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Unmasking the New Adult Learner

Presented by Jim Fong
Chief Research Officer at UPCEA®
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A few starting details

• 45-minute webinar + 15 minutes for questions and answers
• Chat and ask questions through the Zoom Control Panel
• Check your inbox for the webinar recording and slide deck
• Complete the post-webinar survey
Jim Fong,
Chief Research Officer

UPCEA’s Center for Research &
Marketing Strategy
Unmasking the New Adult Learner

September 2022

Jim Fong
Traditional Education On the Decline

Higher education must change to focus in on the new learners and adapt to their unique situations...

- Enrollment for UG and graduate students decreased by 4.1% in 2022 compared to 2021.
- Just 6 in 10 Americans recently surveyed stated that college is worth the time and money.
- The number of high school graduates enrolling in college has decreased 7% (from 70% to 63%) nationwide.
- More than 4 in 10 bachelor’s degree holders under 45 did not agree that the benefits of education exceeded the costs.
- The proportion of 14- to 18-year-olds who think postsecondary education is necessary dropped 15%.
- The inflation-adjusted average cost of a 4-year college education has doubled since 1974 and is up 66% for a 2-year.

Source: https://hechingerreport.org/how-higher-education-lost-its-shine/
https://www.insidehighered.com/views/2022/08/16/higher-ed-must-change-or-die-opinion#.YvuaxFjClzY.linkedin
Traditional College Education Has Struggled Over the Past Decade

![Historical College Enrollment Chart]

Education Data Initiative source: National Center for Education Data Statistics
Despite Favorable High School Graduation Rates and Volume of Students
The Outlook or Pipeline for Traditional Age Students is Not Favorable

Total U.S. High School Graduate Growth Slows, then Declines

... And Could Get Worse Over Time

Source: Census Bureau
U.S. Adult Population At A Glance

The market for the adult learner is growing and evolving in the U.S., while the traditional student is shrinking...

Total U.S. Population: 331.4M people

Higher Education focuses on 19.4 million students (or 6% of the population)

- 11.9M are full-time
- 7.5M are part-time
- 16.2M are UG
- 3.1M are grad. students

Eligible Higher-Ed Adults Represent 78% of the population: 258.3M
Options for Higher Education

Highlighting the new adult learner population for higher-educational market opportunities...

**Marketable New Adult Learners vs. Traditional Student Population**

1. Traditional Student (Undergraduate) - 16.2 Million
2. Some College, No Degree - 39 Million
3. Age 25+ with A Degree - 93 Million
4. Have A High School Degree/GED - 70 Million
5. No High School Degree/GED - 40 Million

# of Adults: *in millions

Source: National Student Clearinghouse
Who Are Our New Adult Learners?

New Adult Learner

1. Valentina (21)
   Gen Z Customer-Service Rep

2. Max (22)
   Gen Z Mechanics Contractor

3. Elise (24)
   Young Millennial Team Manager

4. Chen (25)
   Young Millennial Executive Assistant

5. Carla (28)
   Mid-Millennial Public Service Rep

6. Chris (31)
   Mid-Millennial Technician

Disengaged Learner (some college, no degree)

7. Kaylie (23)
   Gen Z/Young Millennial Associates Degree
   Full-time front-desk rep at a hotel

8. Mateo (19)
   Gen Z/Young Millennial
   Didn’t complete college
   Part-time customer service rep at a retail store

9. Carla (28)
   Mid-Millennial
   Graduate Degree
   Team manager in a large telecom firm

10. Chris (31)
    Mid-Millennial
    High School/GED
    Between career paths, seeking employment

11. Shauna (42)
    Millennial/Gen X'er
    Bachelor's Degree
    Sales rep at a large pharma company

12. Phil (37)
    Millennial+
    Bachelor's Degree
    Government contractor

Mature Adult Learner

13. Madeline (52)
    50 to 55 years-old
    Employed full-time

14. Joshua (57)
    56 to 60 years-old
    Unemployed

15. Norman (63)
    61 to 65 years-old
    Retired in 2020

16. Lisa (71)
    Over 65 years-old
    Retired in 2012
Options for Higher Education

Highlighting the new adult learner population for higher-educational market opportunities...

