

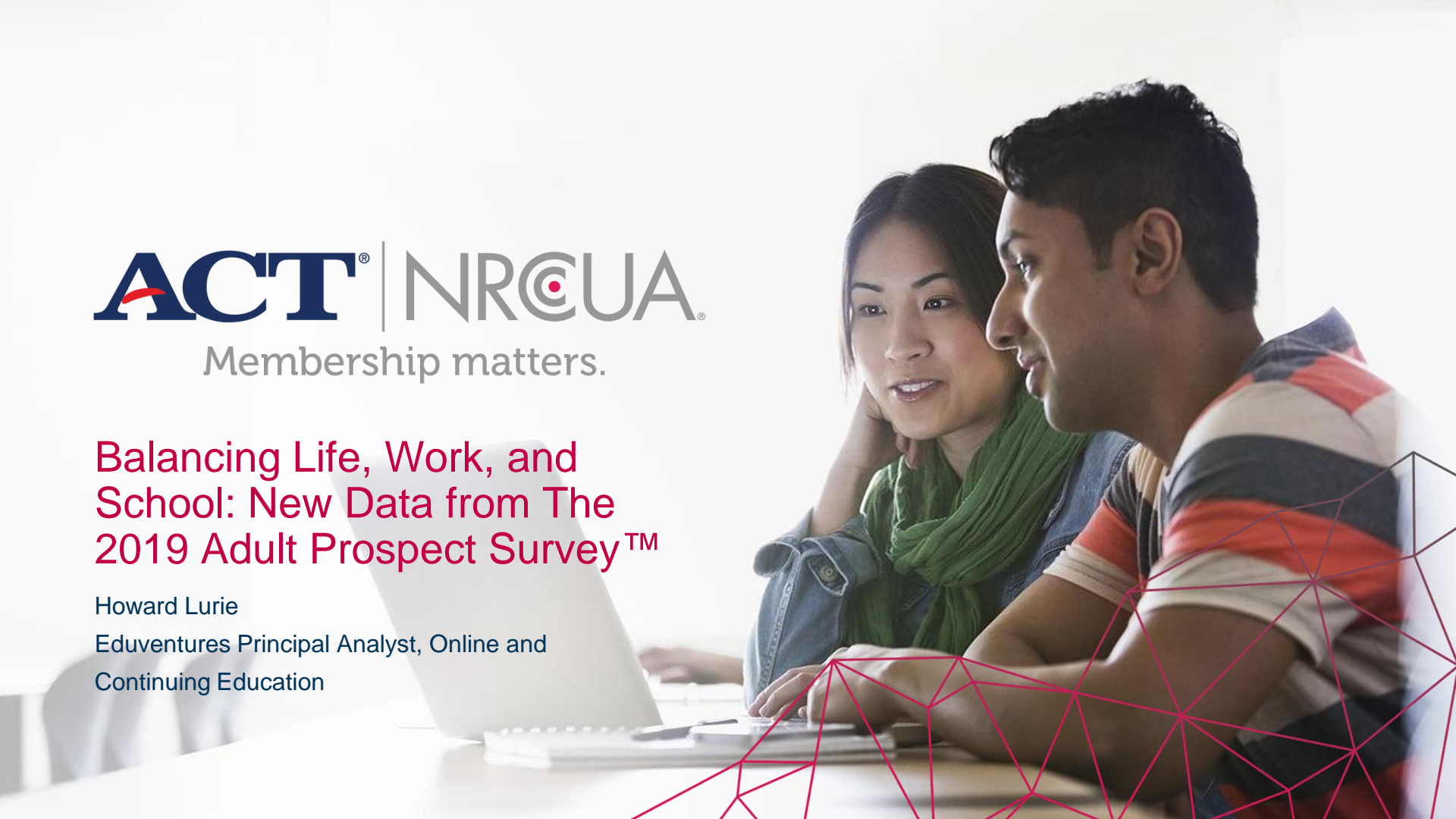


Membership matters.

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:

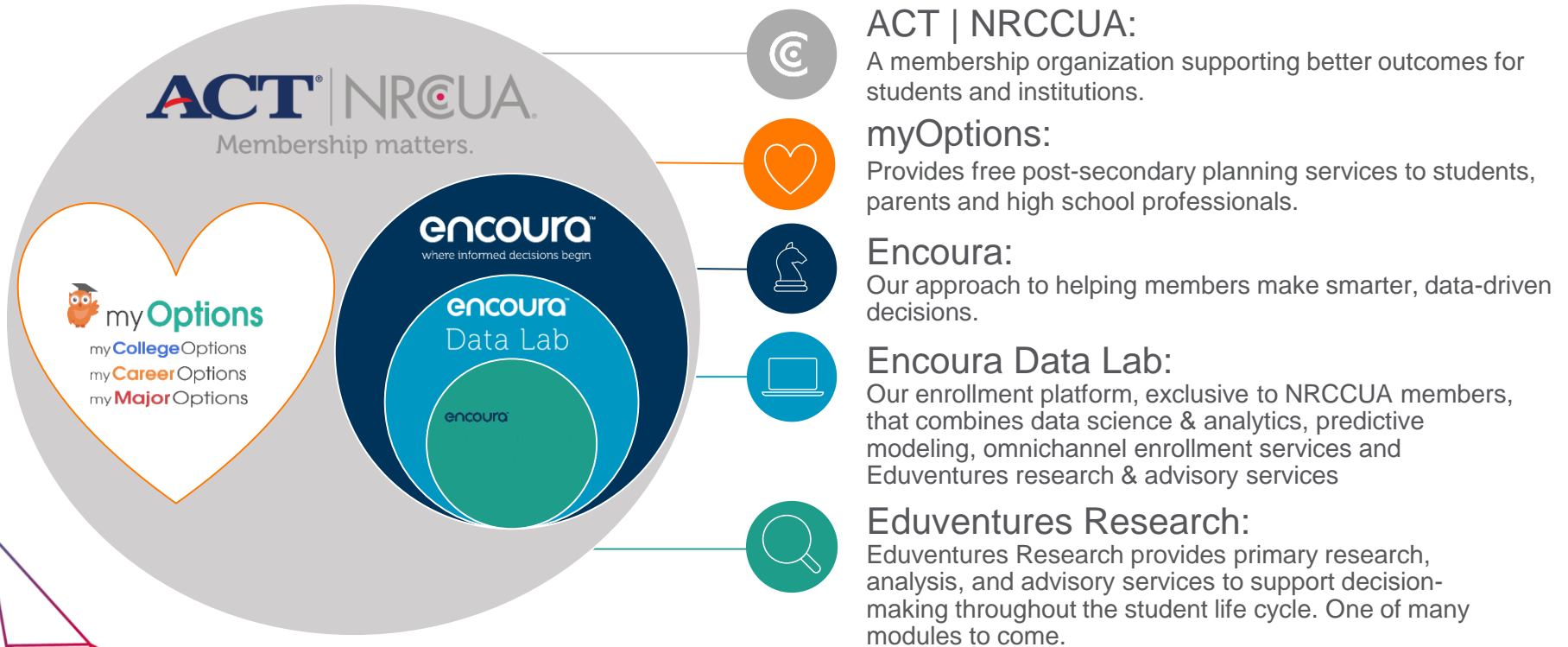
1. Introduction: Eduventures' Adult Prospect Survey (APS), 2010 – Present
2. Adult Learner Demand for Postsecondary Credentials
3. Adult Learner Decision-Making
4. Implications for Schools
5. Questions / Answers
6. Concluding Remarks



