

Engaging the New Adult Learner ... on Their Terms

Jim Fong, UPCEA
Chief Research Officer

November 8, 2023



Quiz





The Higher Education Landscape



2023 Survey of

College and University Presidents

A SURVEY BY *INSIDE HIGHER ED* AND HANOVER RESEARCH

SCOTT JASCHIK & DOUG LEDERMAN
EDITORS, *INSIDE HIGHER ED*

KEY FINDINGS

- Most presidents are confident that their institution will be financially stable over the next 5 to 10 years. More than three quarters “somewhat agree” or “strongly agree” that they are confident their institution will be financially stable over the next five (83 percent) and 10 (78 percent) years. Those figures are up slightly from 2022.
- More than half of presidents agree that their institution is more financially stable now than it was in 2019. And most campus leaders expect their institution to be better off next year than it is now, with 58 percent disagreeing (20 percent strongly) that their institution is “more financially stable now than I expect it to be a year from now.”
- Almost two-thirds of presidents who reported that their institutions are less financially stable now than in 2019 cited decreased net tuition revenue and increased salary and benefits expenses as the reasons why. About two-thirds of presidents who said their institutions were more financially stable now than in 2019 cited increased revenue from sources such as charitable giving, government support or auxiliary enterprises as the reasons why. That was likely due to the continued impact of federal stimulus dollars.



Headlines in Higher Education

After a Decade of Growth, Degree Earners Decline

The number of undergraduate degree earners fell last year for the first time since 2012. Is it a bump in the road or a harbinger of a changing higher ed landscape?

Feb 17,
2023



Mar 9, 2023

FORTUNE

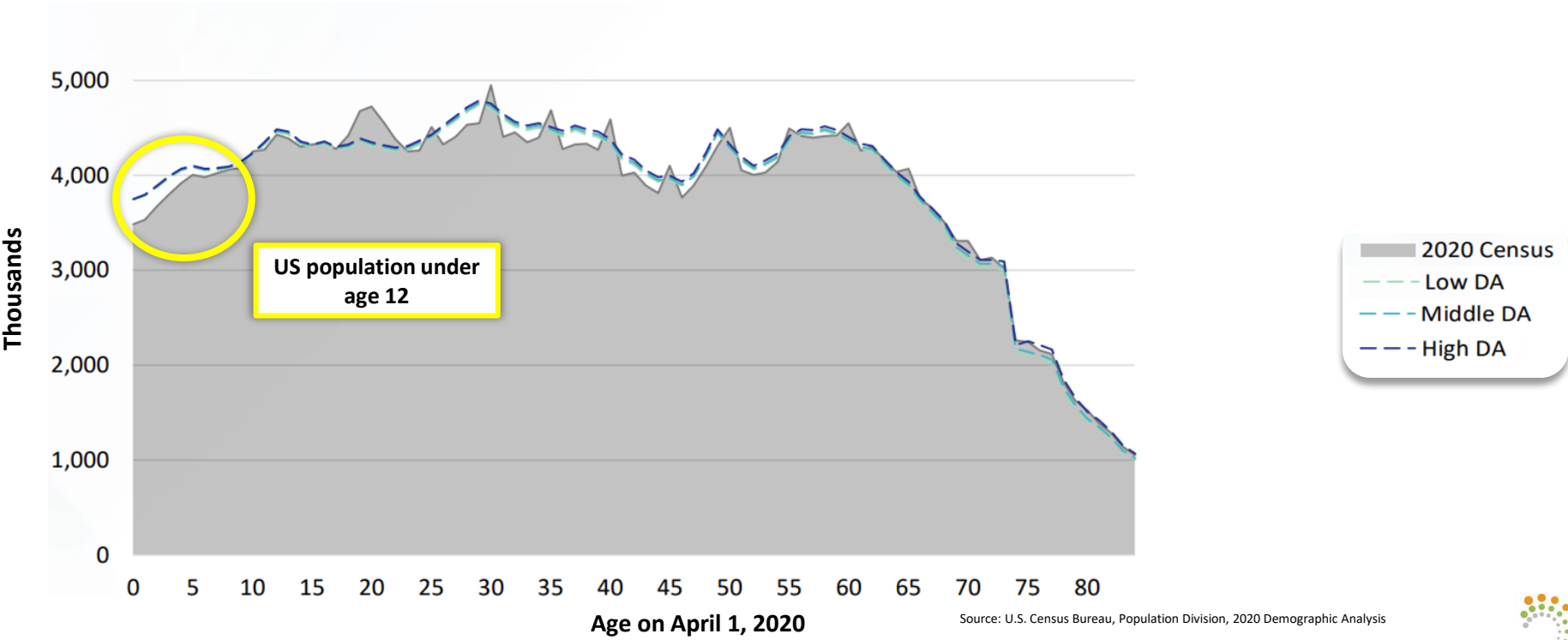
The labor shortage is pushing American colleges into crisis, with the plunge in enrollment the worst ever recorded

Mar 29, 2023

THE WALL STREET JOURNAL.

