EAB

The Adult Learner Mindset

Understanding and Recruiters Adult Learners

Joining You Today...
Meet Your EAB Presenter

Logan Morris
Associate Director,
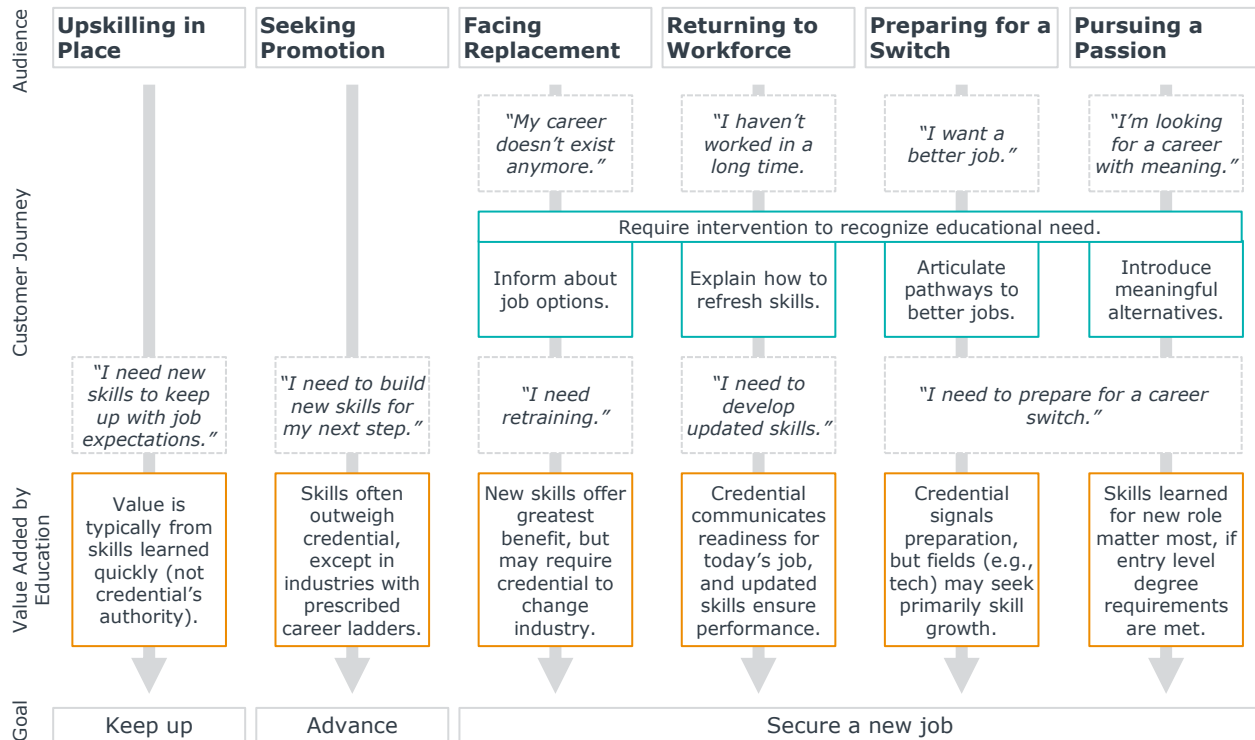*Research Advisory Services*

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Family-Oriented

Juggling Work

Self-Directed

Pragmatic

ROI-Driven

Require Flexibility

Overwhelmed

Digitally Savvy

Cost-Conscious

Focused on Time to Degree

Getting Beyond "Working Professionals"

Develop Targeted Programs Across a Prospect's Career Lifecycle

	Upskilling in Place	Seeking Promotion	Facing Replacement	Returning to Workforce	Preparing for a Switch	Pursuing a Passion
Audience						
Customer Journey			*"My career doesn't exist anymore."*	*"I haven't worked in a long time."*	*"I want a better job."*	*"I'm looking for a career with meaning."*

Customer Journey

Require intervention to recognize educational need.

			Inform about job options.	Explain how to refresh skills.	Articulate pathways to better jobs.	Introduce meaningful alternatives.
	"I need new skills to keep up with job expectations."	*"I need to build new skills for my next step."*	*"I need retraining."*	*"I need to develop updated skills."*	*"I need to prepare for a career switch."*	

Value Added by Education	Value is typically from skills learned quickly (not credential's authority).	Skills often outweigh credential, except in industries with prescribed career ladders.	New skills offer greatest benefit, but may require credential to change industry.	Credential communicates readiness for today's job, and updated skills ensure performance.	Credential signals preparation, but fields (e.g., tech) may seek primarily skill growth.	Skills learned for new role matter most, if entry level degree requirements are met.