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



Eduventures' Adult Prospect Survey – APS 2019

Extension of ongoing research since 2010 into prospective adult learners

Qualifiers:

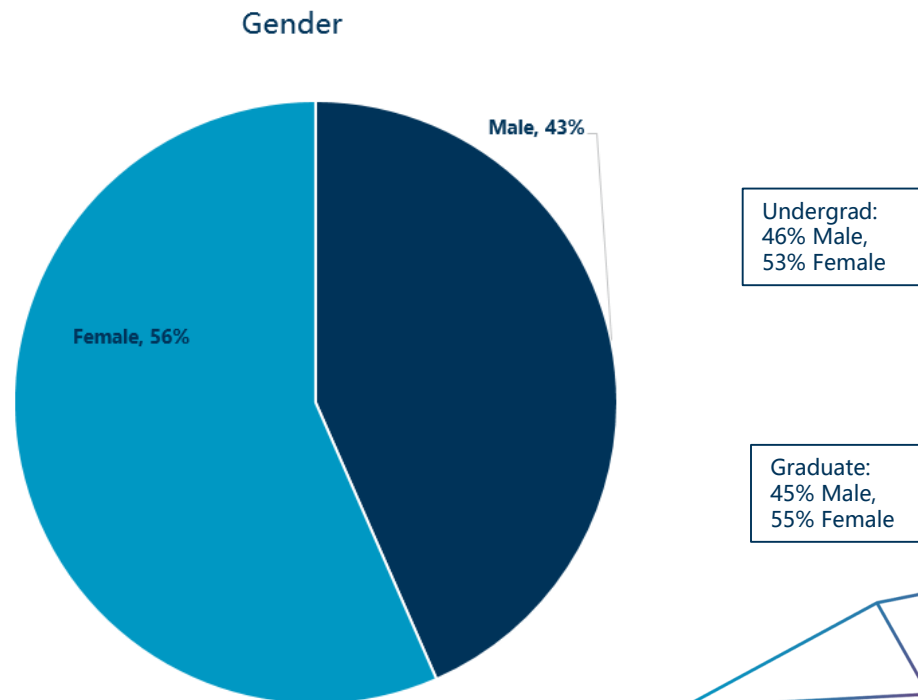
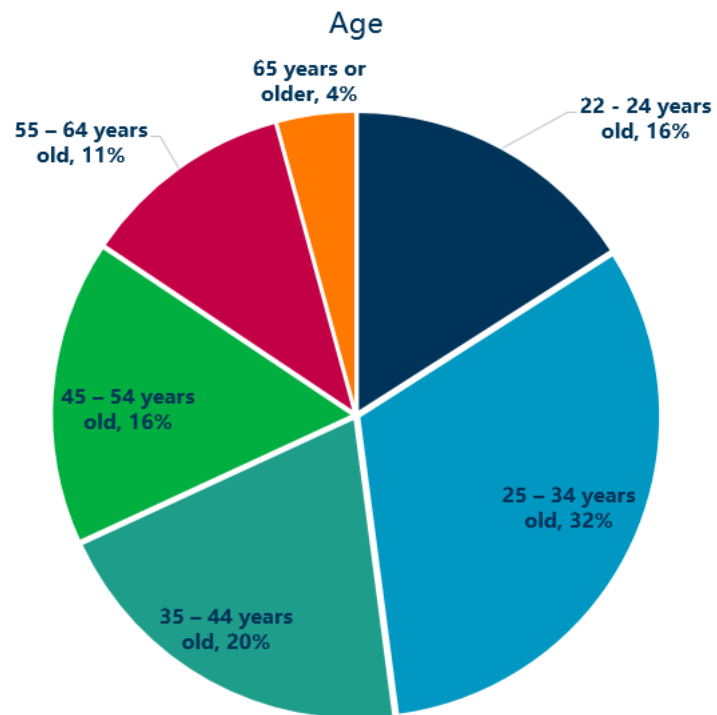
- 22 and older
- Have expressed interest in continuing or completing their education within next 36 months
- 4000+ nationally representative sample

