 54% of respondents totally agree that certification of learning and training recognised by employers would encourage more adults to participate in work-related learning and training (Figure 34). Respondents in Malta (77%), Spain (74%), Greece (73%), Cyprus (72%), Portugal (71%) and Romania (69%) are the most likely to totally agree. Finland (19%) has the fewest respondents who 'totally agree'.

Figure 33. **Access: support with childcare, country (EU-28, Iceland and Norway)**

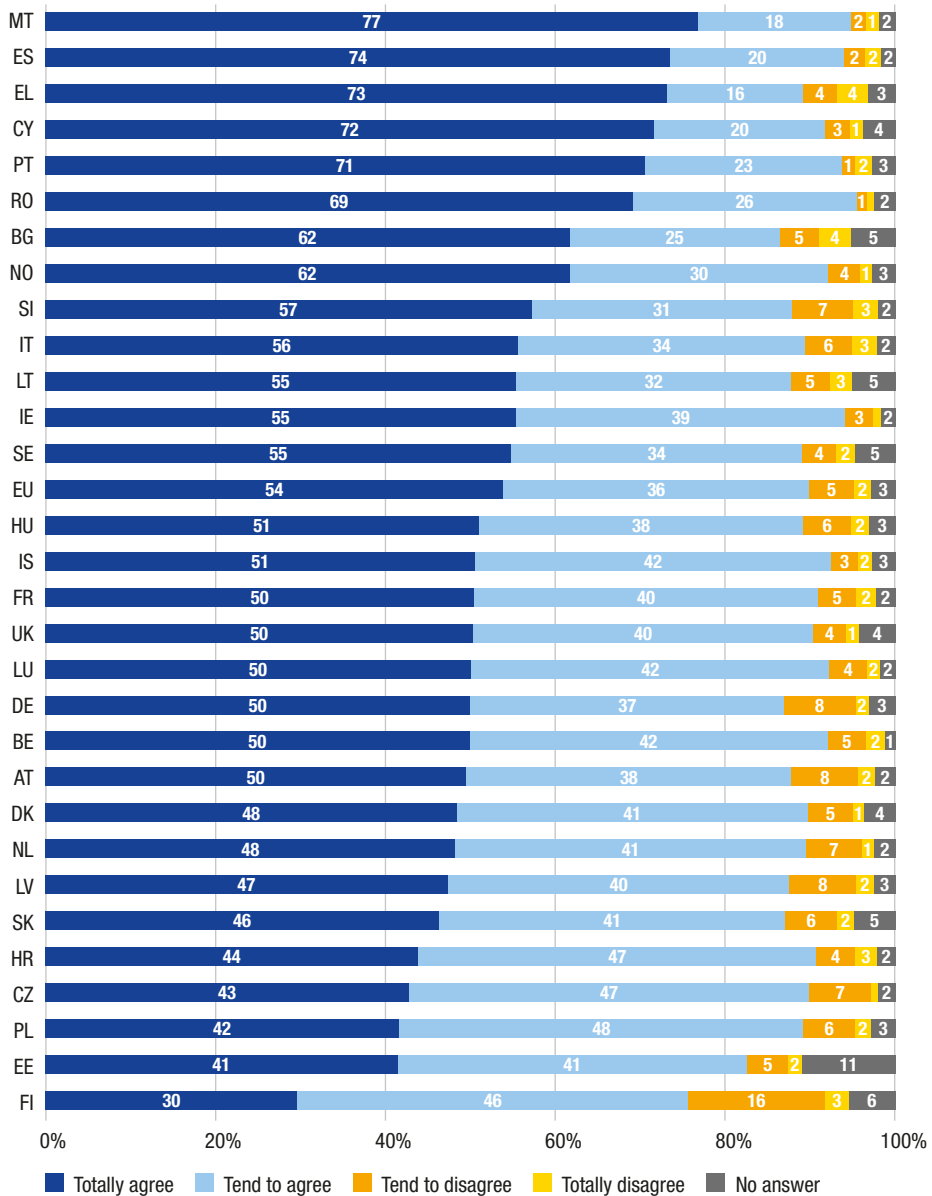
Q2106 - More support with social and family responsibilities would encourage participation in work-related training (%)



Source: Cedefop opinion survey on adult learning and CVET.