Goal	Keep up	Advance	Secure a new job			

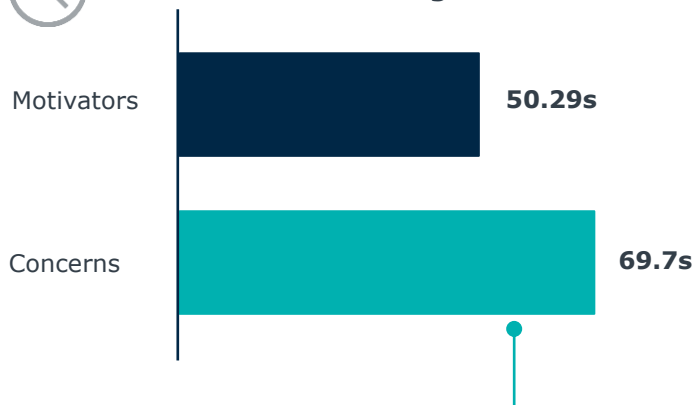## Motivated by Possibilities, But Concerned About Realities of Daily Life

Time Spent Discussing Motivations and Concerns of Returning to School

Motivators — **50.29s**

Concerns — **69.7s**

39%
Increase in time spent discussing concerns vs. opportunities

Common Questions and Concerns

A+
Will I be able to do well and pass my classes?
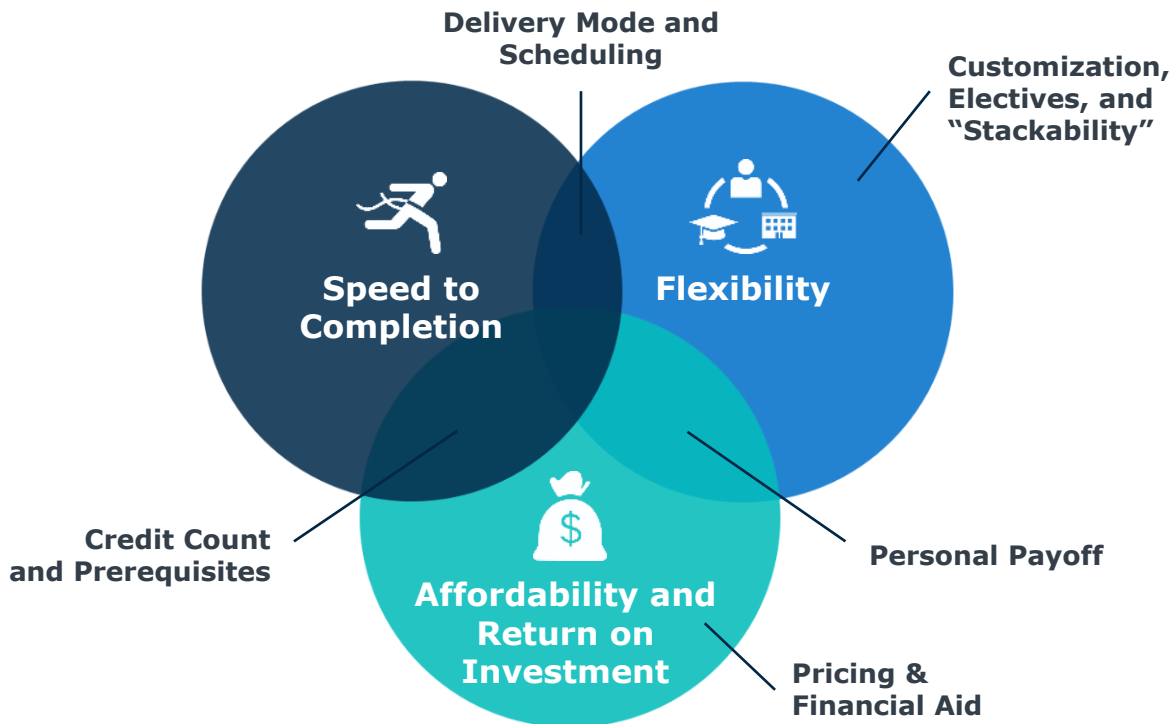
Is now the right time to complete my degree?

*Will my prior credits and experience transfer?*

Do I have the resources to complete?

The Center for Generational Kinetics

Delivery Mode and Scheduling

Customization, Electives, and "Stackability"

Speed to Completion

Flexibility

Credit Count and Prerequisites

Personal Payoff

Affordability and Return on Investment

Pricing & Financial Aid

Navigating the Complexity of Engaging Prospective Adult Learners

Engaging Prospects at Scale When Path to Enrollment Is Rarely Linear
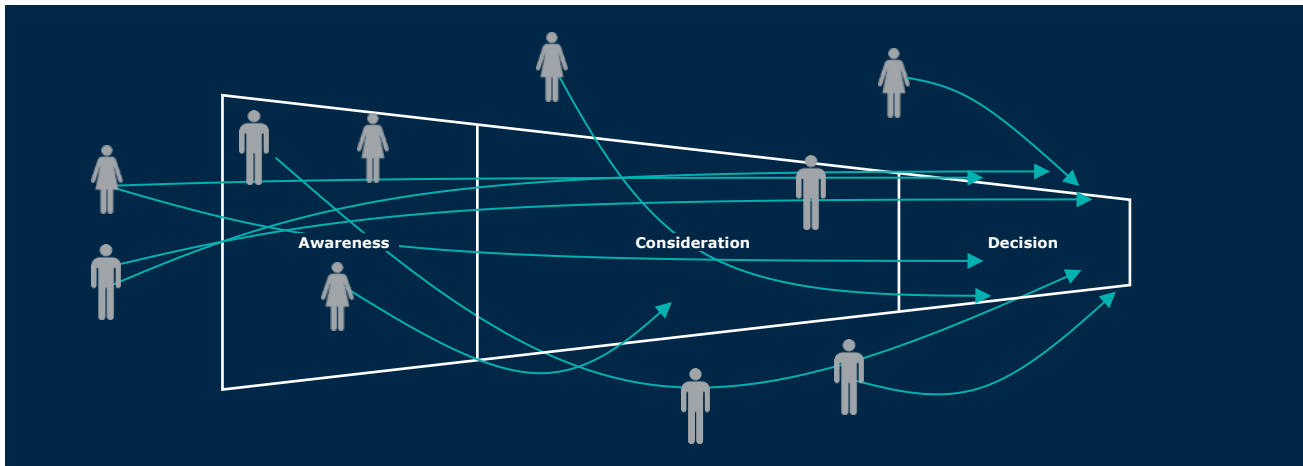
Key Questions Plague Prospects —and the Answers Determine How They Engage with Your Funnel

What options do I have?