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

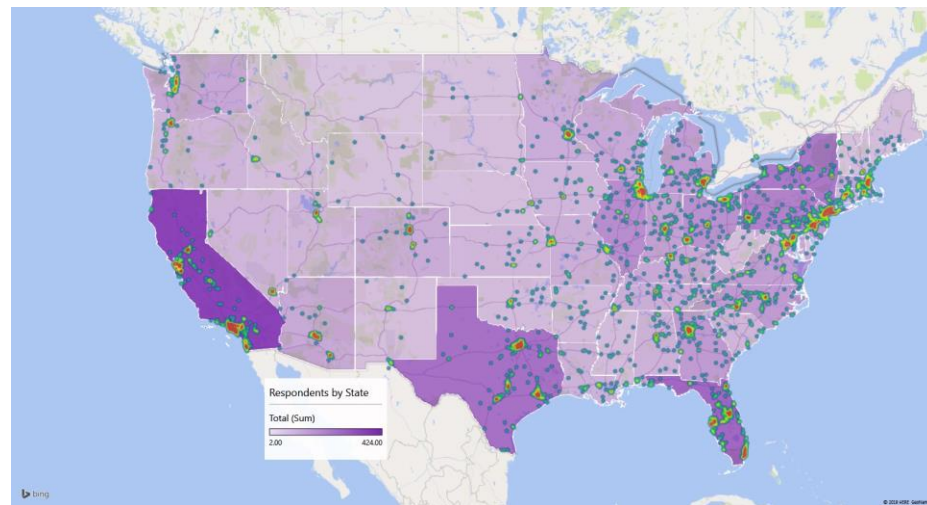
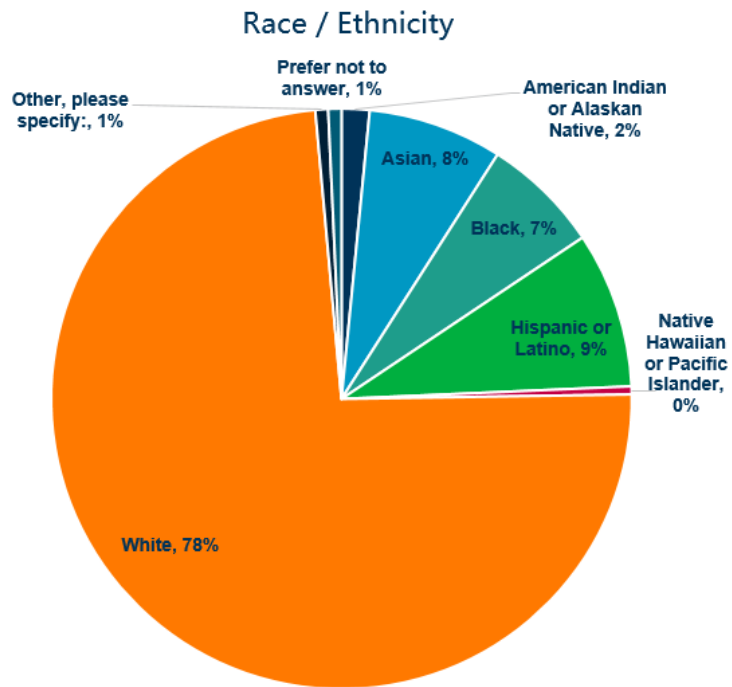


n = 4020, unweighted



Demographics

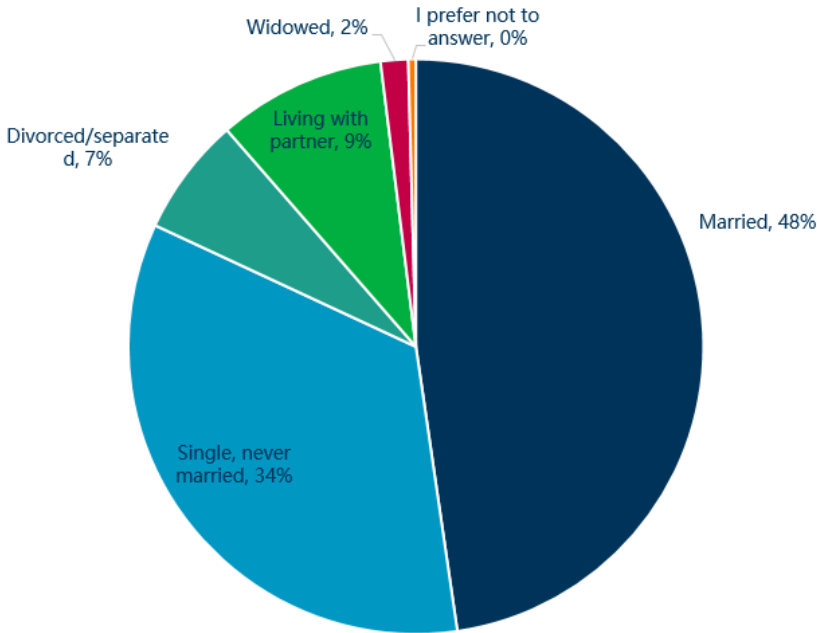
Appropriate Geographical Representation Based on U.S. Population