Figure 34. **Access: learning certificates recognised by employers, country (EU-28, Iceland and Norway)**

Q2107 - Recognition of certificates by employers would encourage participation in work-related training (%)



Source: Cedefop opinion survey on adult learning and CVET.

CHAPTER 5.

Perceptions: image

Chapter 5 outlines observations on the perceived importance and benefits of adult learning and continuing vocational education and training (CVET) as well as access to them. It also discusses some key findings about their image from the survey data.

5.1. Importance

In all Member States respondents strongly believe that learning throughout life is important for their personal development and work. In each country, at least 70% of respondents say that adult learning and CVET will be more important to career progression in 10 years' time, ranging from 93% in Malta to 72% in Slovakia.

In each country, at least two-thirds of respondents agree their government should prioritise investment in learning for adults in their country, ranging from 98% in Malta, 96% in Romania, 92% in Greece and 91% in Cyprus to 74% in Finland, 70% in Estonia and 68% in Iceland.

Across all Member States, respondents who participated in learning in the past year were asked why. When given the option of multiple answers, the two most common reasons respondents gave for participating in adult learning and CVET were personal development and to improve job skills. Respondents gave these reasons for all types of learning: organised; done on one's own; and work related or not. Other important reasons for participation were to improve basic and computer skills.

Underlining the importance of job skills, the survey found that 88% (including 63% who totally agree) of all respondents who were in work at the time of the survey agree that their job requires them to keep their skills constantly up to date. This ranges from 94% in Sweden and Norway, to 84% in Latvia and Romania and 81% in Slovakia. Further, respondents from all Member States say that they lack technical and general skills.

Some 28% of all respondents in work say that they lack some technical skills and 22% some general skills to carry out their job at the required level.

Respondents are most content with their level of technical skills in Italy (92%) and Iceland (88%) and with their general skills in Finland and Iceland (both 91%), and Italy (88%). Portugal is the only country where most respondents say that they lack some technical (51%) and general skills (52%) for their job, but significant minorities say the same in Cyprus (46% technical; 40% general) and Luxembourg (45% technical; 41% general).

5.2. Benefits

Member States' provision of adult learning and CVET has a positive image. It is seen as having various employment-related benefits and as important for personal development and further educational attainment.

5.2.1. Employment related benefits

There is strong and widespread agreement in all Member States that adult education and CVET are important to: career progression (91% of respondents); finding a new job (also 91%); obtaining a better income (86%); and reducing unemployment (84%). Some 84% of all respondents also agree that organised work-related training is important to develop skills for any job.

Malta, Romania and Greece (except on the question of reducing unemployment) are the most positive about these employment-related benefits. Respondents in Italy are among the least positive; 18% of respondents in Italy do not agree that adult learning and CVET are important to career progression.

Further, 21% of respondents in Estonia and Italy do not agree that work-related organised training is important to develop skills for use in any job.

Some 25% of respondents in Finland, 21% in Italy and 19% in France do not see adult learning and CVET as a route to a better income. Italy (23%) and Greece (20%) are the two countries that disagree most that adult learning and CVET help to reduce unemployment. However, Denmark (13%) is the only country where more than one in 10 respondents disagree that adult learning and CVET are important when looking for a new job.

5.2.2. Personal development and further educational attainment

Some 96% of respondents agree that adult learning and CVET are important for personal development.

Adult learning and CVET are regarded as being as important as education at school and university by 83% of respondents. Malta and Romania (both 92%) are the most positive, Estonia (66%) and Croatia (75%) the least.

Some 73% of all respondents regard adult learning and CVET as a route to a traditional degree, ranging from 84% in Romania and 83% in Malta, to 53% in Italy and 39% in Estonia. Further, 75% of respondents regard adult learning and CVET as primarily for adults who do not have a degree. This view is strongly held in Romania (91%), Greece (88%) and Malta (86%); fewer agree in Czechia (59%) and the Netherlands (44%).

