Balancing Life, Work, and School: New Data from The 2019 Adult Prospect Survey™

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Today’s Agenda

Essential Questions:

• What are prospective adult learners looking for when they decide to continue or complete their education?
• How can the schools or programs better understand and anticipate what these learners are looking for?

Key Topics:

1. Introduction: Eduventures’ Adult Prospect Survey (APS), 2010 – Present
2. Adult Learner Demand for Postsecondary Credentials
3. Adult Learner Decision-Making
4. Implications for Schools
5. Questions / Answers
6. Concluding Remarks
Introduction: Eduventures’ Adult Prospect Survey (APS), 2010 – Present
Our Why, How and What

WHY WE EXIST, HOW WE ACHIEVE OUR VISION AND THE SERVICES WE PROVIDE

ACT | NRCCUA:
A membership organization supporting better outcomes for students and institutions.

myOptions:
Provides free post-secondary planning services to students, parents and high school professionals.

Encoura:
Our approach to helping members make smarter, data-driven decisions.

Encoura Data Lab:
Our enrollment platform, exclusive to NRCCUA members, that combines data science & analytics, predictive modeling, omnichannel enrollment services and Eduventures research & advisory services

Eduventures Research:
Eduventures Research provides primary research, analysis, and advisory services to support decision-making throughout the student life cycle. One of many modules to come.
Eduventures’ Adult Prospect Survey – APS 2019

Extension of ongoing research since 2010 into prospective adult learners

Qualifiers:
• 22 and older
• Have expressed interest in continuing or completing their education within next 36 months
• 4000+ nationally representative sample

2019 Report Series:
1. Assessing Demand
2. Prospective Adult Learner Mindsets*
3. Marketing to Prospective Adult Learners

*Derived from latent class analysis; Distinct from persona marketing research
Demographics

- **Age Distribution**:
  - 25 – 34 years old, 32%
  - 35 – 44 years old, 20%
  - 45 – 54 years old, 16%
  - 55 – 64 years old, 11%
  - 65 years or older, 4%

- **Gender Distribution**:
  - Male, 43%
  - Female, 56%

- Undergrad:
  - 46% Male, 53% Female

- Graduate:
  - 45% Male, 55% Female

n = 4020, unweighted
Demographics

Appropriate Geographical Representation Based on U.S. Population

Race / Ethnicity

- White, 78%
- Asian, 8%
- Black, 7%
- Hispanic or Latino, 9%
- Native Hawaiian or Pacific Islander, 0%
- American Indian or Alaskan Native, 2%
- Prefer not to answer, 1%
- Other, please specify, 1%

n = 4013, unweighted
Demographics

Marital Status

- Married, 48%
- Single, never married, 34%
- Divorced/separated, 7%
- Living with partner, 9%
- Widowed, 2%
- I prefer not to answer, 0%

Employment Status

- Full-time employed, 70% (Graduate, 77%)
- Homemaker, 15% (Bachelor’s, 13%)
- Part-time employed, 11% (Associate’s and Under, 11%)
- Unemployed, looking for work, 5% (Associate’s and Under, 5%)
- Retired, 8% (Associate’s and Under, 5%)
- Unemployed, not looking for work, 4% (Associate’s and Under, 1%)
- Caregiver (e.g., children, elderly), 3% (Associate’s and Under, 1%)
- Other, 2% (Associate’s and Under, 1%)

n = 4013, unweighted
Demographics

Did either of your parents earn a college certificate or degree?

- No, neither, 46%
- Yes, both parents, 24%
- Yes, one parent, 27%
- Prefer not to answer, 1%
- Not sure, 3%

Time Elapsed Since Last in College 2019

- 10 or more years, 42%
- Less than 6 months, 3%
- 6 months to 11 months, 3%
- 1 year, 6%
- 2 years, 10%
- 3-4 years, 13%
- 5-9 years, 22%

n = 4013, unweighted
What is the Scope of Adult Learner Demand for Postsecondary Credentials?
Adult Learners: Committed, Hesitant or Skeptical?

Key Factors Impacting Breadth and Depth of Demand

- Expansion of alternatives to conventional higher education
- Higher education’s reputational malaise
- Historically low unemployment (higher underemployment)
  - 71% full or part time employed
- Imprint of the Great Recession
  - 42% last enrollment more than 10 years ago
Adult Learners: **Committed, Hesitant or Skeptical?**

APS 2019 distinguishes a number of levels of self-declared adult demand

**17% Committed Adult Prospects:** Will definitely or probably enroll

**26% Hesitant Adult Prospects:** Extremely or very interested if time/money were no object

**25% Skeptical Adult Prospects:** Somewhat or slightly interested if time/money were no object
Adult Interest

Age Remains Key Factor, but Becomes Less Important “If Time and Money Were No Object”

Levels of Interest by Age

- **22 - 24 years old**: 30% Committed, 28% Hesitant, 21% Skeptical, 5% No Thanks
- **25 – 34 years old**: 24% Committed, 30% Hesitant, 21% Skeptical, 2% No Thanks
- **35 – 44 years old**: 17% Committed, 29% Hesitant, 24% Skeptical, 11% No Thanks
- **45 – 54 years old**: 10% Committed, 26% Hesitant, 29% Skeptical, 2% No Thanks
- **55 – 64 years old**: 5% Committed, 22% Hesitant, 33% Skeptical, 37% No Thanks
- **65 years or older**: 2% Committed, 11% Hesitant, 37% Skeptical, 55% No Thanks

Hesitancy and skepticism may fade as time/cost concerns are addressed.