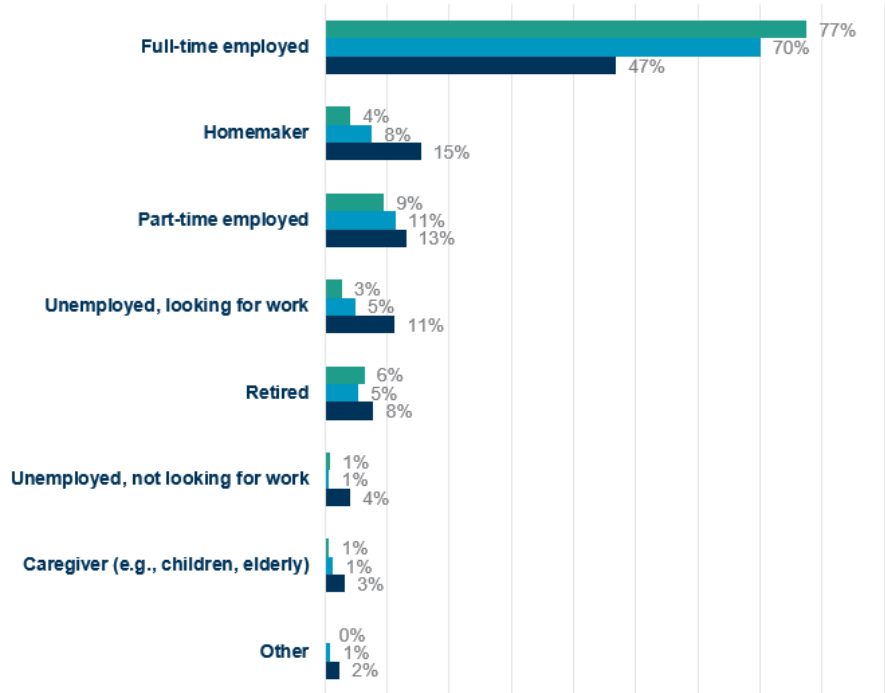
n = 4013, unweighted

Demographics

Marital Status



Employment Status

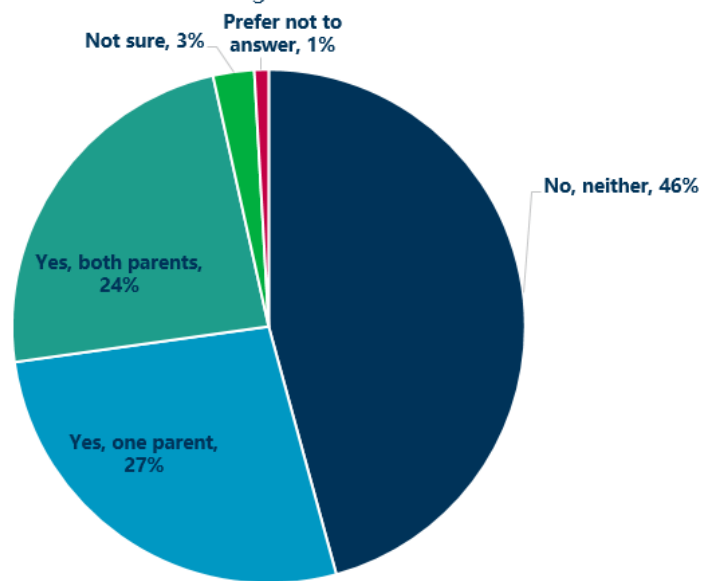


n = 4013, unweighted

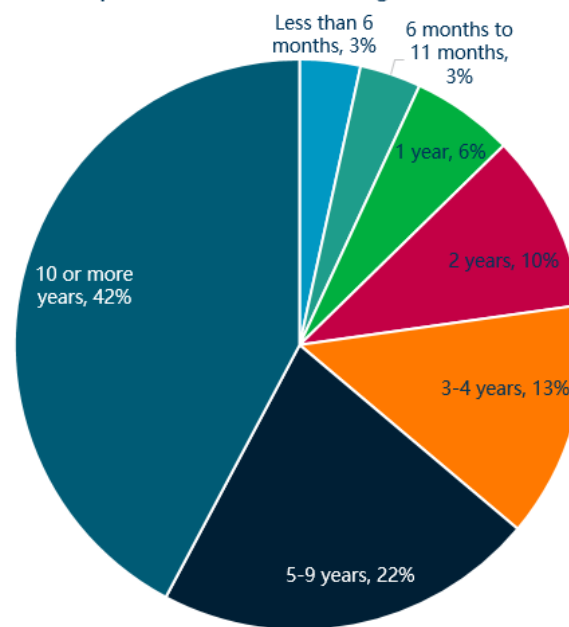
■ Graduate ■ Bachelor's ■ Associate's and Under

Demographics

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



Time Elapsed Since Last in College 2019



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*

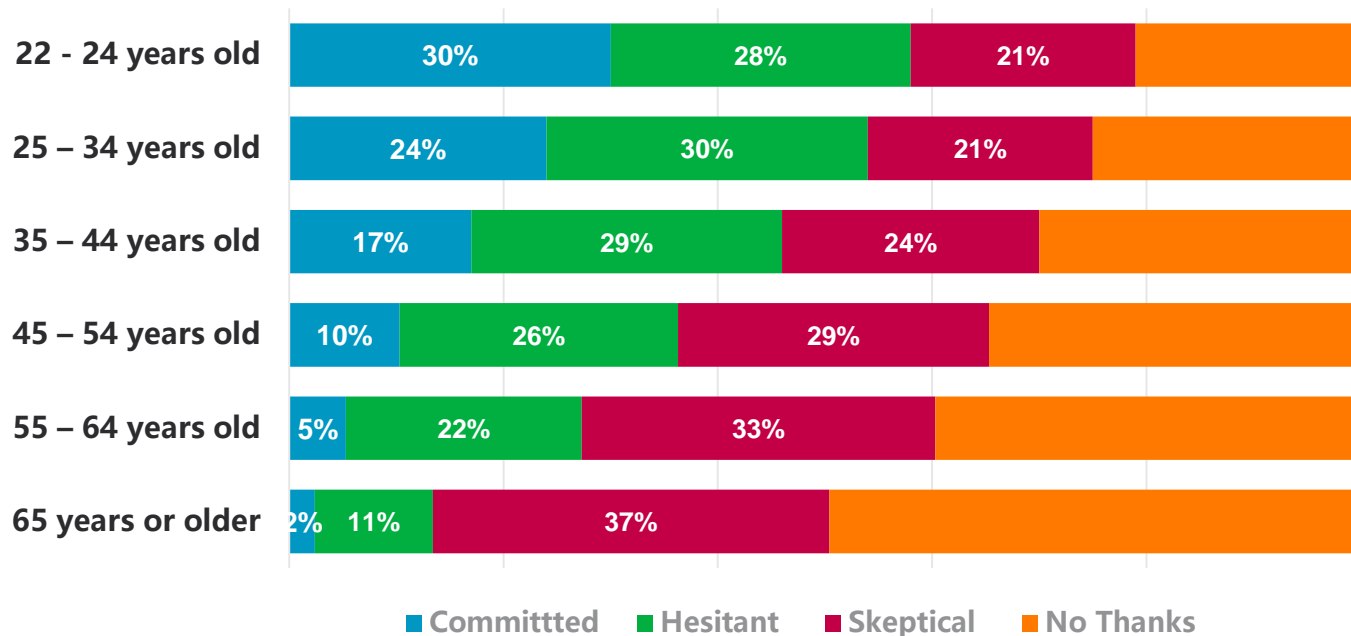
26% Hesitant Adult Prospects: *Extremely or very Interested if time/money were no object*