**Marketable New Adult Learners vs. Traditional Student Population**

- **Traditional Student (Undergraduate)**: 16.2 Million
- **Age 25+ with A Degree**: 93 Million
- **Have A High School Degree/GED**: 70 Million
- **No High School Degree/GED**: 40 Million
- **Some College, No Degree**: 39 Million

*in millions

Source: National Student Clearinghouse
To better understand the situations and motivations of disengaged learners, UPCEA and StraighterLine developed a survey...

**Survey Goal**

The goal of the survey is to understand the situations and motivations of disengaged learners in those who have college credits but are no longer enrolled.

**Survey Demographics**

The target demographic is among learners age 20-34 and took place between April 30th and May 12th, 2021.

**Survey Logistics**

Many of the respondents that indicated that they were enrolled in a college or university or were out of the target age range were removed from the study.

**In Total...**

3,236 individuals participated in the survey, of which **1,021** met all qualifications of the study.
Who Are the Disengaged Learners?

1. **Valentina (21)**  
   Gen Z Female  
   - **Job-Title**: Customer-Service Rep  
   - **College-Level**: Dropped Sophomore Yr.  
   - **Field of Study**: Arts  
   - **Last Time Enrolled**: 2019  
   - **Engagement Level**: Newly Disengaged  
   - **Future Career Goals**: Valentina wants to pursue a higher arts degree and eventually get her MFA

2. **Max (22)**  
   Gen Z Male  
   - **Job-Title**: Mechanics Contractor  
   - **College-Level**: Dropped Freshman Yr.  
   - **Field of Study**: Healthcare  
   - **Last Time Enrolled**: 2020  
   - **Engagement Level**: Newly Disengaged  
   - **Future Career Goals**: Max wants to start his own contractor company

3. **Elise (24)**  
   Young Millennial Female  
   - **Job-Title**: Team Manager  
   - **College-Level**: Dropped Junior Yr.  
   - **Field of Study**: Business  
   - **Last Time Enrolled**: 2017  
   - **Engagement Level**: Intermediately Disengaged  
   - **Future Career Goals**: Elise wants to advance her career in the sales department

4. **Chen (25)**  
   Young Millennial Male  
   - **Job-Title**: Executive Assistant  
   - **College-Level**: Dropped Sophomore Yr.  
   - **Field of Study**: Comp. Sci.  
   - **Last Time Enrolled**: 2015  
   - **Engagement Level**: Intermediately Disengaged  
   - **Future Career Goals**: Chen wants to advance his degree in comp sci. and eventually get his MBA

5. **Carla (28)**  
   Mid-Millennial Female  
   - **Job-Title**: Public Service Rep  
   - **College-Level**: Dropped Senior Yr.  
   - **Field of Study**: Business  
   - **Last Time Enrolled**: 2013  
   - **Engagement Level**: Long-Term Disengaged  
   - **Future Career Goals**: Carla wants to get a public service certificate to become a team lead

6. **Chris (31)**  
   Mid-Millennial Male  
   - **Job-Title**: Technician  
   - **College-Level**: Dropped Junior Yr.  
   - **Field of Study**: Education  
   - **Last Time Enrolled**: 2007  
   - **Engagement Level**: Long-Term Disengaged  
   - **Future Career Goals**: Chris wants to take over his technician business and earn a higher salary
## How Do They Differ?

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<td>Employed</td>
<td>71%</td>
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<td>61%</td>
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<td>Satisfaction with Previously Enrolled Institution (% Extremely/Very Satisfied)</td>
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<td>42%</td>
<td>50%</td>
<td>48%</td>
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<td>Level of Engagement with Previous Institution (% Extremely/Very Engaged)</td>
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<td>36%</td>
<td>48%</td>
<td>44%</td>
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<td>Reengagement Since Leaving Institution (% Yes)</td>
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<td>13%</td>
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<td>6%</td>
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<td>Likelihood to Continue Education (% Extremely/Very Likely)</td>
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<td>42%</td>
<td>59%</td>
<td>48%</td>
<td>46%</td>
<td>29%</td>
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<tr>
<td>Likelihood of Reenrollment at Institution (% Extremely/Very Likely)</td>
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<td>33%</td>
<td>38%</td>
<td>29%</td>
<td>26%</td>
<td>18%</td>
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<tr>
<td>Effectiveness of: Providing Subsection Courses at Lower Cost (% Extremely Effective)</td>
<td>39%</td>
<td>40%</td>
<td>67%</td>
<td>30%</td>
<td>37%</td>
<td>36%</td>
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<tr>
<td>Effectiveness of: Providing Certificate for Credits Earned (% Extremely Effective)</td>
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<td>50%</td>
<td>43%</td>
<td>30%</td>
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<td>46%</td>
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<td>Effectiveness of: Providing Workshops to Address Student Struggles (% Extremely Effective)</td>
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<td>30%</td>
<td>37%</td>
<td>50%</td>
<td>27%</td>
<td>39%</td>
</tr>
<tr>
<td>Effectiveness of: Providing Counseling to Reengage Students (% Extremely Effective)</td>
<td>23%</td>
<td>20%</td>
<td>40%</td>
<td>20%</td>
<td>25%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Key Insights