More High-School Grads Forgo College in Hot Labor Market

FEWER TRADITIONAL COLLEGE AGE STUDENTS (U.S.) MOVING FORWARD

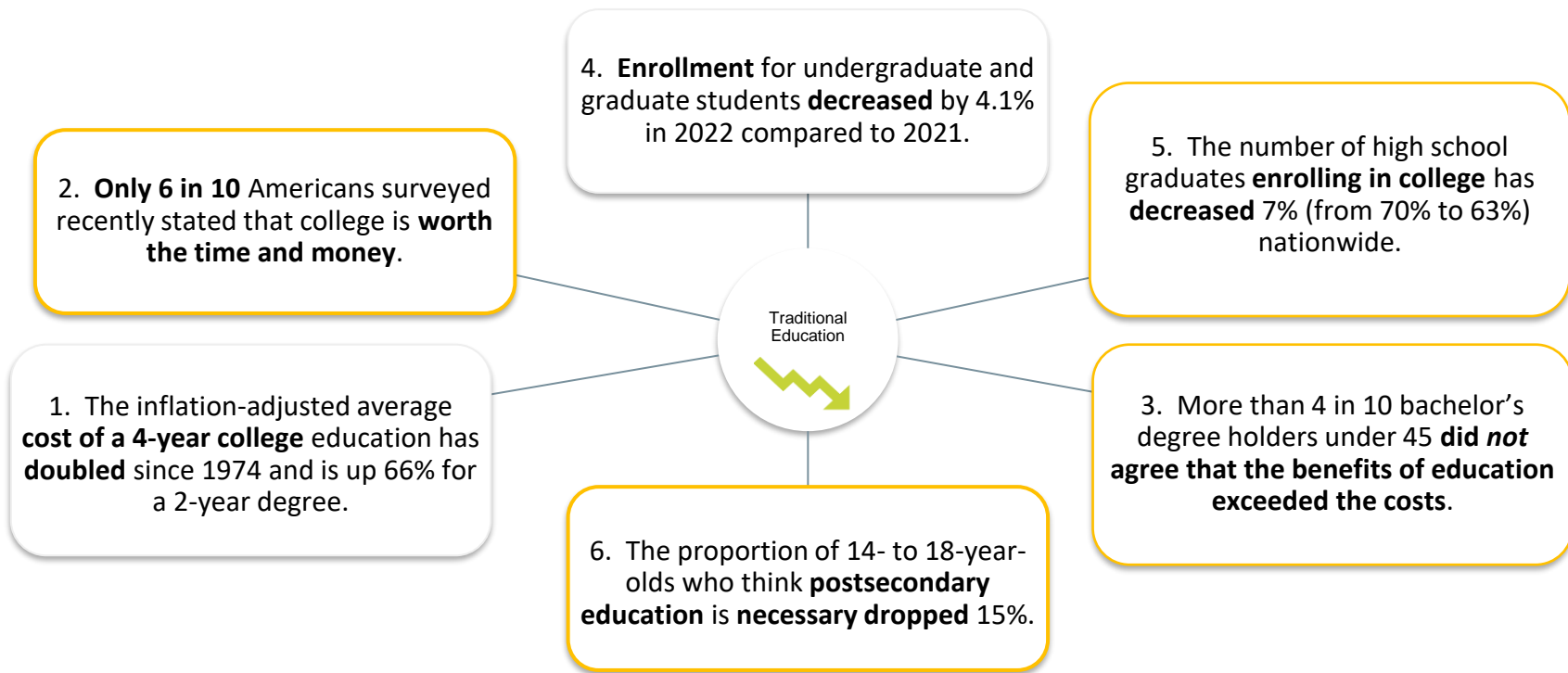


Source: U.S. Census Bureau, Population Division, 2020 Demographic Analysis



We Have a Value and Perception Problem in Higher Education

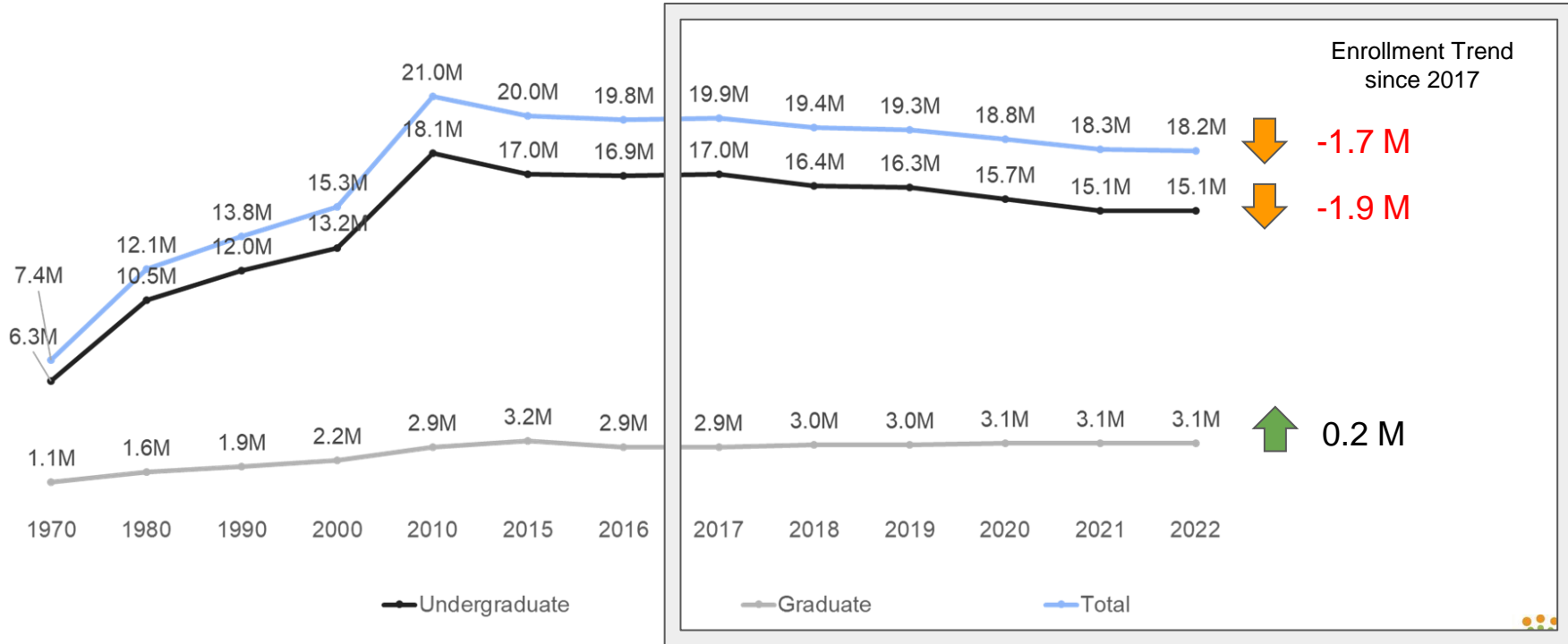
Enrollment and perception of necessity & value decline