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



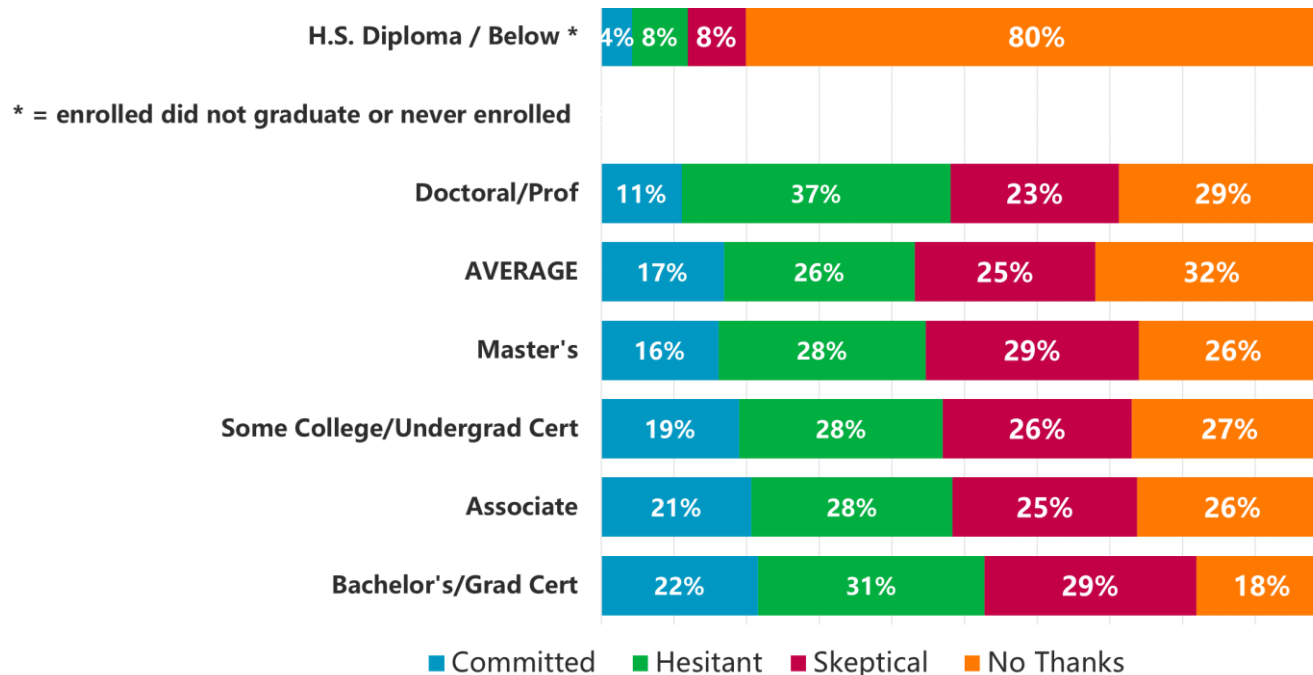
Hesitancy and skepticism may fade as time/cost concerns are addressed.

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



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



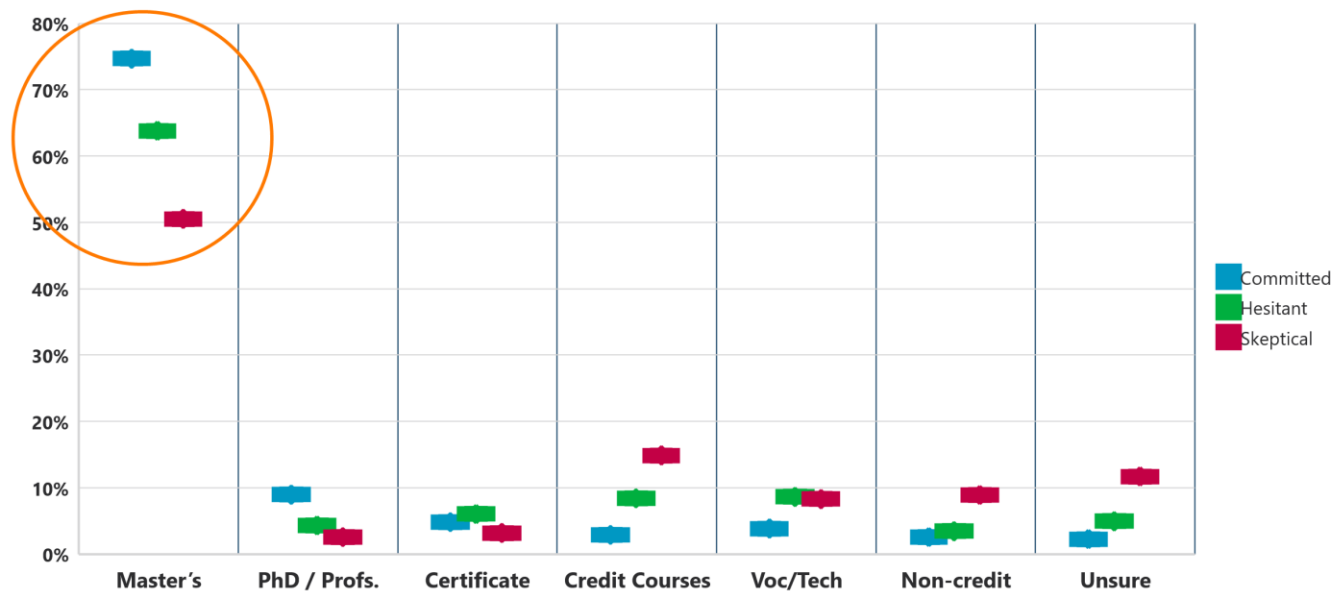
Source: Eduventures analysis and modelling of APS 2019 data.