A summary of the key insights learned so to better adapt to the Disengaged Learner...

- There are gender differences regarding career goals and self-esteem.

- The reasons they leave and the factors that may draw them back are very different, i.e. “fit,” “financial” and “family”

- There are new hurdles to overcome in terms of re-engaging them, mostly financial and value related.

- Institutions will have to create a more student-centric approach to re-engaging them. Doing the same thing over and over again is not likely to encourage them.

- Smaller successes and modular learning could increase the potential for re-entry.
How Can Institutions Prepare to Re-Engage These Learners?

Valentina (21)
Gen Z Female

As a Gen Z female, Valentina ultimately had to leave her institution due to family/personal problems. She would value a workshop to address her struggles with her family, and also is looking to be re-engaged with quickly after her withdrawal.

Max (22)
Gen Z Male

Max began to feel disinterested in the field of study he was learning and decided that higher-education was not for him. To appeal to his needs, he would like to see the institution offer more engaging content through a subsection of low cost courses.

Elise (24)
Young Millennial Female

Elise had to deal with a personal emergency in her family’s business and had to unenroll temporarily. To help re-engage her, Elise would like to see counseling services to help her work through some of her issues. Institutions should reach out to Elise fairly quickly after her withdrawal to aid her.

Carla (28)
Mid-Millennial Female

Carla had to leave her institution to find a more stable source of income with a new job. It is difficult to re-engage Carla because of her financial and familial obligations so she would value a part-time certificate course program to help her gain additional skills while still supporting her family.

Chen (25)
Young Millennial Male

As a young millennial male, Chen ran into financial issues when his college funds ran out. He does not have the means to support himself, so he is looking for his institution to bring in specialized services to help him navigate.

Chris (31)
Mid-Millennial Male

Chris has been out of school for some time and requires engagement consistently and persistently in order to re-engage him. Some of the needed strategies and tactics include counseling services and providing lower cost courses.
Highlighting the new adult learner population for higher-educational market opportunities...

Marketable New Adult Learners vs. Traditional Student Population

- **Traditional Student (Undergraduate)**: 16.2 Million
- **Age 25+ with A Degree**: 93 Million
- **Have A High School Degree/GED**: 70 Million
- **No High School Degree/GED**: 40 Million
- **Some College, No Degree**: 39 Million

Lost 18-to-22 year-olds students?

Options for Higher Education

Source: National Student Clearinghouse

*in millions
# The New Adult/Professional Learner Will Come from Many Places

According to NSC, more than **39 million** Americans have attended college but have not completed their degree*...

*Source: National Student Clearinghouse

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**专业教育与职业增强者**

- **MOOC参与**与全球市场预测**在2022年达到1520亿美元。**
- **220M参与者**在2021年与2019年的120M相比。

**新通勤者**

- 不再通勤作为更经济的选择，成年学习者可能更愿意上网。他们有更多的选择。
- 很多可能仍然18-22岁。

**新传统者**

- UPCEA研究与InsideTrack显示，更多高中生立即参加全部在线学位项目。
- 2018年，2%的学生被调查为18至22岁的年龄。
- 2020年，这个数字增加到5%。

**军事**

- **19.4百万**现役或退伍军人学生在美国。
- 大约650,000人自2013年以来被释放。
- 58%的以前的犯人没有完成他们的高中文凭/GED课程。

**校友**

- **650,000+人**在一年中从监狱释放，7M+被释放。

**之前被监禁者**

- **650,000+人**在一年中从监狱释放，7M+被释放。
- 58%的前犯人没有完成他们的高中文凭/GED课程。

**新通勤者**

- 莱克树研究（2022年）显示，超过三分之一的在线学生住在家更远的地方。

**来源：**

- UPCEA InsideTrack Surveys
- World Population Review; Census Bureau; U.S. Dept. of Defense
- UPCEA Snap Poll
- U.S. DOJ; Prison Policy