(Hechinger Report: Inside Higher Ed)
Source: <https://hechingerreport.org/how-higher-education-lost-its-shine/>
<https://www.insidehighered.com/views/2022/09/16/higher-ed-must-change-or-degenerate>
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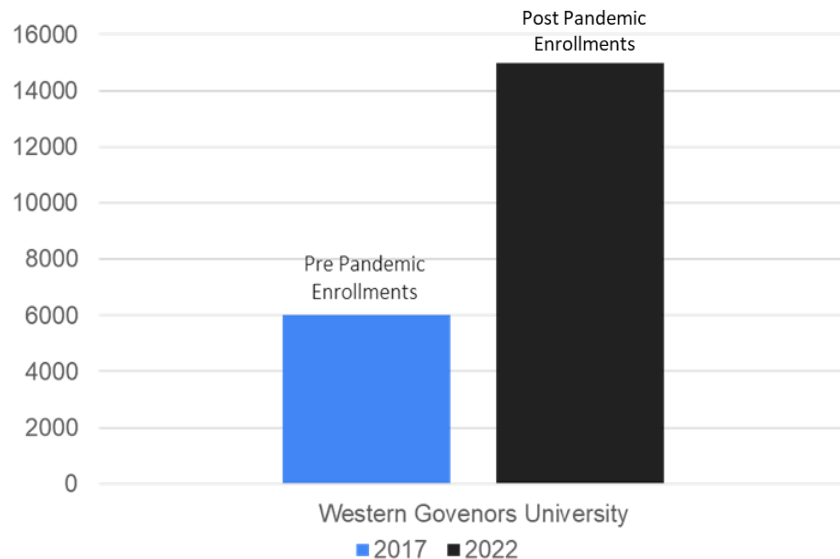
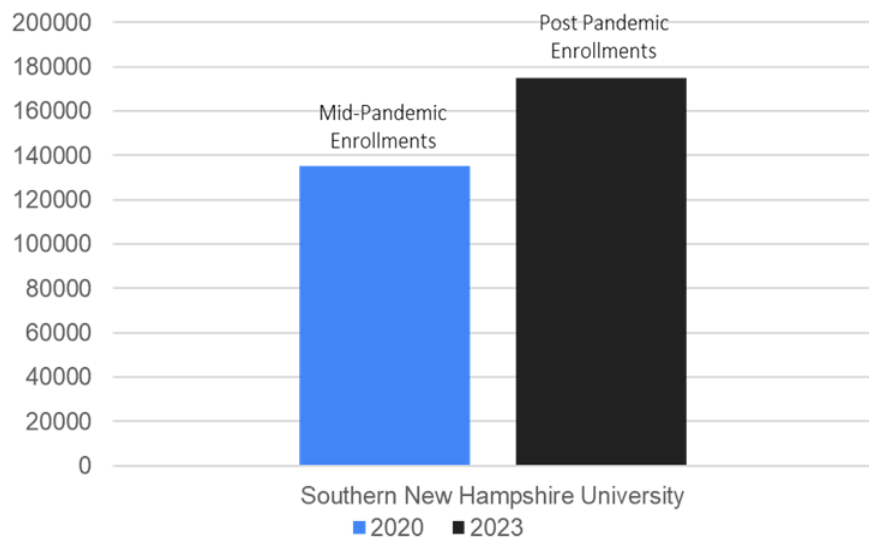
U.S. ENROLLMENT TRENDS OF TRADITIONAL AUDIENCES

Louisiana has declined 8% since 2019, especially among two-year institutions



CHANGES IN ONLINE ENROLLMENT SINCE THE PANDEMIC

Will the Large Institutions Command a Larger % of the Market?



An Expanding Demographic in the U.S.: The Emergence of Younger Students to Fully Online programs

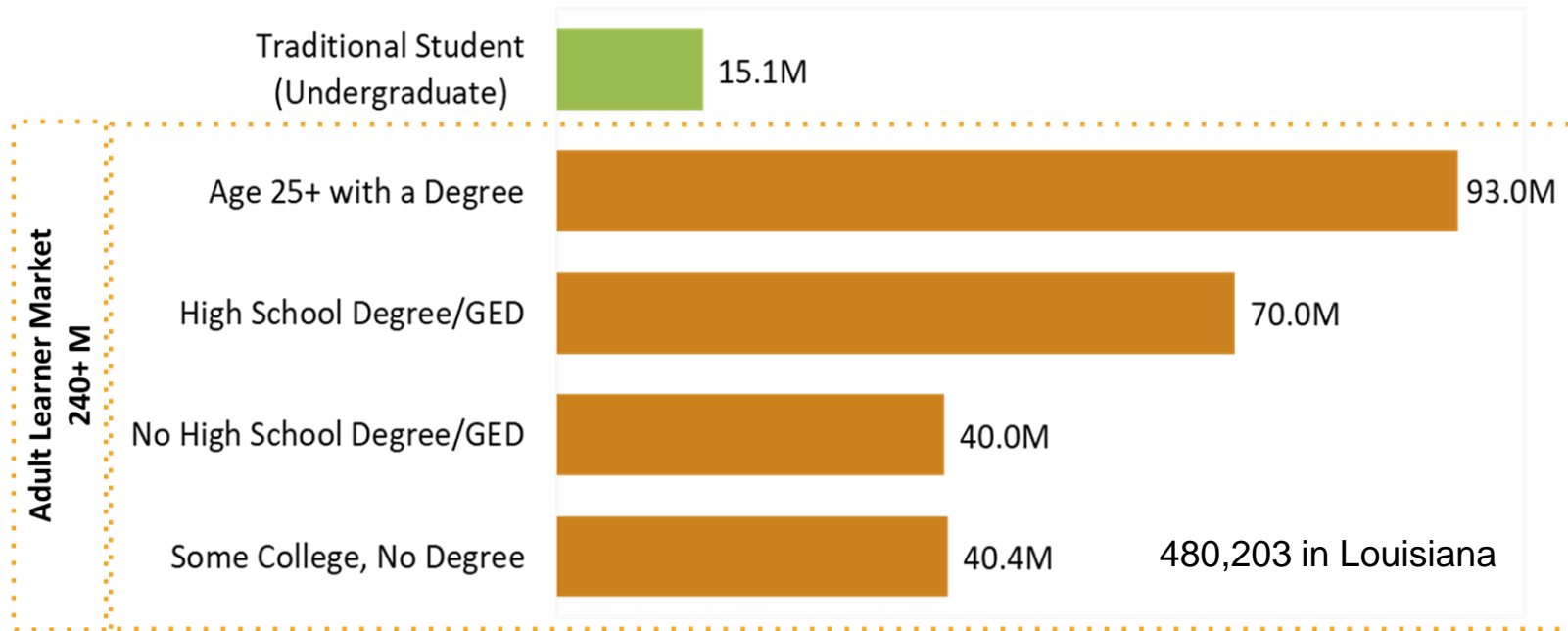
- 18-24 is the fastest-growing age group of those applying to online universities.
- Young students are seeking out **new information/experiences, and career paths**



- Number of high schoolers applying to online colleges and universities **doubled** from 0.28 to 0.72 % of all applicants.
- Through online education, students can get **multiple certifications and a degree** at the same time as a single degree takes in traditional education.