In a sign that systems are becoming more flexible, some 73% of all respondents agree that organised work-related training activities can be used to obtain qualifications recognised by the state. Agreement ranges from 87% in Romania and 85% in Malta, to 54% in Iceland and 56% in Estonia. Further, 78% of respondents agree that there are many ways for adults to obtain a state-recognised degree. Agreement is highest in Germany and Malta (both 86%) and lowest in Slovakia (66%) and Croatia (60%).

5.2.3. Quality of adult learning and continuing vocational training

In all countries, respondents are more likely to describe adult learning and CVET as good rather than bad, except in Italy where 43% say it is good and 48% bad.

Very good ratings are highest in Malta (58%), Ireland (30%) and Austria (23%). Along with Italy, more than a third of respondents in Greece (40%) and Croatia (35%) rate the quality of adult learning and CVET in their country as bad.

5.3. Access

Overall, information provision in Member States about adult learning and CVET opportunities is good; most respondents in all countries seem aware of the opportunities available.

Some 72% of respondents agree that there are many adult learning and CVET opportunities in their country, ranging from 93% in Sweden and 90% in Malta, to 56% in France and 54% in Italy. Perceptions that suitable work-related training activities are easily available are lower. Some 61% of respondents agree that they are easily available, ranging from 78% in Romania, 76% in Malta and 72% in Sweden, to 52% in France and 45% in Italy.

Most respondents (55%) have looked for information on adult learning and CVET opportunities in the 12 months prior to the survey. The highest proportion of respondents looked in Czechia and Spain (both 66%) and fewest in Denmark (42%) and France (34%). Most respondents (66%) also agree that information is easy to find. Respondents in Malta (85%), Romania (82%) and Ireland (both 82%) are most likely to agree, in contrast with Italy (56%), Spain (55%) and France (45%).

When given the option of multiple answers, respondents said that the internet is the best source of advice about adult learning and CVET in all countries except Romania, where professional or sector associations come first. Taken together, the answers indicate that people combine sources, using the internet as a first contact point and to filter information. How different sources are combined varies considerably between countries.

Member States provide various types of support to encourage people to participate in adult learning. However, 52% of respondents said that family and friends was the principal source of support. This was the number one support mechanism in almost all countries. Exceptions are: the Netherlands (60%), the UK (53%) and Norway (46%), where an employer is regarded as most likely to offer support; France (42%), where professional or sector associations are the principal source of support; and Luxembourg (60%), where government is the most frequent response.

Countries vary in their perceptions of government's role in providing support for training. Respondents most likely to say that government would offer support are in Luxembourg (60%), Belgium (48%), Ireland (47%) and Germany (44%); fewer than one in 10 respondents say this in Croatia, Lithuania and Slovakia (all 6%), Estonia and Slovenia (both 7%) and Bulgaria (8%).

In 22 countries, the reason given most frequently for not taking part in organised training is that respondents feel they do not need it. Finland (56%) has most respondents that say they do not participate in adult learning and CVET because they have no need. However, it is also the country where fewest respondents say that they lack technical or general skills for their jobs. In Bulgaria, Greece, Spain, Ireland and Malta the main reason for not participating is problems with time; in Romania (37%) and France (36%) it is feeling too old. These seven countries are all above the EU average in the number of respondents who say that they lack technical or general skills.

There is widespread support for measures proposed to encourage participation in adult learning and VET. For example, Ireland (94%), France

(92%), Italy (92%) and Hungary (92%) all strongly support better information and guidance. Many in Spain (95%) and Italy (92%) say improving quality would encourage participation. Hungary (94% and 95% respectively) has the highest number of respondents supporting financial incentives and flexible time arrangements to encourage participation. In Austria (96%), Denmark (92%) and the UK (90%) adapting learning to individual needs is a key issue as is support for childcare in Portugal (95%) and Spain (92%). Certification and recognition of learning is important for several countries, including Belgium (92%), Denmark (89%), Germany (87%), Luxembourg (92%), Portugal (94%) and the UK (90%).

