

The Adult Learner: An Eduventures Perspective

*Who They Are, What They Want, and
How to Reach Them*

Eduventures, a higher education research and consulting firm, has been closely tracking the adult learner market in order to help colleges and universities better understand this increasingly important demographic segment. The following paper is a synopsis of the characteristics, motivations, and preferences of today's adult learners, as well as the strategies for recruiting them. The data and analysis included in this paper will help colleges and universities face the challenges and respond to the opportunities the adult learner presents.

BACKGROUND

Today, fewer than 40% of American adults possess a higher education credential – an associate degree or higher.¹ Yet by 2025, it's estimated that in countries such as South Korea, Japan, and Canada, 55% of the adult populations will possess higher education degrees.²

If the United States doesn't want to be left behind, educationally speaking, it will have to hurry. By one estimate, we would have to increase our degree production by almost 40% annually and increase the number of degrees awarded by as many as 16 million during the next 17 years, above and beyond what we are already producing, in order to achieve a 55% higher education attainment rate.² Recently, U.S. Secretary of Education Margaret Spellings went a step further and challenged the United States to provide 20 million more Americans with access to higher education by 2025.³ If such a goal could be accomplished, it would require involving a far higher percentage of adults in higher learning.

A recent Department of Labor study indicates that 90% of the fastest growing jobs in the United States now require some form of postsecondary education. For that reason, adults are reconsidering higher education in growing numbers, often returning to school twice or more during their working lifetimes.

Furthermore, as the number of high school graduates peaks and the Baby Boom echo fades, and as competition for freshman enrollments becomes more fierce, growing numbers of institutions will recognize that this large segment of our population will soon be moving into the target age group for most forms of continuing and professional education.

There are a variety of strong arguments for urging our institutions of higher learning to better equip themselves to serve adult learners, ranging from the need to strengthen our nation's position on the global stage to improving the local economy, and from securing the financial sustainability of our colleges and universities themselves to ensuring opportunity for all Americans. In a very real sense, these arguments are closely connected, and maintaining our global and economic preeminence means being a leader in education. And in the near future, being a leader in higher education is going to mean being a leader in adult learning (see Figure 1 on page 3).

The question is: How is your institution going to respond to the opportunities and the challenges posed by the needs of adult learners?

Eduventures, a higher education research and consulting firm, has been tracking the adult learner market for nearly 10 years, particularly through its Continuing and Professional Education, Online Higher Education, and Summer Sessions Learning Collaboratives. Eduventures Learning Collaboratives are member-based research consortia that help institutions identify best management practices and improve the functioning of core processes across higher education.

In partnership with more than 300 universities, Eduventures has developed an extensive and unique research library designed to help higher education institutions better understand the adult learner market.

¹ U.S. Census Bureau

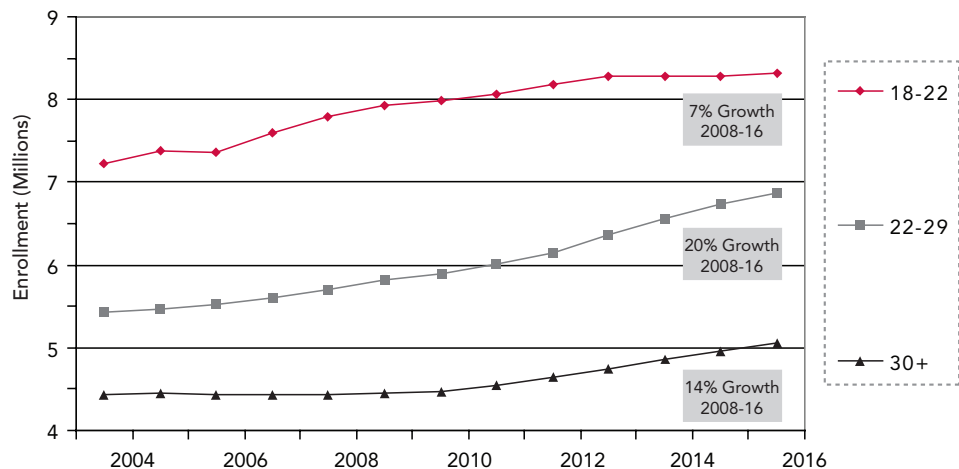
² *Adding it Up: State Challenges for Increasing College Access and Success*, The National Center for Higher Education Management Systems and Jobs for the Future for Making Opportunity Affordable, November 2007.