Source: <https://www.educationdynamics.com/online-college-students-in-2023-what-matters-most/>

In the U.S., We Will Need to Diversify Our Offerings to Offset the Demographic Cliff



Students

Some College, No Degree (1.9 million in Illinois)
who say: Stackable credentials would greatly
increase interest in pursuing a degree

76%

Overall

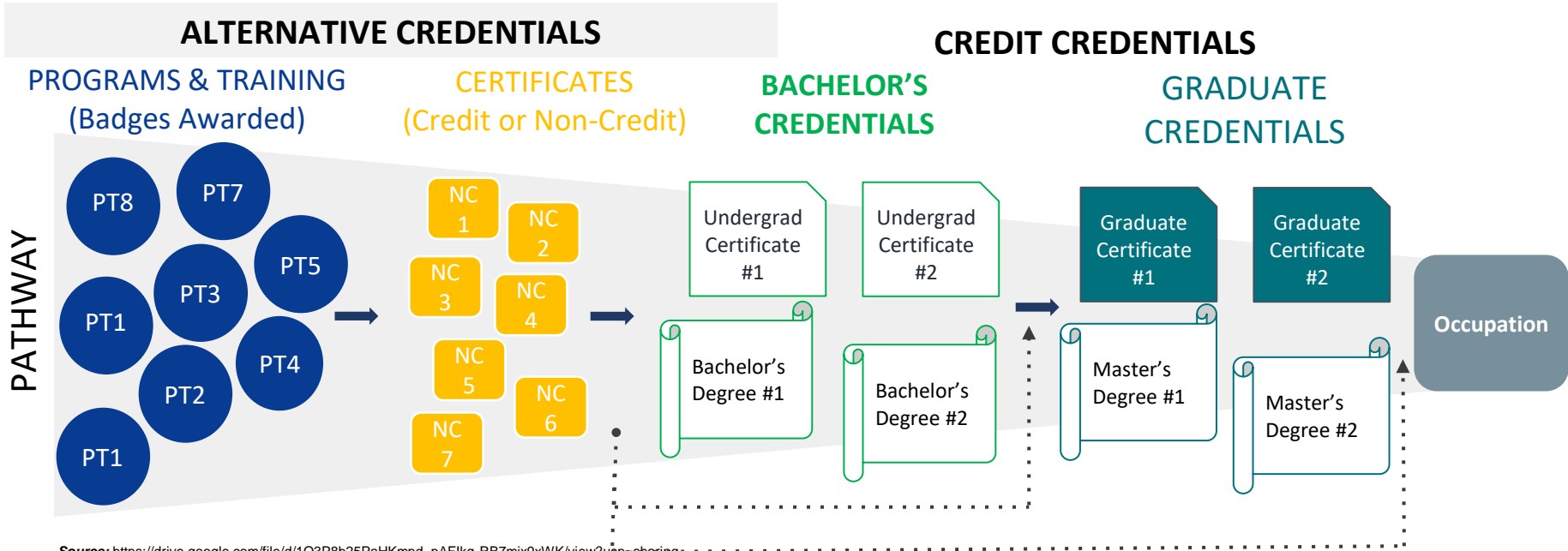
92%

18-22 year olds!

78%

Mid-level workers

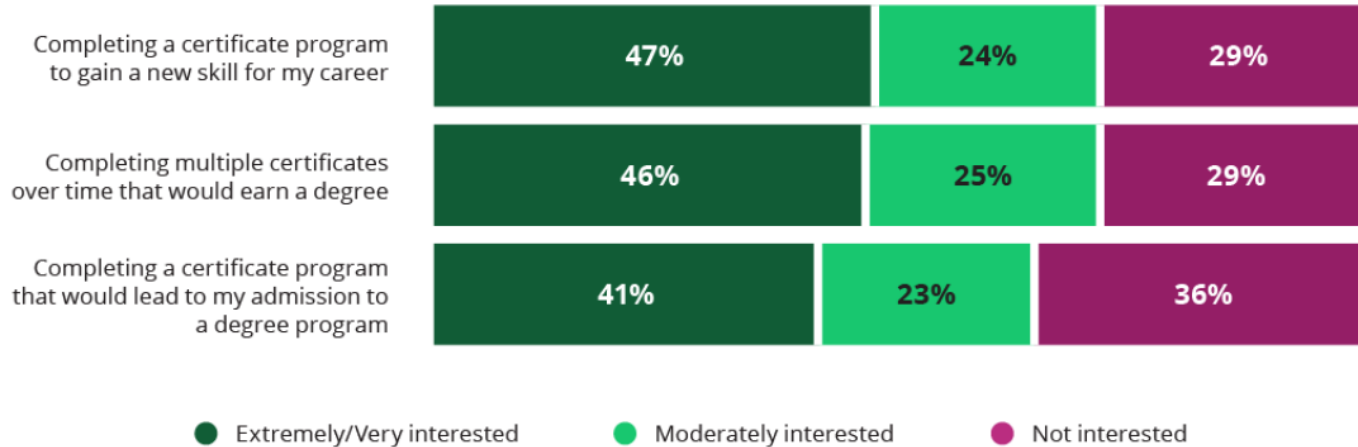
Ideal Stackable Pathway Map: Degree and Non-degree Credentials



CERTIFICATES AND STACKABLES

(U.S. data, 2023)

How interested would you be in the following certificate options if they were available in your subject area of interest, but you couldn't use financial aid to help pay for them?





Carnegie Classifications to Make Major Changes in How Colleges and Universities Are Grouped and Recognized, Set Clear Threshold for Highest Level of Research

November 01, 2023



ADMINISTRATION ▾ ENROLLMENT ▾ ACADEMICS ▾ WELLNESS/STUDENT SUCCESS ▾ OPINION/SPECIAL CONTENT ▾

ACE is restructuring the Carnegie Classification. Will your school benefit?

The labels for Carnegie's updated classification system are not etched in stone, and it

HIGHERED DIVE Deep Dive Opinion Library Events Press Releases

Ed Tech Policy & Legal Leadership Students Enrollment For-Profit Faculty and Staff

ACE debuts revised metrics for achieving R1 status

The new methodology, part of the organization's rework of the Carnegie Classifications, will take effect in 2025.

Published Nov. 1, 2023



A Quick Look at the Generations and the New Adult Learner in the U.S.