5.4. Image

5.4.1. A positive image of adult learning and CVET

Respondents in all Member States are positive about adult learning and CVET, which they see as bringing benefits for career progression, personal development and further educational attainment.

These positive views also appear to be deeply held, widely shared and reinforced by family and friends, who are major supporters of decisions to participate. They are also consistent; people's motivation for supporting adult learning and CVET is linked to the benefits they expect to receive from them. Such positive views can also be expected to last. Most respondents across all Member States believe that adult learning and CVET will be more important, particularly for career progression over the next 10 years, and that they should be a priority for government investment.

Adult learning and CVET matter and their positive image extends to perceptions of availability and access. Generally, Member States have made information easy to find through many different sources, which people use to various degrees and combine in different ways in different countries.

There are differences in emphasis between countries. Overall, respondents are particularly positive about the benefits of adult learning and CVET in Malta, Cyprus, Romania and Greece, but less so in Italy, Estonia and Croatia.

Views on different aspects of adult learning and CVET also vary. In Malta and Romania, respondents are also positive about quality, availability and access. Respondents in Sweden are positive about the availability and quality of adult learning and CVET; Ireland is also positive about quality.

Respondents in France, Spain and Italy are relatively negative about access to and the availability of adult learning and CVET. In Greece, too, positive views about learning in general are offset by criticisms of access and availability. In Italy, Lithuania and Latvia respondents are critical about quality. Iceland is least positive about access to work-related training.

However, it is important to note that the main differences between 'positive' and 'less positive' is because fewer people 'totally agree' rather than simply 'agree'. For example, in no country does the combined total of 'totally agree' and 'agree' fall below 78% for the perception that adult learning and CVET help career prospects, finding a new job and obtaining a better income.

It is unsurprising that, generally, people see adult learning and CVET as 'good things'. The relative differences identified in the survey reflect relative strengths and weaknesses in their systems for Member States to consider.

For example, high levels of support in all Member States for each measure to encourage people to participate in adult learning and CVET (better information, improving quality, financial incentives, flexible learning arrangements, adapting learning to individual needs, help with caring responsibilities and certification and recognition of learning) indicate scope for Member States either to introduce, widen access to, or raise awareness of them.

It is also important to note that the survey findings report on perceptions; the image may not reflect the reality, in which case misconceptions need to be corrected.

5.4.2. Image and participation

The survey is clear that concerns about not enough people taking part in adult learning and CVET are not because people have a negative image about them.

Despite respondents being clear about their need to constantly update their job-related skills, their concerns over lacking technical and general skills and their strong commitment overall to personal development, the survey reflects that the main reason people do not participate in adult learning and CVET is because they see no need to do so.

However, the survey strongly indicates that seeing no need for adult learning and CVET is not because people hold them in low esteem. Adult learning and CVET may not quite have the same status as tertiary education, but they are highly valued. They are increasingly seen as a necessity. However,

this 'necessity' is seen in general, abstract terms. It can be expressed as people recognising a general need for adult learning and CVET, but they are not necessarily a need for 'me', at least not at this moment.

Consequently, the issue of attractiveness of and participation in adult learning and CVET is not lack of esteem, but of incentive.

The various benefits of adult learning and CVET are interrelated. Learning motivated for personal development can improve career prospects and vice versa. However, any incentive to participate depends on the likelihood of the desired benefits, which people perceive as real, being realised.

The benefits of participating in adult learning and CVET for personal development are defined by the individual and outcomes are in their control. However, although people see adult learning and CVET as helping career progression, job search and better incomes, realising these benefits is generally not in the hands of participants or governments, but of employers. Government measures can encourage people to participate in adult learning and CVET and such measures are needed, but they do not guarantee a job, promotion, or a pay rise.

Governments have more control of certification and recognition of adult learning and CVET. Certification and recognition can be an incentive for learning for personal development and for employment; skills that are certified and visible have more currency on the labour market.