9 out of 10
Don't know which school to attend when they initiate their journey

If I enroll, will it be worth it?

7 out of 10
Cite **outcomes-driven motivations** for earning their degree

How should I spend my time?

6 out of 10
Applying to fewer schools now than before

40.9% Applied to two or fewer schools

69.3% Said an application or admissions requirement deterred them from applying

▼

"Which application and admissions requirements (if any) influenced your decision not to apply to a specific school or program?"

Requirement	Percentage
Application fee	24.3%
GPA prerequisite	19.0%
Degree prerequisite	18.0%
Certain application requirements	17.3%
Credits prerequisite	14.4%
Essay question(s)	10.6%
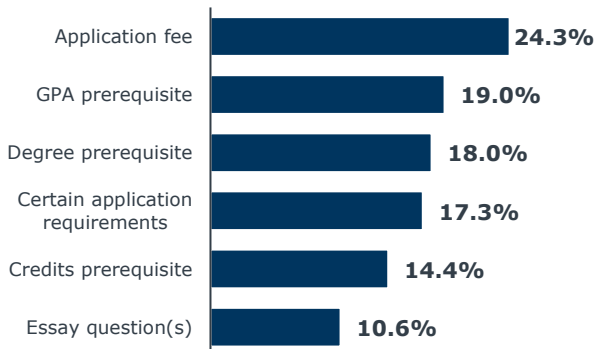
Admissions Requirements

4 Key Principles

Accuracy

Do you have enough to make a good decision in most cases?

Speed

Can you respond very quickly to most candidates?

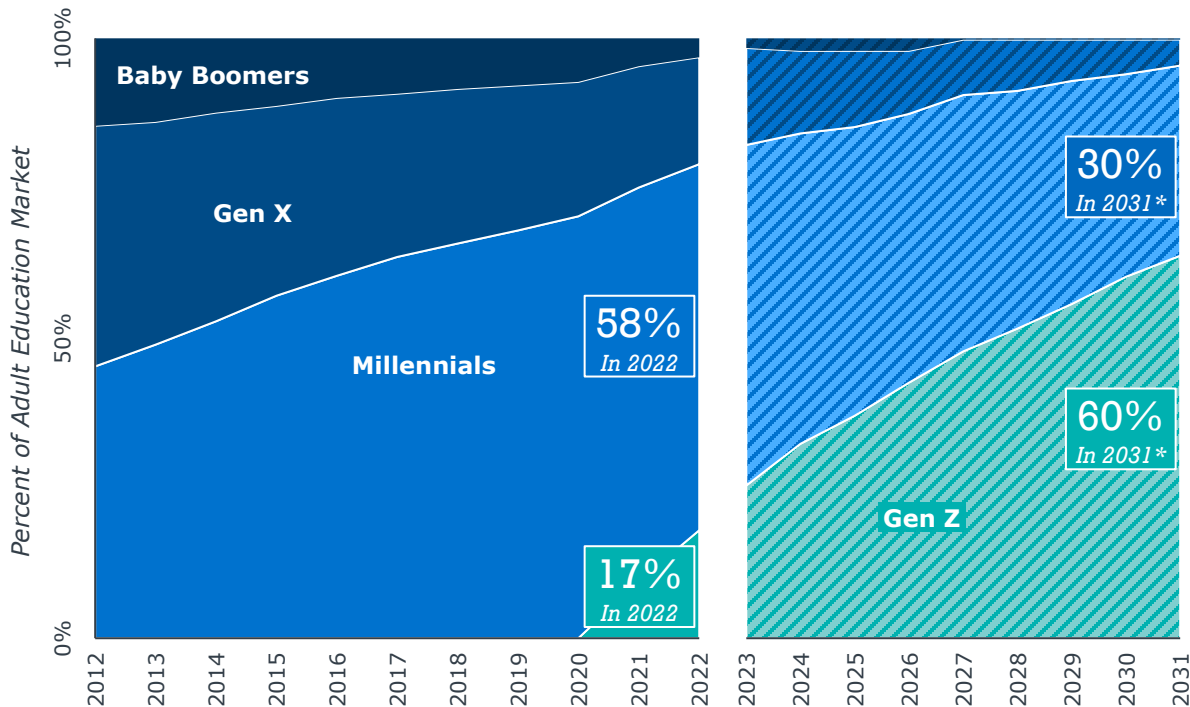### Clarity

Can you communicate your admissions criteria easily?

Access

Have you eliminated unnecessary hurdles?