Generation Z 1997 -2012



68 million
Account for 13% of the
U.S. workforce

- Ages 11-26
- Grew up surrounded by technology
- Barely remember 9/11
- Shaped by mass shootings and helicopter parents
- Highly prioritize social change racial equity
- Most racially diverse
- Climate-change focused

Millennials 1981-1996



72.1 million
Account for 44% of
the U.S. workforce

- Ages 27-42
- iPhone generation
- Introduced job-hopping trend
- Creators of the sharing economy
- Financial habits shaped by 2008 financial crisis
- 9/11 impacted
- Often maintain multiple social media accounts

Generation X 1965-1980



65.2 million
Account for 19.9% of
the U.S. workforce

- Ages 41-56
- Forgotten over time, but recently emergent
- “Yuppies”
- Average 7 career changes in their lifetime
- “MTV Generation”
- “Late to marry, quick to divorce”
- Independent, resourceful, and self-sufficient

Baby Boomers 1946-1964



71.6 million and
declining
Account for 23.2% of
the U.S. workforce

- Ages 57-75
- The first TV generation
- Largest consumers of “traditional media”
- Lived through JFK and Martin Luther King assassinations
- Strong physical work ethic and goal oriented

Sources: <http://fourhooks.com/marketing/the-generation-guide-millennials-gen-x-y-z-and-baby-boomers-art5910718593/>
<https://cabcollects.com/building-a-multigenerational-workforce/>
<https://www.bls.gov/emp/tables/civilian-labor-force-summary.htm>

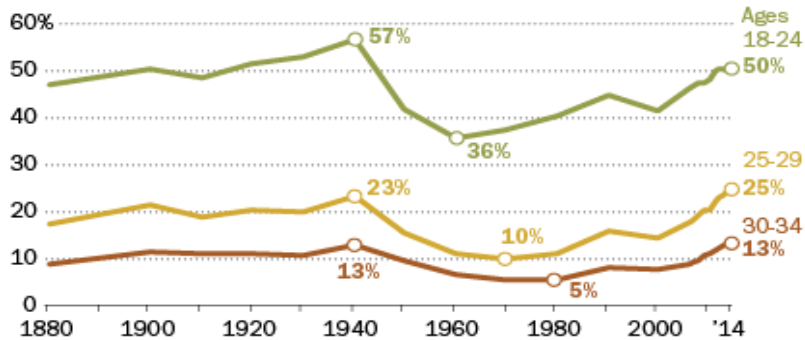
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Generation Z and Intergenerational Living

More of Generation Z are beginning to live at home to save money and reduce debts in efforts to afford a home because housing prices are rising and less homes are available.

Record share of 25- to 34-year-olds living in parents' home

Share of U.S. young adults (ages 18-34) living in their parent(s)' home, by age



Note: "Living in parent(s)' home" means residing in a household headed by a parent regardless of the young adult's partnership status.

Source: Pew Research Center tabulations of the 1880-2000 U.S. decennial censuses and the 2006-2014 American Community Surveys (IPUMS).

PEW RESEARCH CENTER

More than half of the young adults between 18-24 living at home are Gen Z.

Source: <https://archive.curbed.com/2017/10/10/16450394/millennial-living-at-home-housing-homeownership/>

Generation Z shop for food like they do institutions of higher education

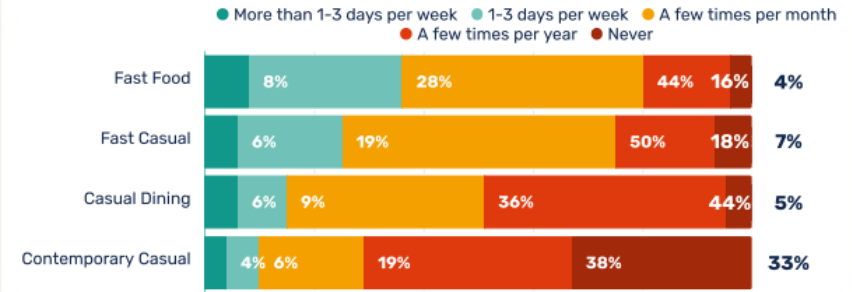
- Gen Z spends on average \$3,046 per year on groceries.
- 50% say their food and beverages choices have a significant or moderate environmental income
- 72% of Gen Z is cooking more frequently since the pandemic and social distancing
- 53% of Gen Z respondents say they find inspiration for new foods through TikTok
- Gen Z wants to try new foods, and they are drawn to places offering sustainable, organic, locally grown items on menus.

<https://www.gobankingrates.com/saving-money/food/how-much-money-gen-z-vs-boomers-spend-on-groceries/>

<https://hospitalitynewsny.com/what-gen-z-wants-a-look-inside-their-food-preferences/>

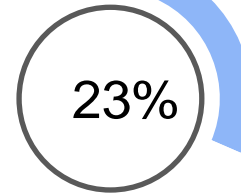
<https://goknit.com/gen-z-research-how-the-global-pandemic-made-chefs-out-of-gen-z/>

Gen Z's Restaurant Visit Frequency by Category



Source: <https://www.fermag.com/articles/generation-z-loves-fast-food/>

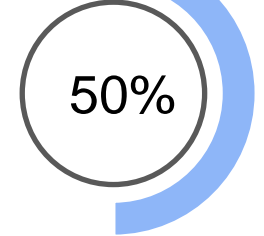
Food Focused



23% of the wallet of Gen Z is spent on food.

Source: <https://hospitalitynewsny.com/what-gen-z-wants-a-look-inside-their-food-preferences/>

Health Conscious

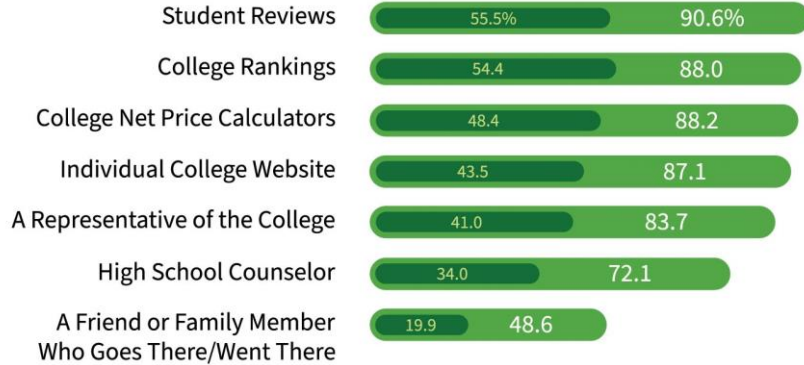


50% of Gen Z say they would pay more for healthier food.