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MOOC参与已几乎**双倍增长**自2019年。

全球MOOC市场的销售额在2022年预计**超过1520亿美元**。

**220M参与者**在2021年与2019年的120M相比。

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**来源：**

- Class Central; Global News Wire
- Wiley, Voice of the Online Student, 2022
- UPCEA InsideTrack Surveys
- World Population Review; Census Bureau; U.S. Dept. of Defense
- UPCEA Snap Poll
- U.S. DOJ; Prison Policy
New Adult Learner Survey & Study

White Paper Link
Survey Methodology & Objective

To better understand the motivations of various adult learner segments UPCEA and Thinking Cap developed a survey...

Survey Goal
The goal of the survey is to understand generational differences, as well as behavioral and demographic differences, among new learners.

Survey Demographics
The target demographic is among new learners age 18 to 45 years and took place between April 30th and May 13th of 2021.

Survey Logistics
An internet panel was used for the study. Assuming a random sample, the error margin is plus or minus 3.4% at 95% confidence.

In Total...
1,413 individuals participated in the survey, of which 813 met all qualifications of the study.
Who Are Our New Adult Learners?

Kaylie (23)
Gen Z/Young M Female

Mateo (19)
Gen Z/Young M Male

Carla (28)
Mid-Millennial Female

Chris (31)
Mid-Millennial Male

Shauna (42)
Millennial+ Female

Phil (37)
Millennial+ Male

**Highest Education**
- Kaylie: Associates Degree
- Mateo: Didn’t complete college
- Carla: Graduate Degree
- Chris: High School/GED
- Shauna: Bachelor’s Degree
- Phil: Bachelor’s Degree

**Employment**
- Kaylie: Full-time front-desk rep at a hotel
- Mateo: Part-time customer service rep at a retail store
- Carla: Team manager in a large telecom firm
- Chris: Between career paths, seeking employment
- Shauna: Sales rep at a large pharma company
- Phil: Government contractor

**Favorite Brand**
- Kaylie: Loves shopping at Zara for her clothes
- Mateo: Is an avid buyer of Nike products
- Carla: Uses Twitter often to keep up to date with news and trends
- Chris: Browses YouTube often in his down time
- Shauna: Loves using Facebook to hear about her friends’ lives
- Phil: Enjoys buying and selling collectibles on eBay

**Motivation for New Learners**
- Kaylie: Wants to become the manager of her hotel location.
- Mateo: Wants to enter the full-time job market.
- Carla: Wants to advance her career to be a senior director.
- Chris: Is interested in a new role and is seeking out higher salary opportunities.
- Shauna: In obtaining a higher degree to advance her career.
- Phil: Wants to learn additional skills and business acumen to launch his eBay resale business.
## How Do They Differ?

I need to understand what preparedness mean. Also, didn’t we have differing viewing habits with men?