1) Students Aged 26 and Older, Winter 2020 Survey

Millennials Dominate the Market Today, Gen Z Right Around the Corner

Real and projected composition of adult learners by generation, 2012-2031

Percent of Adult Education Market

Baby Boomers

Gen X

Millennials

58%
In 2022

17%
In 2022

30%
In 2031*

60%
In 2031*

Gen Z

Gen Z (12-27 Years Old Today) Have Shifting Opinions on Higher Education

	Skeptical of Authority	Financially Conscious	Risk-Averse	Digital Natives
TRAIT	Skeptical of Authority	Financially Conscious	Risk-Averse	Digital Natives
DEFINING EVENTS	Leaders fail to act on climate change	Saw parents live through Great Recession	Came of age in a pandemic	Grew up immersed in technology
	75% Have experienced mental health concerns related to climate change	**35%** Plan to start saving for retirement in their 20s	**69%** Prefer a stable job over a job they're passionate about	**4.1h** Hours spent using apps per day
IMPLICATIONS FOR HIGHER ED	**35%** Of Gen Z does not trust higher education	**64%** Worry how they will pay for higher education	**50%+** Are open to pursuing an alternative credential to reach their goals	**52%** Of students took at least one online course in 2019-2020

Source: Blue Shield of California, "Youth Climate Survey 2022," 2022; Desjardins, J., "Why Generation Z Has a Totally Different Approach to Money," We Forum, November 2018; "The Ultimate Guide to Gen Z in The Workplace," Inside Out Development, 2019; Skopec, C, "How Gen Z College Students Are Changing Higher Ed", Collegis Education, January 2021; Smalley, S., "Half of All College Students Take Online Courses," Insight Higher Ed, October 2021;Sakal, V., "Why Gen Z Isn't Interested in Your Statements, Promises, and Commitments—Yet," Morning Consult, June 2020; Kott, K., "Gen Z's Distrust in Higher Ed a 'Red Flag'," Inside Higher Ed, August 2022; "Gen Z: The Rise of Digital Natives," CUInsight, January 2022; EAB interviews and analysis.

Marketing considerations

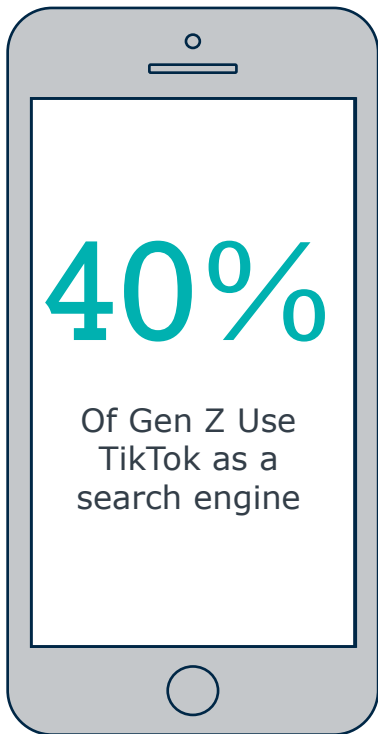| TRADITIONAL APPROACH	TODAY'S PREFERENCES	
Relationships with Brands Are Transactional Beyond standard customer support, consumers do not expect relationship with brands	**Expectation for Brands To Be Relational** Brands must publicly engage directly with consumers	**80%** Of consumers expect brands to interact with them
Highly Curated Marketing materials are meticulously created with high production value	**Minimally Curated** Perfection isn't necessary to be seen as trustworthy, helpful, and authentic	"Gen Z will call you out if you aren't being real." *-CMO, Major Clothing Brand*
Top-Down Advertisements focus on the voice of the company	**Bottom-Up** The best advertisements feature the voice of the consumer	**93%** Of consumers appreciate user-generated content
Strictly Positive Messaging Products are described as the perfect cure to the customer problem, with no side effects	**Authentic Messaging Necessitates Flaws** Consumers view presence of some challenges as more trustworthy	**86%** Of consumers say that brand authenticity is important to them

Source: Gomez, R., "8 Ways Customers Interact and Engage with Your Brand on Social," *Sprout Social*, May 2021; Tiffany, K., "The Personal Brand is Dead," *The Atlantic,* June 2022; "Gen Z Brand Relationships." *IBM*, 2017; Kunsman, T., "36 UGC Stats You Can't Ignore," *Everyone Social*, March 2022; EAB interviews and analysis.

40%

Of Gen Z Use TikTok as a search engine

This shift disrupts your...

Typical Student Journey
Social media, not website, will become the first contact with your institution

Search Engine Optimization
Google and other search engines are less relevant to search strategy for Gen Z prospects