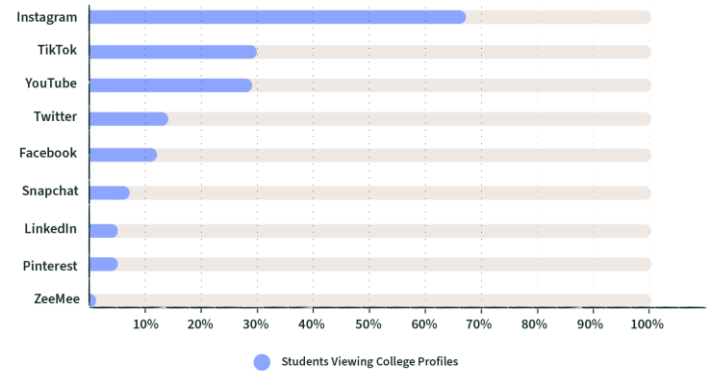
Similar to how they behave as consumers, Generation Z will do their due diligence. This includes the search for Higher Ed.

Resources Used When Deciding Where to Apply:

● % Placing Some Importance On ● % Placing Very/Extreme Importance On



Social Media Usage for College Search



2022 Survey of Juniors Searching for College

Student reviews and college rankings are the two most important resources to searching for a college.

Source: <https://www.niche.com/about/enrollment-insights/students-rank-the-most-important-resources-for-their-college-search-decision-making-process/>

Instagram is the most used social media platform to search for colleges.

Source: <https://www.niche.com/about/enrollment-insights/2022-survey-of-juniors-searching-for-college/>

Adult Learner Perspectives: A Summary of the UPCEA 2021-2022 Research on the New Adult Learner



Valentina

Female

Age 25 to 29

Gen Z/ Young
M

Pop. 11.4
Million



Amir

Male

Age 25 to 29

Gen Z/ Young
M

Pop. 11.8
Million



Elise

Female

Age 30 to 34

Middle
Millennial

Pop. 11.1
Million



Michael

Male

Age 30 to 34

Middle
Millennial

Pop. 11.3
Million



Jennifer

Female

Age 35 to 44

Older M/
Gen X

Pop. 20.1
Million



David

Male

Age 35 to 44

Older M/
Gen X

Pop. 21.1
Million

 + 

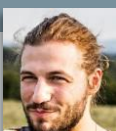








Adult Learner Insights: Alternative Credentials for Adult Learner Segments



Valentina Amir Elise Michael Jennifer David

	Valentina	Amir	Elise	Michael	Jennifer	David
Colleges and Universities Can't Keep Up with the Economy (Strongly Agree/Agree)	61% (b)	53% (a)	54% (a)	63% (b)	47% (c)	57% (a)
Very Cost-Sensitive	59%	60%	53%	45%	53%	32%
Stackable Credentials Provide Greater Value to <u>me</u> (Strongly Agree/Agree)	66%	60%	74%	72%	60%	75%
Stackable Credentials are Extremely/Very Valuable	44%	46%	49%	46%	34%	46%

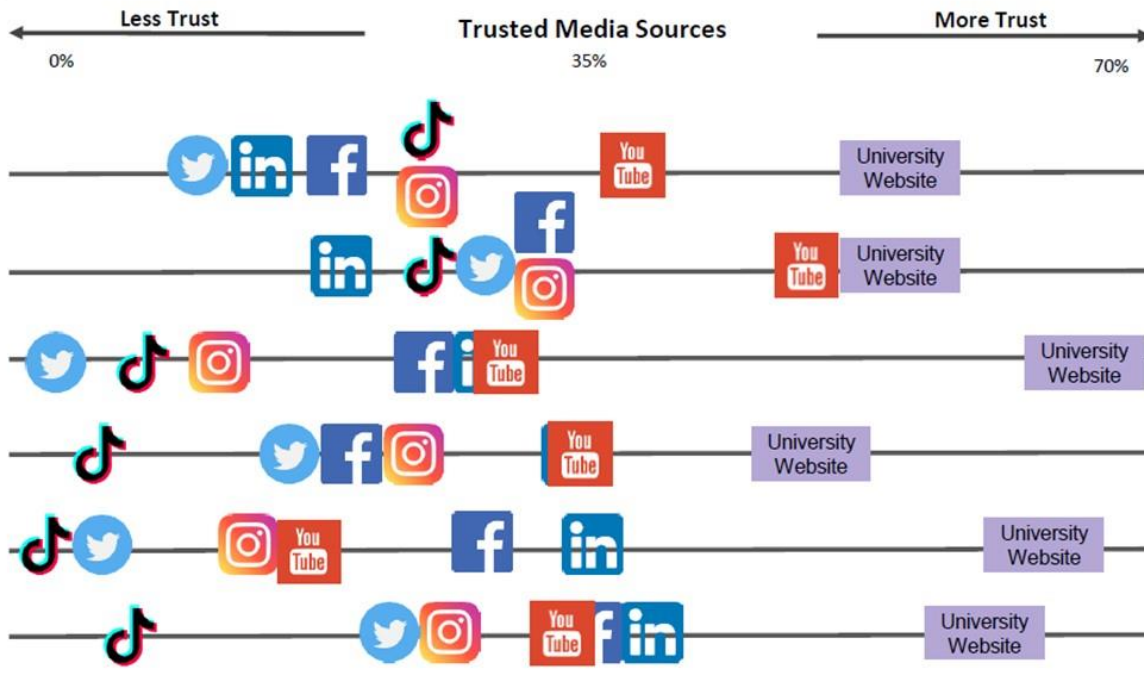


We Assume that Use of TikTok and Twitter has Changed since 2021

2021

We posed the question:

What are trusted media sources when considering a continuing education or training program?



Slipping Through the Cracks

Understanding
PCO Unit
SEO Capabilities

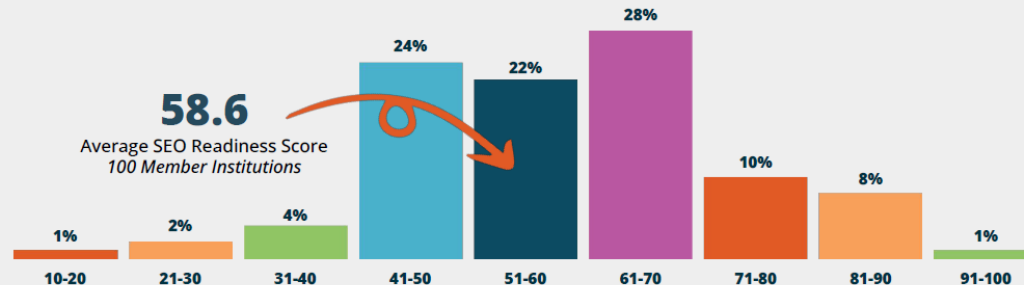


THE IMPACT BY SEARCH INFLUENCE

Marketing departments must make a concerted effort to regularly keep institutional leadership informed of critical data points to advocate for additional resources and emphasize the importance of SEO to long-term program viability.