<table>
<thead>
<tr>
<th></th>
<th>Kaylie (23)</th>
<th>Mateo (19)</th>
<th>Carla (28)</th>
<th>Chris (31)</th>
<th>Shauna (42)</th>
<th>Phil (37)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed</td>
<td>62%</td>
<td>81%</td>
<td>53%</td>
<td>77%</td>
<td>54%</td>
<td>79%</td>
</tr>
<tr>
<td>Interested in Personal Advancement (% Extremely/Very Interested)</td>
<td>55%</td>
<td>60%</td>
<td>56%</td>
<td>74%</td>
<td>37%</td>
<td>52%</td>
</tr>
<tr>
<td>Higher Education Provides A Positive ROI (% Strongly Agree/Agree)</td>
<td>69%</td>
<td><strong>85%</strong></td>
<td>79%</td>
<td><strong>83%</strong></td>
<td>81%</td>
<td>77%</td>
</tr>
<tr>
<td>Colleges and Universities Can’t Keep Up with the Economy (% Strongly Agree/Agree)</td>
<td>61%</td>
<td>53%</td>
<td>54%</td>
<td>63%</td>
<td>47%</td>
<td>57%</td>
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<tr>
<td>Stackable Credentials Provide Greater Value (% Strongly Agree/Agree)</td>
<td>66%</td>
<td>60%</td>
<td><strong>74%</strong></td>
<td><strong>72%</strong></td>
<td>60%</td>
<td><strong>75%</strong></td>
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<td>Preparedness for Entering the New Economy (% Extremely Prepared)</td>
<td>18%</td>
<td>16%</td>
<td>13%</td>
<td>18%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Comfortability Gathering Information Online (% Extremely Comfortable)</td>
<td>27%</td>
<td>24%</td>
<td><strong>34%</strong></td>
<td><strong>32%</strong></td>
<td>32%</td>
<td>34%</td>
</tr>
<tr>
<td>Motivation: Advance Career (% Primary Motivation)</td>
<td>23%</td>
<td>27%</td>
<td>33%</td>
<td><strong>36%</strong></td>
<td><strong>36%</strong></td>
<td>22%</td>
</tr>
<tr>
<td>Motivation: Increase Salary (% Primary Motivation)</td>
<td>12%</td>
<td><strong>29%</strong></td>
<td>20%</td>
<td><strong>33%</strong></td>
<td>23%</td>
<td>22%</td>
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<tr>
<td>Motivation: Gain Knowledge (% Primary Motivation)</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>19%</td>
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<td>Motivation: Better Oneself (% Primary Motivation)</td>
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<td>11%</td>
<td>15%</td>
<td>15%</td>
<td>10%</td>
<td>19%</td>
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<tr>
<td>Name</td>
<td>Age</td>
<td>Gender</td>
<td>Program</td>
<td>Race/Ethnicity</td>
<td>Date of Birth</td>
<td>What personal information are they willing to share with the school?</td>
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<tr>
<td>Kaylie (23)</td>
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<td>Gen Z Female</td>
<td></td>
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<td>55.4%</td>
<td>Highest-Ed</td>
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<td>Mateo (19)</td>
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<td>63.5%</td>
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<td>56.5%</td>
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<tr>
<td>Chris (31)</td>
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<td></td>
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<td>42.3%</td>
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<td>Millennial+ Female</td>
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<td>56.0%</td>
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<td>Phil (37)</td>
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<td>Millennial+ Male</td>
<td></td>
<td></td>
<td>43.7%</td>
<td>46.4%</td>
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</table>

Females are more willing to share how they heard about the program than males.
Females, especially Gen Z, are more likely to share their race and ethnicity.

The youngest age group (18- to 22-year-olds) were least likely to want to share their first name, email address, or how they heard about the program.

The oldest male age group was most likely to say they would not provide any personal information with a school.

The more education one has the less likely they are to share their date of birth.

Avg %

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<td>51.0%</td>
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</table>

Avg %
Key Insights

A summary of the key insights learned so to better adapt to the New Adult Learner...

- We need to develop the relationship in multiple touch points, as opposed to trying to get the data we need for our purposes.

- The younger adult learner has trust issues and are easily scared away (and will ghost you).

- There are differences based on gender and stage of career, especially with return on investment (ROI). Young men question the value of education, while women see it as a way to salary equity.

- The connection to a new economy is important, as are employability and job security.

- Stackable offerings are valued.
## How Can Higher-Ed Prepare for These New Learners?

<table>
<thead>
<tr>
<th>Name</th>
<th>Age</th>
<th>Generation</th>
<th>Gender</th>
<th>Key Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kaylie</td>
<td>23</td>
<td>Gen Z/Young M Female</td>
<td>Female</td>
<td>Trusts diverse forms of media (like Instagram, YouTube etc.) more than other generations, so focusing on more social media campaigns appealing to career advancement can capture her attention.</td>
</tr>
<tr>
<td>Mateo</td>
<td>19</td>
<td>Gen Z/Young M Male</td>
<td>Male</td>
<td>Originally did not see the value in continuing higher-ed, and now wants to enter the full-time job market, it’s important to advertise to him the value of a degree. He appeals most to social media platforms as well over traditional sources.</td>
</tr>
<tr>
<td>Carla</td>
<td>28</td>
<td>Mid-Millennial Female</td>
<td>Female</td>
<td>Needs to know that the cost of programming can align with her busy schedule and other responsibilities. Due to her busy lifestyle, she prefers to receive information through online formatting and may even prefer online.</td>
</tr>
<tr>
<td>Chris</td>
<td>31</td>
<td>Mid-Millennial Male</td>
<td>Male</td>
<td>As a millennial male, feels very prepared for the new technological economy. The biggest factor as to why he chooses to pursue higher education is the cost of the program, so providing scholarships and grants for the working class is a strong point.</td>
</tr>
<tr>
<td>Shauna</td>
<td>42</td>
<td>Millennial+ Female</td>
<td>Female</td>
<td>Looking to advance her career and believes obtaining a higher education can help her get there. As a full-time employee, she also prefers to engage with higher-ed platforms through email and online videos rather than social media platforms.</td>
</tr>
<tr>
<td>Phil</td>
<td>37</td>
<td>Millennial+ Male</td>
<td>Male</td>
<td>Is confident that receiving a higher education produces a positive ROI and feels prepared for the new economy. He also prefers to receive information through email, so having a strong online presence will be beneficial in capturing his attention.</td>
</tr>
</tbody>
</table>
The Mature Adult Learner Survey & Study