³ "U.S. Secretary of Education Margaret Spellings Delivers Remarks at the 2008 Higher Education Summit, 'A Test of Leadership' in Chicago." July 18, 2008. <http://www.ed.gov/news/pressreleases/2008/07/07182008.html>.

The following represents a synopsis of today’s adult learners – a snapshot of their characteristics, motivations, and preferences with respect to educational opportunities, as well as strategies for recruiting them. At Eduventures, we believe that such data and analysis can greatly enhance the ability of colleges and universities to understand where the adult learner market is heading and how to best make the case of the value of the adult learner to key constituents.

FIGURE 1.

Student Enrollment in 18 to 22, 22 to 29, and 30-Plus Age Groups



Source: U.S. Department of Education, National Center for Education Statistics (NCES) Projections of Education Statistics

THE ADULT LEARNER – A SNAPSHOT

So, just who is the adult learner – and, more specifically, what are the demographic characteristics of this group?

The typical adult learner is 38.8 years of age, has an average annual household income of approximately \$76,800, and is employed full time. A majority is married and one-third has dependent children younger than 18 living at home.

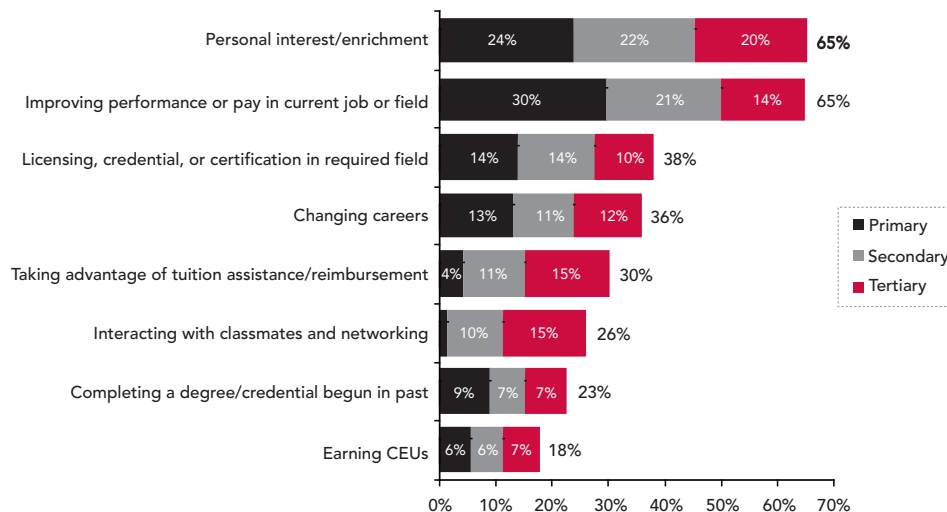
Along many dimensions, in fact, adult learners mirror the U.S. population at large. There is, however, one notable exception – they have higher incomes. The greatest number of adult learners are employed as professionals. Almost one-third work in management; business and financial operations; or in education, training, and library services.

In developing a profile of the adult learner, we also need to consider their motivations – that is, why they are pursuing or considering pursuing continuing and professional education. Understanding this can be invaluable to institutions in making decisions on overall strategy, marketing, programming and formatting, and curriculum development.

As Figure 2 highlights, the primary motivations for adult learners enrolling in college and university programs are personal enrichment and improving performance or pay in their current job or field. Improving performance or pay is the overriding motivation of approximately 30% of adult learners. Considered together, career-related themes are the primary reason that the majority of consumers

(63%) are pursuing continuing and professional education, while personal enrichment is an important secondary and tertiary motivation.