The analysis of the SEO readiness of PCO units indicates an **urgent need for SEO improvement**. Among the 100 UPCEA institutions profiled in the member SEO readiness exercise, the average score was 58.6. Only 19% had an excellent score.

Figure 29: Overall Score (n=100)



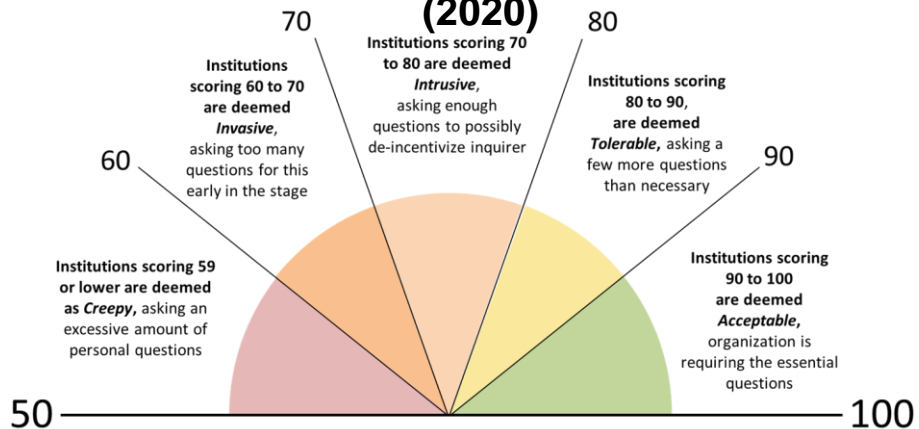
KEY FINDINGS

- 1 Marketing and institutional leaders alike see SEO as foundational, but admit their PCO units lack an SEO strategy
- 2 Institutional leadership often lacks reporting
- 3 UPCEA members performed poorly in an SEO audit

We often ask excessive questions and then don't respond!

Request for Information (RFI) Forms

(2020)



[RFI Form White Paper](#)

Enrollment Review Process

(2021)

1,000 Inquiries

100 Members

58% received a response

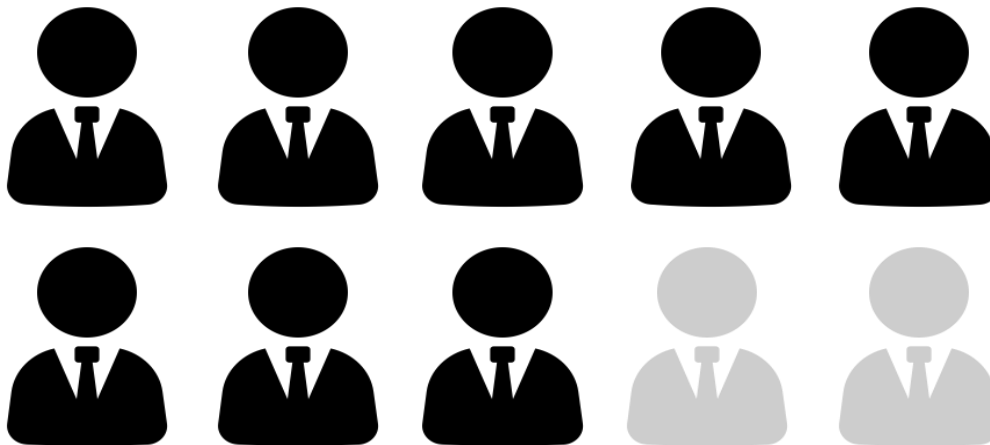
11 hours & 47 minutes

Average response time

EMPLOYERS DEMAND A STACKABLE PATHWAY

24% express great interest,

56% express that their interest would increase



UPCEA/Collegis Study: 80% of U.S. employers surveyed say a stackable model would **increase** their organization's interest in non-degree or alternative credentials (n=511)

Employers Value Microcredentials

74% helped fill existing skills gaps

73% improved workforce quality

71% more accepting of microcredentials

Institutions are Starting to Embrace New Credentials

54%

institution has embraced alternative credentials

60%

credential initiatives are aligned with their institutional strategic plan

71%

it will help campus with revenue and enrollment goals

Thank you

Jim Fong

Chief Research Officer

UPCEA



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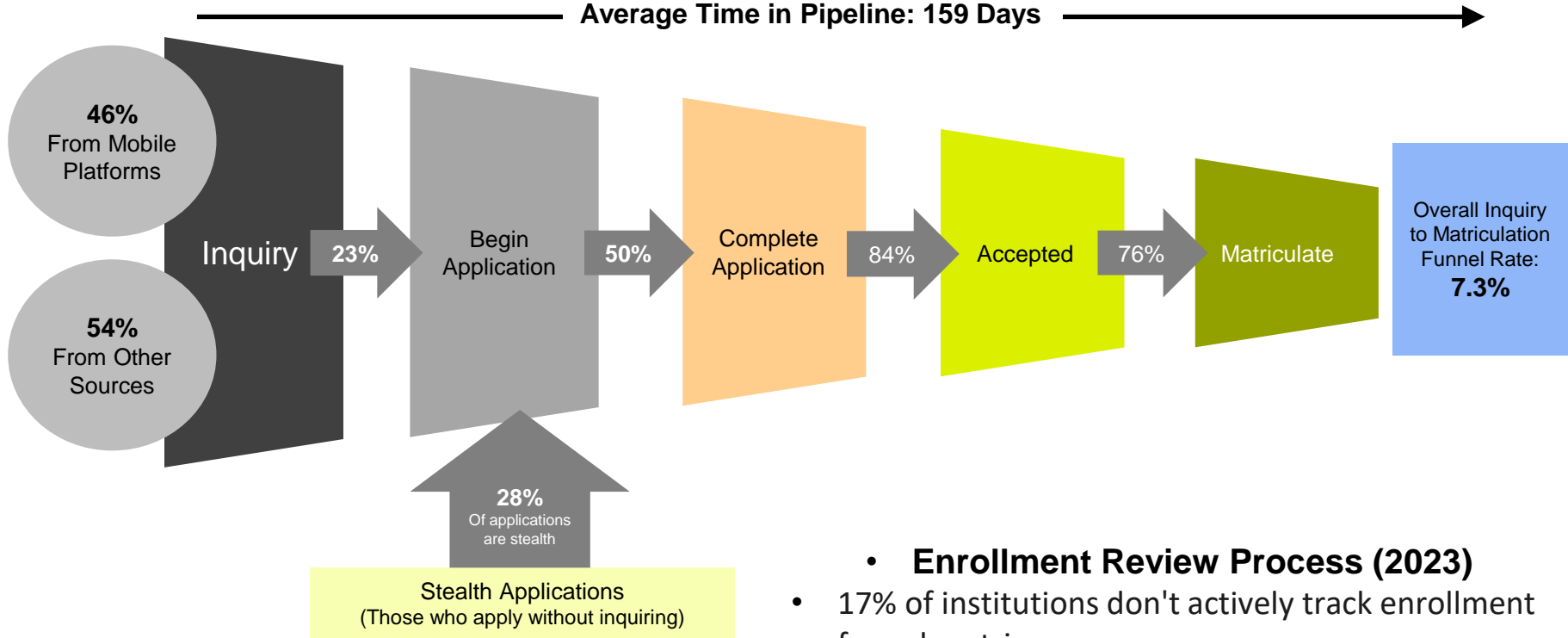