*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

Bachelor's-Holder Prospects by Quality of Interest and Planned Postsecondary Pathway

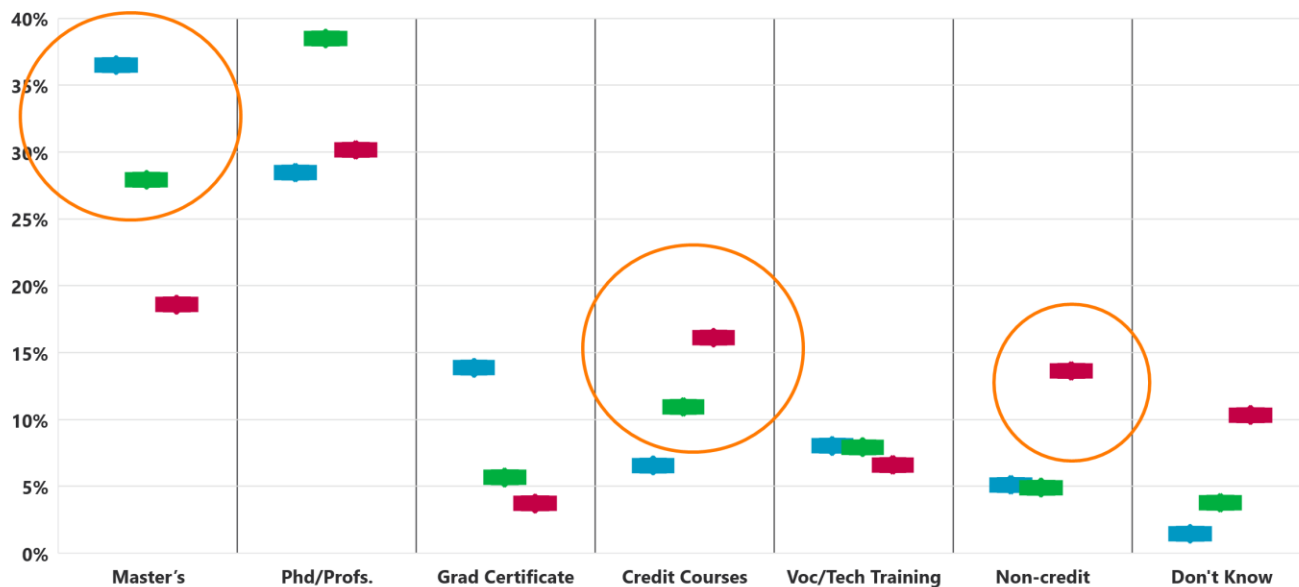


Source: Eduventures analysis and modelling of APS 2019 data.
*TMNO means "time/money no object".

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?

Education Plans & Decision-Making

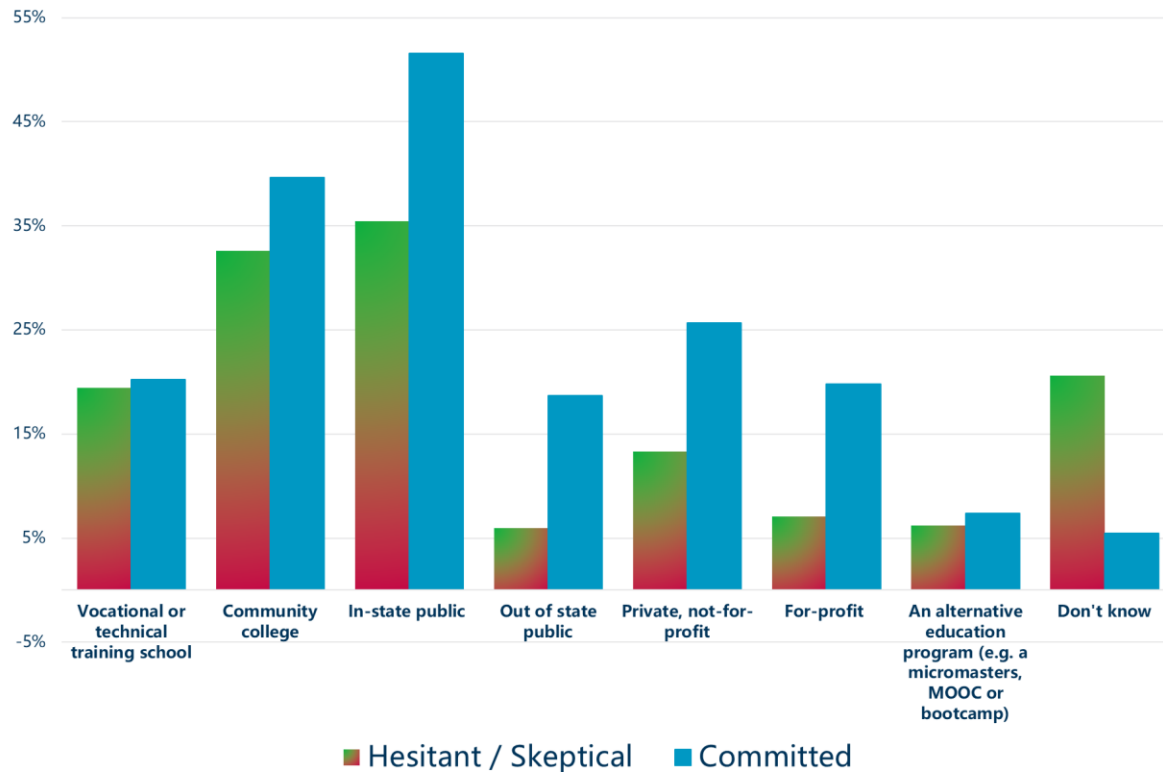
Across interest level, demographics, and employment status, the decision to return to school is a calculation of disruption, risk and reward.