Consequently, in European policy terms, the argument is that government measures to encourage participation need to be linked, not with abstract notions of some general good or deferred reward, but with tangible benefits such as a job or a qualification, or both.

Further, the attractiveness of adult learning and CVET is not only about people's willingness to participate, but also employers' willingness to invest. Employers across Europe say they have difficulties finding the skills they need. However, the impact of technological change on job tasks is creating a tension in adult learning and VET over the balance between the core skills, which employers say they want, and the job-specific skills that employers expect CVET in particular to provide. More opportunities for work-based learning for adults may not only increase participation, but also help resolve that tension.

Abbreviations/Acronyms

BE	Belgium
BG	Bulgaria
CZ	Czechia
DK	Denmark
DE	Germany
EE	Estonia
IE	Ireland
EL	Greece
ES	Spain
FR	France
HR	Croatia
IT	Italy
CY	Cyprus
LV	Latvia
LT	Lithuania

LU	Luxembourg
HU	Hungary
MT	Malta
NL	Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	United Kingdom
IS	Iceland
NO	Norway

AL	adult learning
CVET	continuing vocational education and training
NUTS	nomenclature of territorial units for statistics
VET	vocational education and training
RDD +3	random digit dialling +3

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Website

- Cedefop project page on adult learning and continuing vocational education and training: www.cedefop.europa.eu/en/events-and-projects/projects/adult-learning-empowering-adults-through-upskilling-and-reskilling

ANNEX 1.

Methodology

Kantar conducted a survey of the public about adult learning and continuing vocational education and training (CVET) in the EU-28 European Member States, Iceland and Norway on behalf of Cedefop. A total of 40 466 telephone interviews were conducted among people aged 25 years old and over.

This large-scale survey covered the following topics associated with adult learning and CVET: respondents' working situation; general attitudes towards learning; participation in and experience of adult learning and CVET; and perception of adult learning and CVET in the respondents' country.

Fieldwork took place between 20 May and 16 July 2019; the dates and number of interviews per country are set out in the table below:

Country	Target N of interviews	Interviews achieved	Country	Target N of interviews	Interviews achieved
BE	1 200	12 002	LU	500	500
BG	2 000	2 005	HU	1 700	1 704
CZ	1 300	13 002	MT	700	703
DK	1 000	1 008	NL	1 000	1 010
DE	1 700	1 700	AT	1 000	1 000
EE	1 000	1 000	PL	2 000	2 000
IE	1 000	1 002	PT	1 300	1 302
EL	1 700	1 701	RO	2 000	2 001
ES	1 700	1 701	SI	1 300	1 302
FR	1 700	1 701	SK	2 000	2 001
HR	2 000	2 001	FI	1 000	1 000
IT	1 700	1 701	SE	1 000	1 004
CY	1 000	1 006	UK	1 000	1 001
LV	1 700	1 706	IS	500	500
LT	1 700	1 700	NO	1 000	1 000
Target N of interviews			Interviews achieved		
Total	40 400		40 466		

A1.1. Sampling

The target population comprised the adult population (aged 25 and over) living in a private residence in one of the EU-28 Member States, Iceland or Norway.

A person's usual residence was defined as the place where they normally sleep. In addition, they should have lived in the country for the six months prior to the survey, speak the national language(s) well enough to respond to the questionnaire and not live in an institution (such as prisons, military barracks, hospitals and nursing homes). Only one person per household was selected for interview. For each country/territory, samples were representative of the covered universe. The survey used only random procedures.

An overlapping dual phone approach (mobile and landline) was used in all countries, except in Finland, Iceland and Norway. In these countries, their respective population registers, which offer comprehensive coverage of their populations using all phone numbers (landline and mobile), were used as frames.

In all countries, dual random digit dialling (RDD) frames were used. The sampling frame for selecting landline and mobile phone numbers was a Kantar database of so-called seed numbers (or source numbers). These numbers were obtained either from existing telephone databases, which are stratified geographically at NUTS 2 level or equivalent, or collected during representative face-to-face interviews carried out as part of the overall quality control procedures. Given that these numbers are collected from nationally representative samples, stratified at NUTS 2 level or equivalent, they become in turn a representative sample of numbers.