[@jimfongUPCEA](https://twitter.com/@jimfongUPCEA)



[linkedin.com/in/jimfong](https://www.linkedin.com/in/jimfong)

Enrollment Funnel Overview – 2018 *(New Results in 12/2023)*



- **Enrollment Review Process (2023)**
- 17% of institutions don't actively track enrollment funnel metrics
- The stealth application rate for credit-bearing programs is 43%

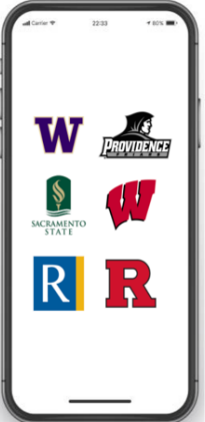
Love/RFI



Phase 1

"Swipe" or Indicate interest in 10 individuals

Select certain institutions based on website appearance, price, program offered, etc.



Phase 2

App asks more intimate questions about users political beliefs, social habits, etc.

Request for information to learn more about the personality of the institutions



Phase 3

"Do you want to get a cup of coffee" - Potential Match

You tell the university about yourself



Phase 4

Congrats! It's a match!

Congratulations! Welcome!

Basic Information

Relationship to Student

Full Name

Country *

Address Line 1 *

City *

Student E-mail Address *

Verify E-mail *

Student Cellphone - -

Parent E-Mail:

Parent Cellphone: - -

Ask for too many points of contact

Request for information page too general, for it is the same form for undergraduate, graduate and continuing education inquiries

Enrollment Information

Which best describes you? *

Which campus are you interested in? *

When do you plan to enroll? *

Academic Interests 1 *

Academic Interests 2

Request More Information

Please mail me additional information Yes

Login Information

Please create your user name and password in the space below to access your myWSU page.

User Name *

Password *

Passwords must be between 8-30 characters, contain at least 1 uppercase letter (A-Z), 1 lowercase letter (a-z), 1 number (0-9), and 1 of the following special characters: !@#\$%^&*()_+|=~\{};:<>?,./ Spaces are not allowed.

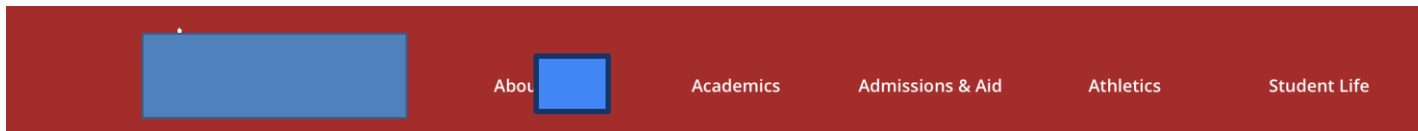
Verify Password *

I acknowledge by submitting this form my data is available to this institution.

[Privacy Policy](#)

Ask inquirer to create an account to submit information

Worst Practices



I want to learn more about 

* required

First Name:*

Preferred:

Middle:

Last:*


Suffix:

Email Address:*

Verify Email Address:*

Date of Birth:*

What type of student are you currently?*

Where do you plan on taking classes?*
 

**When do you plan to start college?
Year:***

Student's Mobile Phone #:

May we text you?

- Yes
 No

Mailing Address:*

Country

Street

City

State

Postal Code

Phone:

Ask for two sets of phone numbers



February 8	February 7	February 10
<p>4:52 PM Missed call</p>	<p>4:20 PM Missed call</p>	<p>3:04 PM Missed call</p>
<p>1:29 PM Missed call</p>	<p>2:45 PM Missed call</p>	<p>9:44 AM Missed call</p>
<p>11:41 AM Missed call</p>		February 9
<p>10:31 AM Missed call</p>	<p>1:34 PM Missed call</p>	<p>6:48 PM Missed call</p>
<p>9:20 AM Missed call</p>	<p>12:56 PM Missed call</p>	<p>2:59 PM Missed call</p>
		<p>10:34 AM Missed call</p>

February 15
<p>10:46 AM Missed call</p>
February 14
<p>4:39 PM Missed call</p>
<p>1:57 PM Missed call</p>
<p>10:48 AM Missed call</p>
February 13
<p>4:06 PM Missed call</p>
<p>11:48 AM Missed call</p>

Plus at least 1 text messages a day and sometimes 2 (Feb 15 to 18)

Worst Practices

Confirm Your Email Address*

Search for your current school*

 Homeschooled
 Not in school/school not found

Student Type*

Entry Term*

Would you like to share additional information with us at this time?*

Yes
 No

Submit

Program Information

Degree being sought
 Associate Bachelor's Certificate Unsure

Associate program

Certificate program

Bachelor's programs

Type of Study
 Online On Campus

Anticipated Start Term

Anticipated Start Year

US Armed Forces Status

How did you hear about us?

What is the most recent school you have attended? (Choose "Unknown School" if there is no exact match)

Additional Comments, Questions, or Requests (max 255 characters)

Would you like materials mailed to you?
 Yes No

Could have been grouped into one question or asked before entering RFI form.