FIGURE 2.
Motivations for Enrolling



Source: Eduventures

MEETING THE NEEDS OF THE ADULT LEARNER – SCHEDULING, DELIVERY, AND FORMATTING

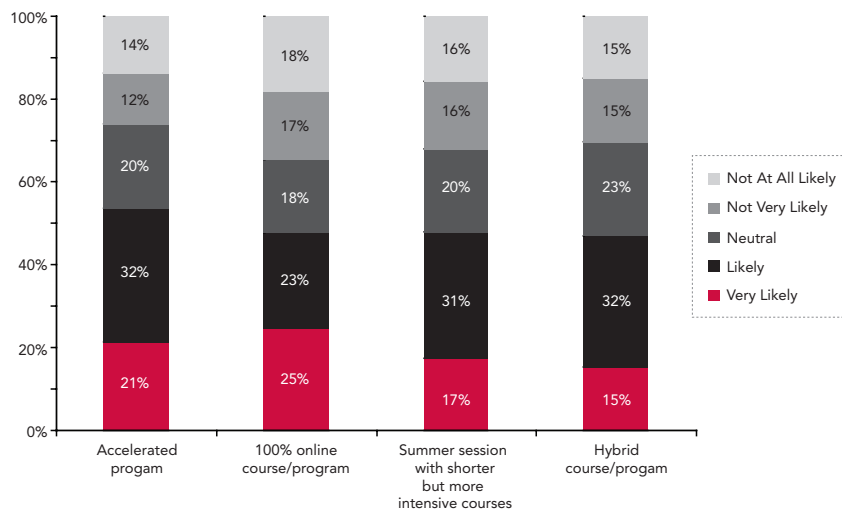
With most adult learners juggling work, the demands of home life, and education, it is no surprise that they have very different needs versus those of traditional college students with regard to scheduling, delivery modes, and formatting. Advocates credit adult learners for having spurred valuable innovation – particularly in terms of delivery formats – that benefits higher education as a whole.

Scheduling is the leading criterion for adult learners in selecting a college. It is also among the top three attributes adult learners evaluate when choosing a course or program. Recognizing this, many colleges and universities are becoming more flexible and creative in this area.

Of course, when it comes to scheduling, online learning provides adult learners with the kind of convenience and flexibility they have long sought, and they are embracing this delivery option in unprecedented numbers. Data from just a few years ago showed almost two-thirds of adult learners enrolled in or considered enrolling in a traditional classroom format at a college campus or branch learning center, but today students report interest in online (48%), hybrid (47%), and other alternative formats (see Figure 3).

FIGURE 3.

Likelihood of Enrolling in Various Non-Traditional Formats/Delivery Modes



Source: Eduventures

For-profit schools were prominent among online higher education pioneers, identifying strong resonance between the convenience messaging of distance learning and the needs and preferences of adult learners. In the wake of their success, many non-profit schools have effected similar service modifications and advances, in some cases building on long-standing continuing education and extension efforts.

Age plays a significant role in adult learners' attitudes toward online study; for the 25 to 34 age group, there is strong interest in both campus-based study and online-dominant options. For the 35 to 44 and 45 to 54 age groups, campus-based study falls out of favor, while online options are preferred. Conversely, for those 55 and older, campus-based study overwhelmingly is preferred.

Adult learners also increasingly favor other non-traditional formats – chief among them, accelerated programs. It should be noted, though, that interest in non-traditional formats in general and in accelerated programs, specifically, varies greatly based on motivation and demographic factors.

For example, students switching careers or looking to complete degrees are far and away the most likely to enroll in accelerated programs. And, in terms of other demographics, they are more likely to be young and/or from racial/ethnic minorities.

Adult learners in certain types of courses and programs also show a greater propensity to enroll in non-traditional course and program formats. Those, for instance, who are pursuing bachelor's degrees are among the most likely to enroll in 100% online, summer session, or accelerated programs.

REACHING AND ENGAGING THE ADULT LEARNER

Competition among colleges and universities for the adult learner is great and will intensify as more institutions come to recognize the economic potential of this fast-growing sector with growth rates

approximately twice as great as the traditional college market. The ability to expand their reach and engage the adult learner will be a determining factor in how successful schools will be both from a strategic and financial standpoint.