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

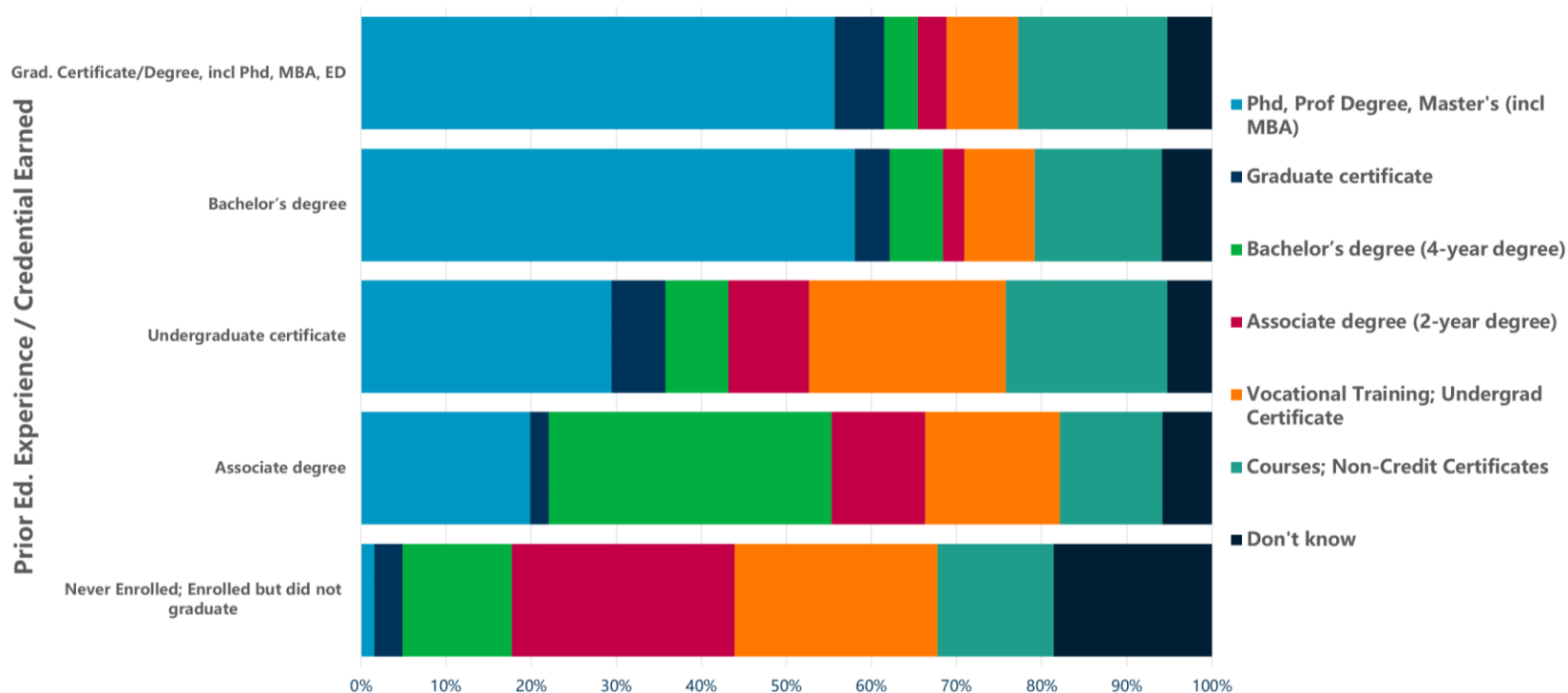


- Shallow enrollment interest favoring low-threshold of entry, except for “don’t know”
- Lagging interest in alt. credential providers



Attainment Impacting Pathway Goal

Educational Attainment & Desired Pathway Goal (Long-Term)



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**.

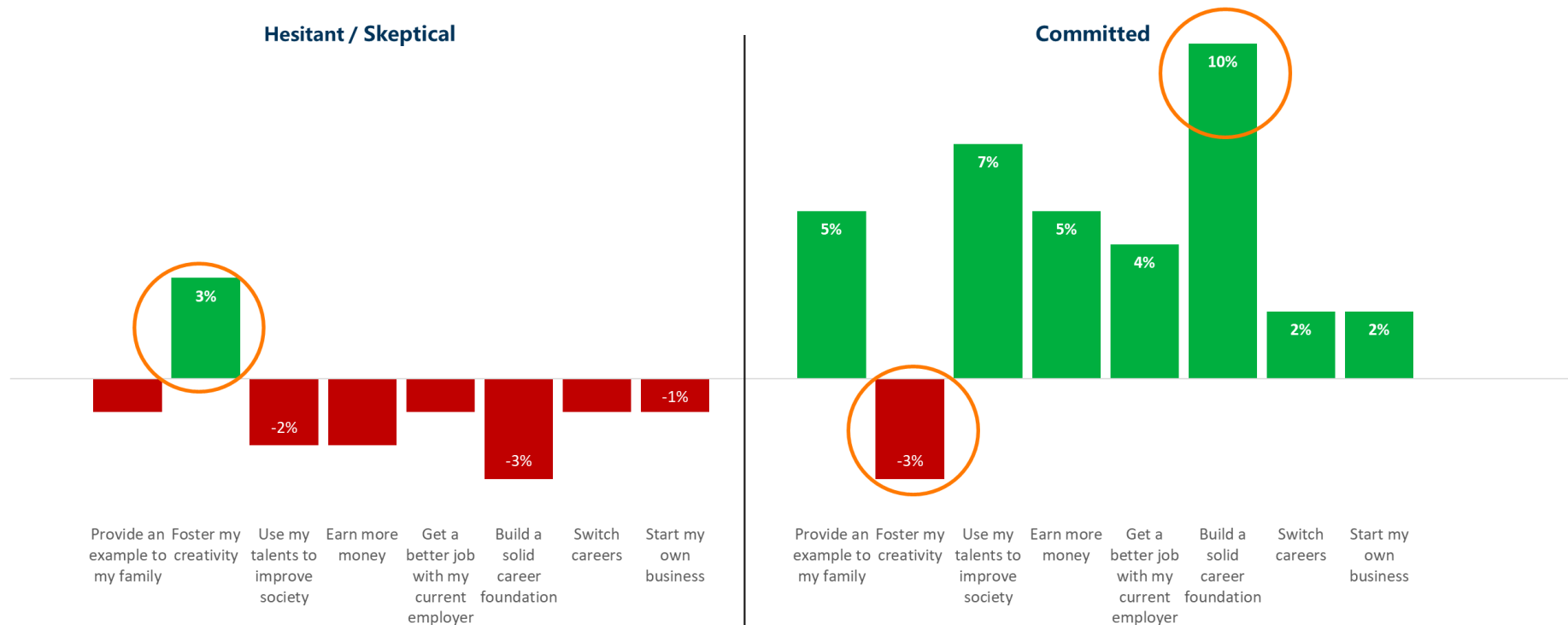
A threat to long-term upward degree / program mobility?