'Seed numbers' were not used as such and so there were no personal data protection issues. They were used only to develop a perfectly random sampling strategy, known as 'Random Digit Dialling +3' (RDD+3). This procedure consists simply in changing the last three digits of a 'source' number by adding three units to it. Sampling using an RDD+3 method is a tried and tested system for selecting phone numbers not listed in directories. This enables us to cover potentially all the public and not only those who have agreed to provide their phone number(s).

The level of stratification affects the importance of the sampling bias in the survey. In a multi-country survey, it is essential to ensure consistency at every stage of the process. Accordingly, fixed and mobile frames were stratified by region and urbanisation before drawing an equal probability sample from each stratum to approximate a geographically representative

sample. The fixed line sample was stratified by NUTS 1 regions in Germany, Italy and the UK, NUTS 3 regions in Ireland, Croatia, Latvia, Lithuania and Slovenia, and NUTS 2 regions in all other countries. In the smallest countries (Cyprus, Luxembourg and Malta) the sample was stratified by LAU 1 ⁽¹²⁾.

A1.2. Fieldwork monitoring and quality controls

Fieldwork was centrally managed and supervised by the Kantar lead team in Brussels. All aspects of sampling, questionnaire translation, fieldwork monitoring (quality and progress) and final data analysis, were handled by the central team. Local national institutes were responsible solely for implementation (enumeration, interviewing and coding) and field quality checks.

Fieldwork was monitored in real time and data uploaded daily to the central server. The central coordination team closely monitored fieldwork progress to highlight immediately any potential issues. Centralised monitoring was also used to monitor response rate and ensured any corrective measures were employed in a timely manner.

Local agencies were responsible for ensuring the quality of data collected under the strict supervision of the central project management team. A minimum of 10% of interviews was validated by local teams through live listen-ins or recordings. Some interviews for each interviewer working on the project were also validated.

A combination of randomly selected interviews/interviewers and targeted interviewers/interviews, prioritised as high risk, were used to identify which respondents to recontact.

⁽¹²⁾ LAU: local administrative units.

A1.3. Contact procedures

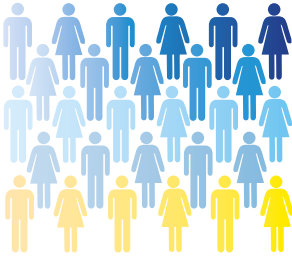
To select respondents, the following steps were followed once contact had been established:

- (a) landline sample – a household member aged 25 or over was randomly selected for interview. In households with more than one person, the ‘last birthday rule’ was applied, meaning that the selected member of the household was to be the one who had had her/his birthday most recently;
- (b) mobile sample – the person who answered was directly interviewed, once it had been established that the phone number belonged to her/him.

The respondent selection procedure was built into the CATI ⁽¹³⁾ script. All interviewers were briefed and instructed to follow selection procedures and how to fill in answers to minimise the risk of errors in the selection phase. Selection was always made among all adults aged 25 or over who lived in the household and not just those present at the time of the call.

If selected household members were not home, appointments were made to ensure a balanced sample. Once selection had taken place, it could not be changed.

⁽¹³⁾ CATI: computer-assisted telephone interviewing.



Perceptions on adult learning and continuing vocational education and training in Europe

Second opinion survey – Volume 1
MEMBER STATES

Impressions are influential. Through more than 40 000 interviews of people aged 25 and over in the European Union, Norway and Iceland, this survey explores people's impressions about adult learning and continuing vocational education and training (CVET), which are central to enabling adults acquire the knowledge, skills and competences they need to manage changing jobs and lives. This volume looks at impressions in Member States and across the EU (a second looks at views of different groups in the European adult labour force). The survey brings new insights. People in all Member States value adult learning and CVET and believe that they should be a priority for investment in their country. Low participation in adult learning and CVET is not because of negative impressions. The data are here to explore; its aim is to inform Member State strategies to strengthen adult learning and CVET.



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