Paid Search Efforts
ROI may decrease with lower search engine usage

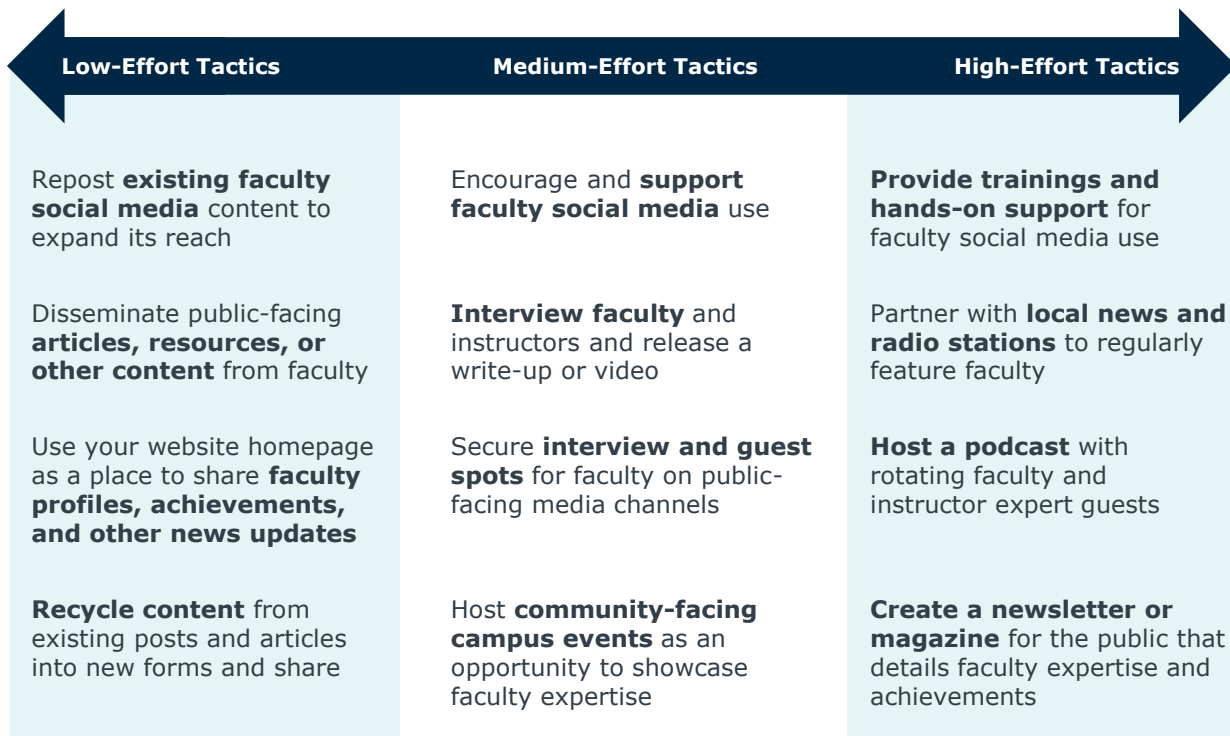**TikTok User Statistics**

63M
Gen Z and Millennial TikTok users

45.8
Minutes per day spent on app by average user

Source: Huang, K., "For Gen Z, TikTok Is the New Search Engine," *The New York Times*, September 2022; Mohsin, M., "10 TikTok Statistics that you Need to Know in 2022," *Oberlo,* July 2022; Sheikh, M.,"30 TikTok Stats Marketers Need to Know," *Sprout Social*, March 2022; EAB interviews and analysis.

Multiple Ways to Contribute Encourages Widespread Faculty Engagement

Low-Effort Tactics	Medium-Effort Tactics	High-Effort Tactics
Repost **existing faculty social media** content to expand its reach	Encourage and **support faculty social media** use	**Provide trainings and hands-on support** for faculty social media use
Disseminate public-facing **articles, resources, or other content** from faculty	**Interview faculty** and instructors and release a write-up or video	Partner with **local news and radio stations** to regularly feature faculty
Use your website homepage as a place to share **faculty profiles, achievements, and other news updates**	Secure **interview and guest spots** for faculty on public-facing media channels	**Host a podcast** with rotating faculty and instructor expert guests
Recycle content from existing posts and articles into new forms and share	Host **community-facing campus events** as an opportunity to showcase faculty expertise	**Create a newsletter or magazine** for the public that details faculty expertise and achievements

Source: EAB interviews and analysis.

Websites Significantly Impact Students' Program Choice...

#1

Your website is the **top resource** prospects use to look for information

94% Of adult learners make a point to visit websites of all schools they're considering

85% Of adult learners say a bad website negatively affects their opinion of your school

63% Of adult learners abandon your website if it's not user-friendly

... And All Have Room for Improvement

✖ Burdensome RFIs

✖ Stock photos

✖ Missing calls to action

✖ No course schedule

✖ Unclear modality and format

✖ Lack of consistentcy across pages

✖ Missing application requirements

✖ Unclear navigation

✖ Lofty, confusing language

✖ Written for wrong audience

✖ Missing program webpages

✖ Hard to find tuition info

✖ Unclear program legnth

✖ No testimonials

How Does Your Website Stack Up?

90s

Average time prospects spend on a university webpage

Website Scavenger Hunt

Is there an RFI submission?	Is there a spotlight on faculty expertise/research?	Are there program discounts or scholarships advertised?	Are the application requirements and deadline listed?
Is there contact info for a real person?	Is there information on transfer credit options?	Is the program tuition readily available?	Is program duration quickly accessible?
Is the program start date listed?	Are student outcomes shared?	Are there photos of real students?	Is there an application link or button?
Are there student or alumni testimonials?	Are program differentiators listed?	Does the page show labor market data for the field?	When viewing on a mobile device, can you read all content without the need to zoom?