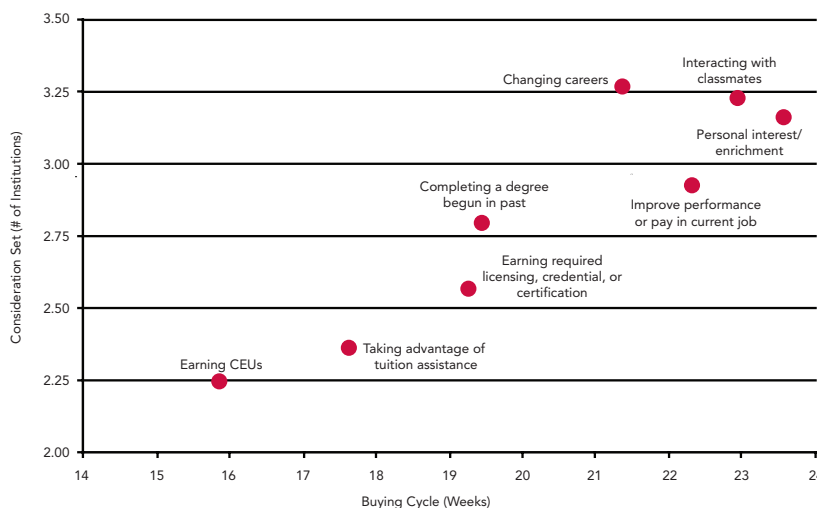
Colleges and universities that take a customer-centric approach to marketing – precisely identifying and mapping their offerings to adult learners’ preferences while communicating a message and value proposition that resonates with them – will be in the best position to prosper. It’s important to keep this in mind when looking at adult learners’ purchasing processes. Recent Eduventures data provides insight into the information sources they use, as well as the criteria they employ when selecting a course or program.

From the time they begin to research and consider colleges and courses, the typical adult learner takes approximately 21.5 weeks to make a final enrollment decision. During this period, they have evaluated, on average, three institutions – here defined as requesting information from, researching, or applying to a college.

The length of the decision-making process or buying cycle and number of institutions they are likely to consider differs significantly, however, depending on individual motivations and course and program type.

As Figure 4 indicates, the buying cycle is longest for adult learners looking to go back to school for personal rather than career-related reasons. These students are more apt to finance their educations with cash savings, making them more selective in the process.

FIGURE 4.
Buying Cycle and Consideration Set – By Primary Motivation



Source: Eduventures

Career-changers are also more selective than consumers in other motivational categories. As with adult learners seeking personal enrichment, career-changers also tend to pay a larger share of the cost of their educations. Moreover, the greater emphasis they place on the quality and portability of their educational experiences contributes to a more protracted decision-making process.

The least selective consumers are adult learners motivated primarily by earning continuing education units (CEUs) and those seeking to take advantage of tuition assistance. They consider a smaller number of institutions and take less time than other consumers to reach an enrollment decision.

The length of the buying cycle is also linked to the type of course or program the consumer is considering. Here, a pattern quickly emerges – the higher the level of the course or program, the more selective the consumer. For example, adult learners looking to pursue master's degrees are likely to consider more schools and take nearly twice as long in evaluating them as those interested in enrolling in non-credit courses.

In the course of the purchasing process, adult learners are exposed to a variety of marketing messages through a wide range of information sources or channels. In addition, most proactively seek out information on courses and programs to help them determine which institution can best meet their needs.

On both counts, the most important information sources cited in Eduventures' surveys were college and university Web sites and their online course catalogs. The Web site, in particular, is a crucial window into an institution, and in students' eyes, a quality Web site reflects the quality of the learning experience.