White Paper Link
To better understand boomer, retiree, and mature adult learners' educational needs, preferences, qualities, and motivations, UPCEA and MindEdge developed a brief survey...

Survey Goal
The goal is to understand boomer, retiree, and mature adult learners' content needs, content delivery preferences, motivations and unique qualities to help higher education institutions further refine their portfolio of offerings and marketing strategies.

Survey Logistics
The survey took place during February 23 and 24, 2022. An internet panel was used for the study.

In Total...
997 individuals participated in the study, of which 546 completed the entire survey.
Who Are the Mature Adult Learners?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Employment Status</th>
<th>Motivation for Continuing Education</th>
<th>Perspective Towards Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madeline (52)</td>
<td>50 to 55 years-old</td>
<td>Employed full-time</td>
<td>Madeline is professionally motivated; she wants to develop new skills that will help in advancing her career and making more money.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Madeline is extremely interested in continuing her education. She values traditional modes of higher education and is interested in earning professional certifications or credentials.</td>
<td></td>
</tr>
<tr>
<td>Joshua (57)</td>
<td>56 to 60 years-old</td>
<td>Unemployed</td>
<td>Joshua is interested in continuing his learning but doesn’t care much about advancing his career or gaining additional credentials. He wants to learn new skills for his own personal enjoyment.</td>
</tr>
<tr>
<td>Norman (63)</td>
<td>61 to 65 years-old</td>
<td>Retired in 2020</td>
<td>Norman wishes to expand his knowledge and stay sharp. He seeks to continue his education for personal growth and enjoyment.</td>
</tr>
<tr>
<td>Lisa (71)</td>
<td>Over 65 years-old</td>
<td>Retired in 2012</td>
<td>Lisa is not very motivated to learn new skills or subjects or to continue her education. She is satisfied with her current state of life and doesn’t feel motivated to seek out higher education.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lisa doesn’t care much about continuing her education or expanding her knowledge. She is enjoying her retirement and does not wish to pay for educational programs.</td>
<td></td>
</tr>
</tbody>
</table>
### How Do They Differ?

<table>
<thead>
<tr>
<th>�</th>
<th>How Do They Differ?</th>
<th>Madeline (52)</th>
<th>Joshua (57)</th>
<th>Norman (63)</th>
<th>Lisa (71)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Employed</td>
<td>67%</td>
<td>42%</td>
<td>32%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Interested in Continuing Education (% Extremely/Very Interested)</td>
<td>81%</td>
<td>41%</td>
<td>67%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>Interest in an Online Delivery (% Extremely/Very Interested)</td>
<td>84%</td>
<td>55%</td>
<td>77%</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Colleges &amp; Univ. Offer the Best Programs (% Strongly Agree)</td>
<td>36%</td>
<td>7%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>If Colleges Offered Low-Cost Option (% Ext. Likely)</td>
<td>44%</td>
<td>7%</td>
<td>20%</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Cost of Program (% Extremely Important)</td>
<td>68%</td>
<td>46%</td>
<td>52%</td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td>Reputation of Provider (% Extremely Important)</td>
<td>61%</td>
<td>34%</td>
<td>52%</td>
<td>37%</td>
</tr>
<tr>
<td></td>
<td>Advance Career (% Extremely Important)</td>
<td>48%</td>
<td>9%</td>
<td>14%</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>Advance Personal Life (% Extremely Important)</td>
<td>50%</td>
<td>13%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Topics: Technology Training (% Interested)</td>
<td>66%</td>
<td>52%</td>
<td>44%</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Topics: Personal Enrich. (% Interested)</td>
<td>49%</td>
<td>35%</td>
<td>87%</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>Topics: Job Upskilling (% Interested)</td>
<td>56%</td>
<td>17%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Key Insights

A summary of the key insights learned so to better adapt to the Mature Adult Learner ...