The Four Missteps of Adult-Facing Websites

1 **Neglecting the Need-to-Know Information**

- Misses essential information like program cost, modality, flexibility
- Fails to address outcomes and reassure prospective students of their ROI
- Lacks differentiators from other educational options

2 **Creating an Onerous User Experience**

- Available information is hard to find or restricted behind RFI
- Calculating cost or applying requires students to hunt
- Similar programs aren't presented cohesively, raising questions about options

3 **Failing to Address Your Audience**

- Overly academic and institutional language doesn't speak to a prospective adult learner
- Visuals don't represent actual students (and/or are underleveraged)

4 **Lacking a Cohesive, Intentional Brand**

- Different program types feel different and disconnected
- Offerings appear unrelated to larger institutional branding

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Final Considerations

Prospects Demand Responsiveness and Accessibility from Institutions

What Students Valued The Most Important From University Comms

Contacts and Communications with a Mean Score of 3 or Higher	Mean
School's responsiveness to my inquiries	4.05
Resources available on the school's website	3.99
Email communications from the school	3.71
Individual communication with faculty in my program of interest	3.66
Online resources (e.g., search engines, banners, and directories)	3.53
Recommendations from professionals working in intended area of study	3.44
Communications with financial aid representatives	3.40
Information session	3.13
Mobile-enabled communications from the school	3.08

School responsiveness, web & email comm

Helpful information from the school

Mean scores are based on a 5-point scale, where 5 = extremely important and 1 = not at all important.

The Type of Student Reaction You Want to Avoid

> We were told we would hear back about the status of our applications within 10 business days. When we did not hear I reached out and was told I would have to wait for longer.
>
> **It was at least a month before I got a response, and by that time I reached out to say I was no longer interested in attending their school.**
>
> This was due to the fact that I was accepted elsewhere, felt good about that offer, and felt disrespected by the other school. **I did not think this was a good reflection of how they treat students.**
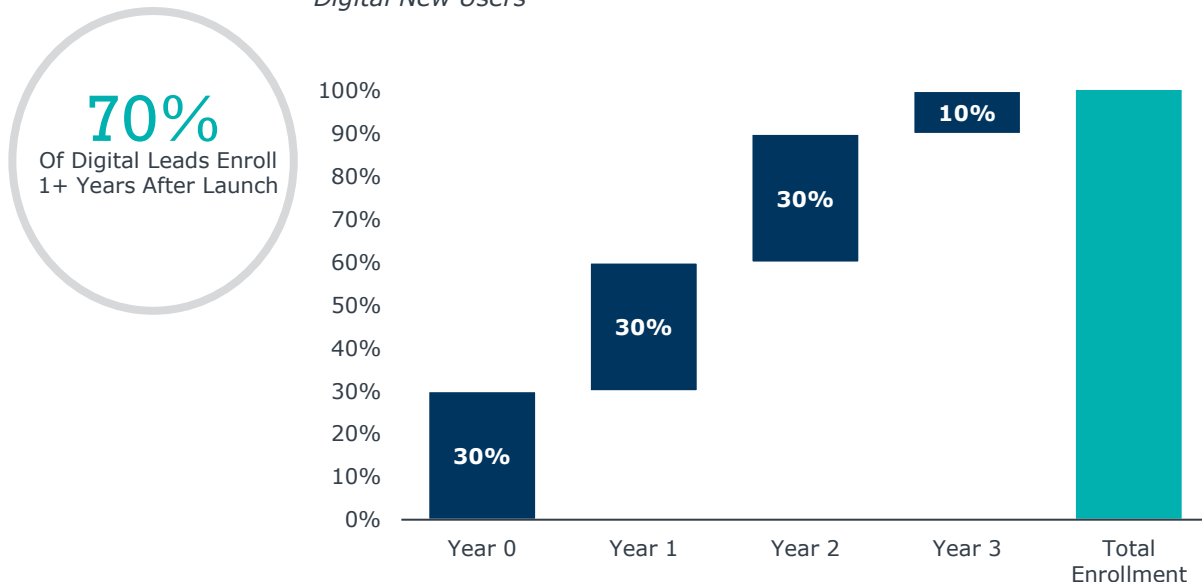
Survey Participant

Be Ready To Stay In Touch With Prospects For Up To Three Years

70%
Of Digital Leads Enroll
1+ Years After Launch

Percent of Total Enrollment By Year Since Campaign Launch
Digital New Users

1

Partnerships
- Employers
- Other institutions or orgs

2

Value Proposition
- Promotes affordability, flexibility, speed to completion and return on investment

3

Marketing and Recruitment
- Diversified approach
- Budget

4

Prospect Experience
- Seamless inquiry and application experience with digital-first approach

5

Program Portfolio
- Builds desired skills
- Meets labor demands

6

Online Expertise
- Online courses
- Online student support

Next Steps

Do our programs and processes effectively support adult learners?

What steps can we take to improve their experience?

Adult Degree Completers

Program Characteristics Most Important to Degree Completers

n=1,010 U.S. degree completion prospects[1] ages 25-54

Flexible and Customized

Degree completers seek flexible, customizable degree programs designed with their schedule and lifestyle in mind.

61% Seek a customized plan or roadmap to help them complete their degree

Online

Two-thirds of respondents intend to enroll in a program that allows them to complete some or all courses online.