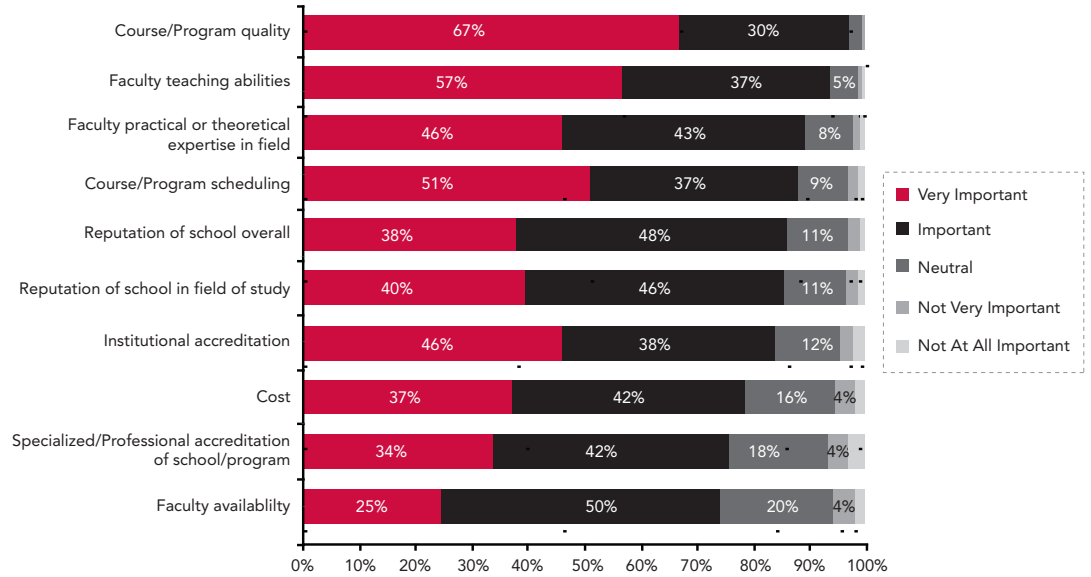
Web directories of college programs – e.g., Internet portals that serve as a guide for prospective students – and search engines also play important roles in increasing awareness on a general level and as sources for those seeking more information. Half of prospective adult learners report that they most commonly find out about or arrive at a school Web site via a search engine. Word-of-mouth – that is, contact with current and/or former students – also ranks high in importance.

As prospective students consider their enrollment options, they generally prioritize attributes – cost, scheduling, reputation, and class size among them. Understanding this hierarchy of needs can be highly beneficial to institutions in tailoring both their offerings and value proposition to the target market. Making high-priority information easily accessible, clear, and comprehensive on Web sites can create an important impression for prospective adult learners.

On average, adult learners are most concerned with quality – and, in particular, the qualifications of faculty. In addition, cost; the reputation of the college, both overall and in their field of study; and course scheduling show up as important considerations in the adult learner's evaluation of options (see Figure 5).

FIGURE 5.

Top 10 Attributes When Evaluating a Course, Certificate, or Degree Program (“Selection Criteria”)



Source: Eduventures

Note: The chart is sorted so the highest importance scores (the total of very important and important) are at the top, and the lowest importance scores are at the bottom.

It should be noted that both quality and cost are expected to be among the most important attributes of consumer decision-making in any context – the purchase of education, health insurance, even athletic equipment. However, when it comes to education, quality is generally paramount.

In considering price versus quality, consumers of education – and not just adult learners but all consumers – will generally try to balance the two. Many will, however, pay a premium for higher quality, while a small percentage will invariably seek the lowest priced option.

KEY TAKEAWAYS ON THE ADULT LEARNER

- The primary motivations for adult learners enrolling in college and university programs are personal enrichment and improving performance or pay in their current job or field.
- Scheduling is the leading criterion for adult learners in selecting a college.
- Adult learners are embracing online delivery options in unprecedented numbers.
- The most important information sources for adult learners in making enrollment decisions are college and university Web sites and their online course catalogs.
- Prospective adult students prioritize cost, scheduling, reputation, and class size when considering enrollment options.

CONCLUSION

During the last several decades, higher education in the United States has grown adult student participation dramatically. The question is whether America can or should be satisfied with current levels of adult participation.

Already, some states, such as Kentucky and Ohio, have ambitious plans to substantially grow higher education attainment among adults during the coming years, with a strong focus from public institutions on online delivery. Many institutions, both for-profit and non-profit, are in the midst of valuable experimentation around program design and delivery focused on adults. Indeed, growing numbers of universities recognize that by effectively serving the adult learner market they not only strengthen the sustainability of their own institutions, they also serve to strengthen the local and national economies. But most importantly, by focusing on the adult learner, colleges and universities meet one of their fundamental missions – improving the opportunities for great numbers of Americans.

Eduventures' forthcoming work in this area includes studies on Benchmarking and Profiling Continuing and Professional Education Operations, Deepening Understanding of the Adult Learner's Enrollment Decision-Making Process, and Surveying Students and Alumni of Online Programs. Our contribution to this effort is to better equip college and university leaders to make the right decisions with respect to organizational structures, program development decisions, and delivery platforms. To learn more, visit www.eduventures.com or e-mail info@eduventures.com.

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