- There is revenue potential for credit education and credentials, as well as professional development among Madeline’s segment, Generation X.

- Credit education and the perception of quality from colleges and universities appear to be correlated.

- Personal enrichment programs seem to replace career or credit education upon retirement.

- Cost is clearly an issue for this group of adult learners, but value, especially with Madeline’s segment is critical.
### How Can Institutions Prepare for These Learners?

<table>
<thead>
<tr>
<th>Persona</th>
<th>Age Group</th>
<th>Motivation</th>
<th>Education Preferences</th>
<th>Program Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madeline</td>
<td>50–55-year-old age group</td>
<td>Has a strong motivation to return to school and gain new skills to help her advance her career and increase her pay. She values traditional modes of education.</td>
<td><strong>low-cost face-to-face certificates and credentials appealing</strong></td>
<td>Hybrid/flexible programs with management and hard skills</td>
</tr>
<tr>
<td>Joshua</td>
<td>56–60-year-old age group</td>
<td>Motivated by professional development and advancement. He is looking for programming at a low-cost that will help him advance to the next level in his industry.</td>
<td>Flexible timing. To cater to Joshua, institutions should look to low-cost hybrid/flexible programs with management and hard skills.</td>
<td>Short course/module programs that are delivered in an online format</td>
</tr>
<tr>
<td>Norman</td>
<td>61–65-year-old age group</td>
<td>Similar to Joshua, finds career development and advancement as the driving motivation behind continuing education. He is most likely to gravitate towards short course/module programs that are delivered in an online format.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lisa</td>
<td>65+ year old age group</td>
<td>Least likely out of all personas to want to enroll in a continuing education offering/program. Short programming like single day seminars and short courses are more appealing.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: The above text is an extract from a document. For more detailed information, please refer to the original source.*
Who Are Our New Adult Learners?

New Adult Learner

Valentina (21)
Gen Z
Customer-Service Rep

Max (22)
Gen Z
Mechanics Contractor

Elise (24)
Young Millennial
Team Manager

Chen (25)
Young Millennial
Executive Assistant

Carla (28)
Mid-Millennial
Public Service Rep

Chris (31)
Mid-Millennial
Technician

Disengaged Learner
(some college, no degree)

Kaylie (23)
Gen Z/Young Millennial
Associates Degree
Full-time front-desk rep at a hotel

Mateo (19)
Gen Z/Young Millennial
Didn’t complete college
Part-time customer service rep at a retail store

Carla (28)
Mid-Millennial
Graduate Degree
Team manager in a large telecom firm

Chris (31)
Mid-Millennial
High School/GED
Between career paths, seeking employment

Shauna (42)
Millennial/Gen X’er
Bachelor’s Degree
Sales rep at a large pharma company

Phil (37)
Millennial+
Bachelor’s Degree
Government contractor

Mature Adult Learner

Madeline (52)
50 to 55 years-old
Employed full-time

Joshua (57)
56 to 60 years-old
Unemployed

Norman (63)
61 to 65 years-old
Retired in 2020

Lisa (71)
Over 65 years-old
Retired in 2012
Final Takeaways

- With the college-age population shrinking over time, it impacts online graduate degrees and other downstream credentials.

- We have to nurture what we have and a stackable portfolio leading to a degree will help soften demographic declines.

- The use of microcredentials and noncredit-to-credit pathways leading into degree programs will also be critical.

- We will need to improve our enrollment management, marketing and intake to be more focused around the new learner, as opposed to our own systems. Websites and inquiry processes are not optimal in our opinion.

- A portfolio approach, as opposed to a degree-only, approach will likely be a stronger program development strategy in the future. Orphan-programs, without stair-steps in, will have greater challenges with a pipeline of prospects.

- Institutions will have to staff and resource their efforts appropriately and strategically. This includes the use of strategic outsource partners.
A Stackable Pathway Map

The institution promotes continuity in education through offering a variety of programs and training that can lead to a certificate and ultimately a bachelor’s or master’s degree. In the following slides, UPCEA offers more potential pathways to reach the most popular occupations.
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