Source: Eduventures analysis and modelling of APS 2019 data.
Irony of Postsecondary Demand

Dream of a Credential Remains Remote Among Those with Greatest Need

Adult Interest in Postsecondary Education by Prior Educational Attainment

<table>
<thead>
<tr>
<th>Educational Attainment</th>
<th>Committed</th>
<th>Hesitant</th>
<th>Skeptical</th>
<th>No Thanks</th>
</tr>
</thead>
<tbody>
<tr>
<td>H.S. Diploma / Below *</td>
<td>4%</td>
<td>8%</td>
<td>8%</td>
<td>80%</td>
</tr>
<tr>
<td>* = enrolled did not graduate or never enrolled</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doctoral/Prof</td>
<td>11%</td>
<td>37%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>AVERAGE</td>
<td>17%</td>
<td>26%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Master’s</td>
<td>16%</td>
<td>28%</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>Some College/Undergrad Cert</td>
<td>19%</td>
<td>28%</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td>Associate</td>
<td>21%</td>
<td>28%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Bachelor’s/Grad Cert</td>
<td>22%</td>
<td>31%</td>
<td>29%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: Eduventures analysis and modelling of APS 2019 data.

*TMNO means “time/money no object”.
Prospects with Sub-Baccalaureate Experience

Stronger Intent to Pursue Degrees; Weaker Intent Towards Alternatives

Sub-Baccalaureate Prospects by Quality of Interest and Planned Postsecondary Pathway

Source: Eduventures analysis and modelling of APS 2019 data.
*TMNO means “time/money no object”.
Prospects with Undergrad Experience

Interest in Master’s Remains Supreme; Interest in Sub-Degree Credential Correlated with Lower Enrollment Enthusiasm

Source: Eduventures analysis and modelling of APS 2019 data.
*TMNO means “time/money no object”.

Bachelor’s-Holder Prospects by Quality of Interest and Planned Postsecondary Pathway
Prospects with Graduate Experience

Degrees Reign, but Large Minorities Express Greater Interest in Alternatives; Lower Enrollment Enthusiasm Easier to Overcome

Graduate Degree-Holder Prospects by Quality of Interest and Planned Postsecondary Pathway

Source: Eduventures analysis and modelling of APS 2019 data.
*TMNO means “time/money no object”.
What Drives Adult Learner Decision Making?
Across interest level, demographics, and employment status, the decision to return to school is a calculation of disruption, risk and reward.

Key Factors:
• Prior educational attainment and experience
• Current vs. desired employability
• Distance (time/space) from economic instability
School / Program Choice

School / Program Most Likely to Enroll In

- Shallow enrollment interest favoring low-threshold of entry, except for “don’t know”
- Lagging interest in alt. credential providers
Attainment Impacting Pathway Goal

Educational Attainment & Desired Pathway Goal (Long-Term)

- Grad. Certificate/Degree, incl Phd, MBA, ED
- Bachelor’s degree
- Undergraduate certificate
- Associate degree
- Never Enrolled; Enrolled but did not graduate

- Phd, Prof Degree, Master’s (incl MBA)
- Graduate certificate
- Bachelor’s degree (4-year degree)
- Associate degree (2-year degree)
- Vocational Training; Undergrad Certificate
- Courses; Non-Credit Certificates
- Don’t know
The Relationship Between Ed. Attainment and Pathway Goals

Among Committed, Hesitant, and Skeptical prospects, prior educational success (conferral and degree attainment) often translates into confidence, capital, and capacity for further degree attainment.

Less experience and attainment may direct prospects away from time/capital-intensive degrees or programs and towards transactional, shorter-form, skill-intensive experiences.

*A threat to long-term upward degree / program mobility?*
What Should Schools (and Others) Do to Meet these Challenges?
Why Bother? Top Goals For Adult Prospects

Low Interest in Long-Range Planning Among Prospects Seeking Lower Threshold of Entry

Graduate Degree-Holder Prospects by Quality of Interest and Planned Postsecondary Pathway
Top Desired Program Features by Prior Credential

Frequency of Top Feature Selection vs. Mean

Heightened Desire for Services, Quality Metrics, and Flexibility Among More Credentialed Prospects; Lower Threshold of Entry Sought by Their Less Credentialed Peers
Goals, Expectations and Features – Meeting the Needs of Prospective Adult Learners

What matters among “committed”, credential-heavy prospects?
• Evidence & career outcomes (ROI), but also engagement and enrichment
• Process and experience continue to motivate credentialed prospects
• Credential attainment = a bundled insurance policy?

What matters among “hesitant & skeptical”, credential-light prospects?
• Shorter horizons, building blocks, a lower threshold of entry
• Transfer polices + credit for prior experience + support services win the day
• Less of an insurance policy and more of a safety net
Concluding Remarks
Life Stage & The Prospective Adult Learner Mindset

Prior educational experiences, credential attainment and demographics remain the key drivers of postsecondary demand.

Prospects express persistent faith in conventional ed providers, but want them to act like the alternative.

• Flexible; minimized disruption; maximized outcomes

The neutrality of modality: need for engagement, community and network continues to be balanced against convenience, autonomy, and control.
What’s Next from Eduventures’ Adult Prospect Survey?

Forthcoming Reports
• Adult Learner Demand
• Adult Learner Mindset Segmentation
• Patterns and Use and Trust Among Adult Prospects; Implications for Marketing and Communications

WCET – Denver
CAEL – Chicago
Eduventures Summit, 2020
Thank you.

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Thank you.