91% Will likely take courses that are offered online

Enrolls Students Like Them

Degree completers want evidence that programs and institutions cater to students like them.
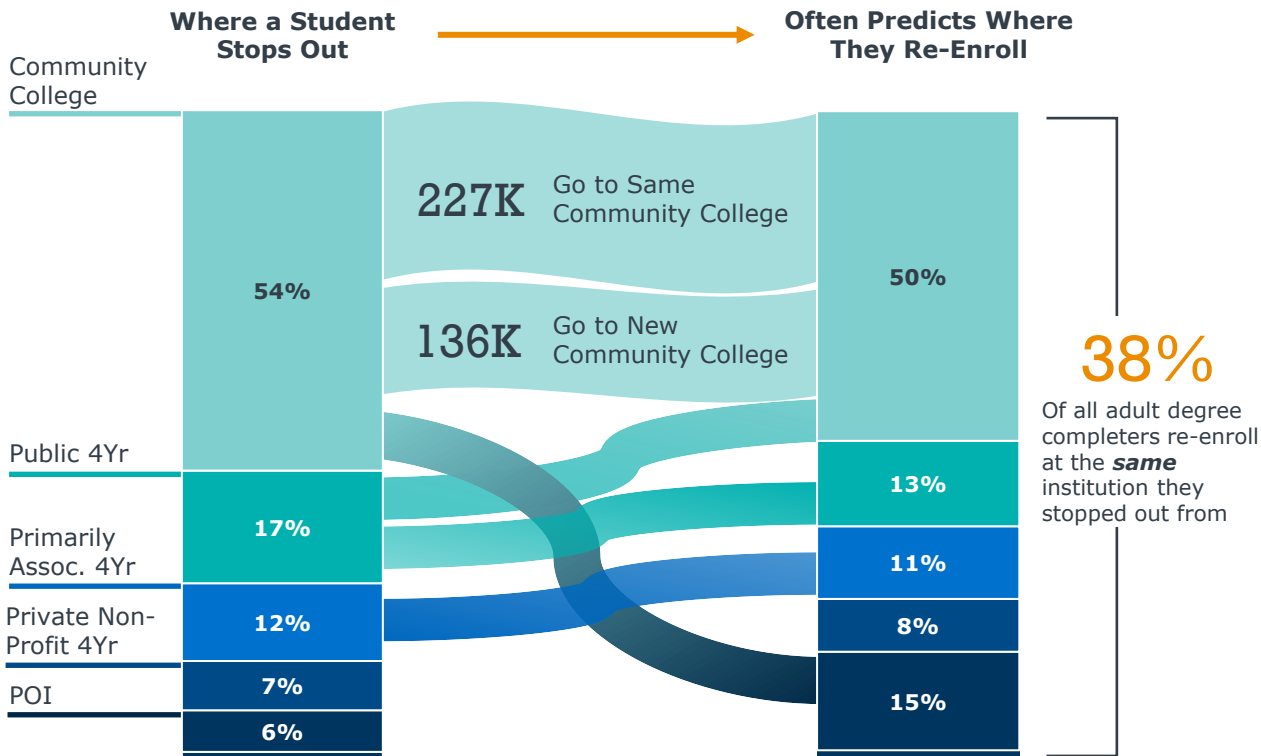
67% Seek a program designed "for someone in my situation"

1) Survey of American adults without a prior bachelor's degree but interest in pursuing one; may include adults with associate's degrees and/or certificates.

Source: The Center for Generational Kinetics.

Institutions attended by 744K degree completion students before and after re-enrollment in AY22

**Where a Student
Stops Out**

**Often Predicts Where
They Re-Enroll**

Community
College

Public 4Yr

Primarily
Assoc. 4Yr

Private Non-
Profit 4Yr

POI

54%

17%

12%

7%

6%

227K Go to Same
Community College

136K Go to New
Community College

50%

13%

11%

8%

15%

38%

Of all adult degree
completers re-enroll
at the ***same***
institution they
stopped out from

"Some College, No Credential," National Student Clearinghouse
Research Center, 2023; EAB interviews and analysis.

Unfulfilled Ambitions Constrain Transfer Market

A Large, but Shrinking Market of Potential Transfer Students

4.5M Community college students in US, 2022

860K Fewer students in 2022 than 2019

## But Most Students Never Realize Their 4-Year Transfer Goals

78% of community college students plan to complete bachelor's degree in five years

31% successfully transfer within six years

Most Successful Transfers Enroll at Less Selective Public Institutions

Institution choices of two-year transfers to four-year institutions, 2015-2021[1]

6%
4-Year Private, For-Profit

19%
4-Year Private, Non-Profit

75%
4-Year Public
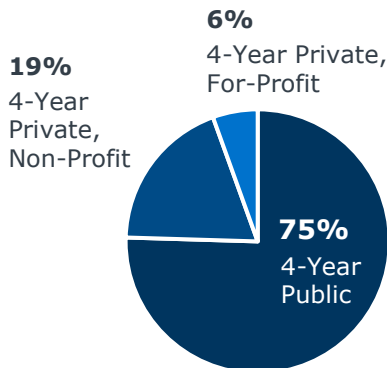
75% of four-year transfers from two-year institutions enroll at low or moderately selective institutions

1) Most recently available data.
2) *Primarily associate's degree granting bachelor's institutions

Understanding the 2-Year Transfer Market

Low Transfer Rates and Credit Loss Hamper Institutional and Student Goals

Common Barriers to Transfer

✖ **No Predictable Pathway**
Students **lack clear benchmarks** for successful transfer

✖ **Insufficient Advising**
Students **'waste' credits** or **fail to complete necessary paperwork**