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

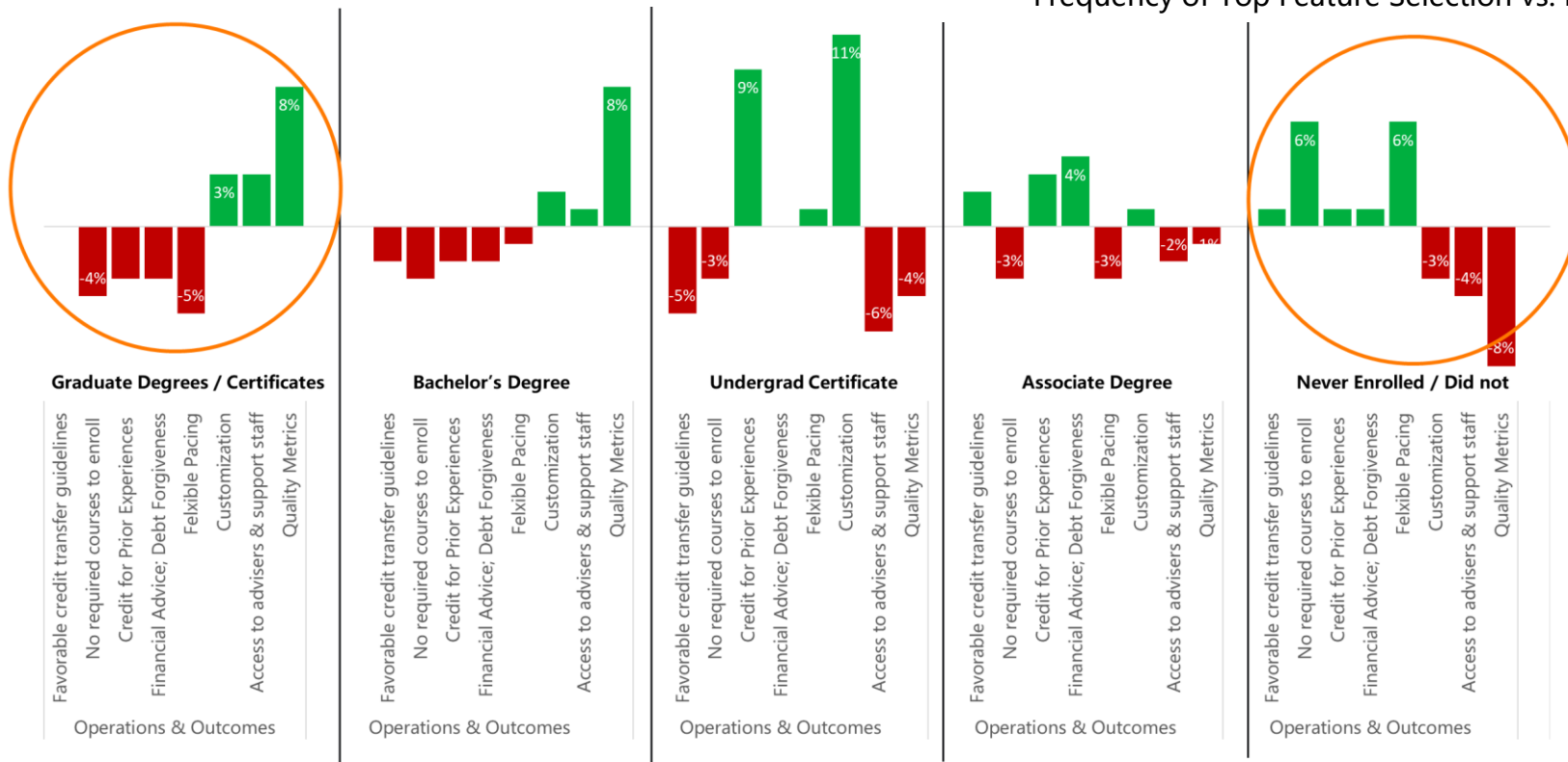
Graduate Degree-Holder Prospects by Quality of Interest and Planned Postsecondary Pathway



Top Desired Program Features by Prior Credential

Heightened Desire for Services, Quality Metrics, and Flexibility Among More Credentialed Prospects; Lower Threshold of Entry Sought by Their Less Credentialed Peers

Frequency of Top Feature Selection vs. Mean



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 policies + 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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