✖ **Curricular Misalignment**
Articulation agreements fail to align 2-year and 4-year learning outcomes, **leaving students unprepared**
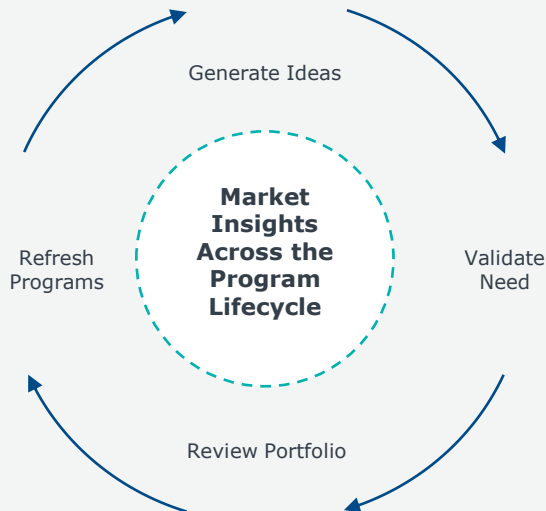
Credit Loss Hampers Affordability, Time to Degree

22% of credit is 'lost,' on average, when students transfer between public two-year and four-year colleges

Market Insights Reports

Custom Analysis and Consultation to Validate Program and Portfolio Growth Strategy

Market Insights Across the Program Lifecycle

- Generate Ideas
- Validate Need
- Review Portfolio
- Refresh Programs

Lightcast

We partner with industry-leader Emsi Burning Glass for **real-time labor market intelligence**, to complement our analysis of:

- Enrollment and conferral trends
- Competitor program positioning
- Prospect-facing website and inquiry process audits
- BLS projections and Census data
- Peer program curricula
- Industry trends and literature

1K+ Market analyses completed annually

3 Projects requested by most partners annually

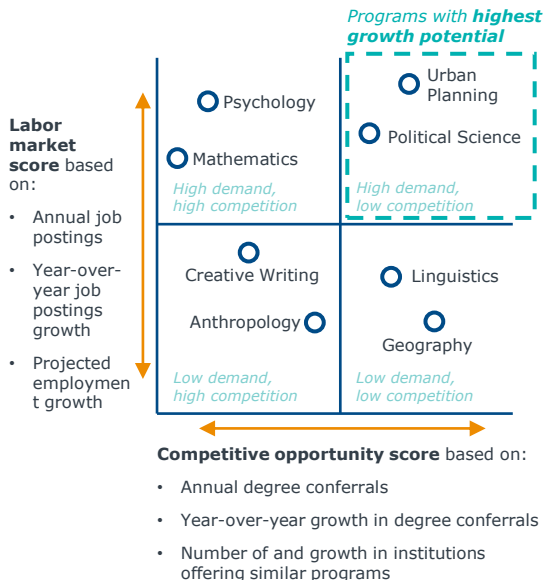**12+** Requests completed annually for our busiest partners

Portfolio Health Check
maps existing programs according to market demand for graduates and competition from other institutions to identify program growth potential

Example

*Programs with **highest growth potential***

Labor market score based on:

- Annual job postings
- Year-over-year job postings growth
- Projected employment growth

○ Psychology

○ Urban Planning

○ Mathematics

○ Political Science

High demand, high competition

High demand, low competition

○ Creative Writing

○ Linguistics

Anthropology ○

○ Geography

Low demand, high competition

Low demand, low competition

Competitive opportunity score based on:

- Annual degree conferrals
- Year-over-year growth in degree conferrals
- Number of and growth in institutions offering similar programs

Market Opportunity Scan
analyzes regional labor market and degree conferral trends to determine viable new program opportunities. This analysis also considers potential efficiencies with your existing programs.

Example

Step 1
Identify regional high-demand occupations
→ 3,326 jobs for "medical and health services managers" each quarter

Step 2
Map occupations to academic fields
→ Medical and health services managers → Health administration

Step 3
Analyze competitive landscape by field
→ Health administration degree conferrals grow 13% per year

Step 4
Identify and rank new program opportunities ⬇

High-Potential Program Opportunities

Rank	Opportunity	Demand Score	Competition Score	Factors to Consider
1	Physical therapy	4.2	4.2	Expensive to launch
2	Health administration	3.9	3.2	Aligns with nursing portfolio
3	Data analytics	4.3	2.3	Aligns with computer science programs

Program Feasibility Study
assesses employer and student demand for a new program. In addition to analyzing labor market data, we interview similar programs' directors about enrollment trends and demographics

Example

Differentiate a new financial crimes management program by including data analysis coursework

Employers commonly seek financial crimes management professionals with data analysis skills like R and SAS, but not all existing programs teach these skills

Commonly sought financial crimes management skills
n=6,100 job postings; source: Emsi Analyst™

Skill	Value
Fraud prevention and detection	listed in 2,492 job postings
Risk management	2,148
Accounting	1,691
Auditing	1,658
Trade compliance	1,609
SQL	990
Economics	975
Strategic…	940
SAS	817
Project…	790
R	621

360 Program Assessment
identifies opportunities to update the curriculum and positioning of an existing program by analyzing employer demand in that field and auditing the program's website and inquiry process

Example

360 program assessment components

- Analysis of employer demand
- Analysis of conferral trends
- Audit of inquiry experience
- Audit of website experience

Email correspondence
- Answered questions promptly
- Did not send resources in follow-up to a phone call

Encourage proactive inquiry response
Don't wait for prospects to ask for phone calls or program resources

Phone conversation
- Walked through program application process
- Did not ask prospective student about career goals or background

Discuss program in the context of student goals
Ask prospects what they're working toward and frame the program in those terms