



UNDERSTANDING THE

Shifting Adult Learner Mindset

Insights for Growth from
EAB's Adult Learner Survey



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Executive Summary

Understanding Adult Learners Is Critical to Growth

As projections for undergraduate enrollment wane, many colleges and universities are looking to adult learner programs for growth and revenue. However, the adult learner market is complex, and adult learners' mindsets are shifting. In order to gain market share and effectively recruit students, institutions need to understand how today's adult learners think.

To help our partners better understand this mindset, EAB recently conducted a survey of current and prospective students of graduate, undergraduate degree completion, online, and certificate programs. As we will elaborate in the following pages, the responses indicate that today's adult learners are savvy, digital consumers who approach their education with a consumer-like mindset.

Summary of Key Findings

- **Adult learners require a return on their education.** Before enrolling, students want evidence that the investment they'll make in their education will result in a substantial, positive impact on their lifestyle.
- **Adult learners are digital consumers—with high expectations.** With the rise of smartphones and advanced consumer analytics, adult learners' expectations for brand interactions have been transformed. When researching and applying to schools, they expect to be able to find relevant information and complete tasks quickly and conveniently using digital resources.
- **Adult learners are extremely pragmatic.** Adult learners are savvy navigators of the application process, approaching it with purpose and focus, strategically limiting the number of steps and amount of time involved.
- **Adult learners require flexible options.** To ensure that they can balance school with existing personal and professional obligations, many adult learners are interested in flexible options in program format and schedule, such as online, part-time, and hybrid programs.



Adult Learners Require a **Return on Their Education**

THEME

1

Cost Concerns Loom Large for Prospective Students

A Climate That Drives Cost-Consciousness

Total student debt in the United States hit 1.5 trillion dollars in 2018, which amounts to more than two and a half times the sum owed just a decade earlier. Throughout this period, national media have widely reported on the student debt crisis, shaping public perceptions—and concerns—about the cost of higher education.

At the same time, robust economic recovery has made the prospect of leaving the workforce less appealing than ever for many potential adult learners. The price of an education now includes not just tuition and fees, but also the opportunity cost of abandoning a well-paying job. Our research indicates that today's prospective adult learners approach their options highly focused on perceived value, both in terms of enrollment costs and expected career benefits.

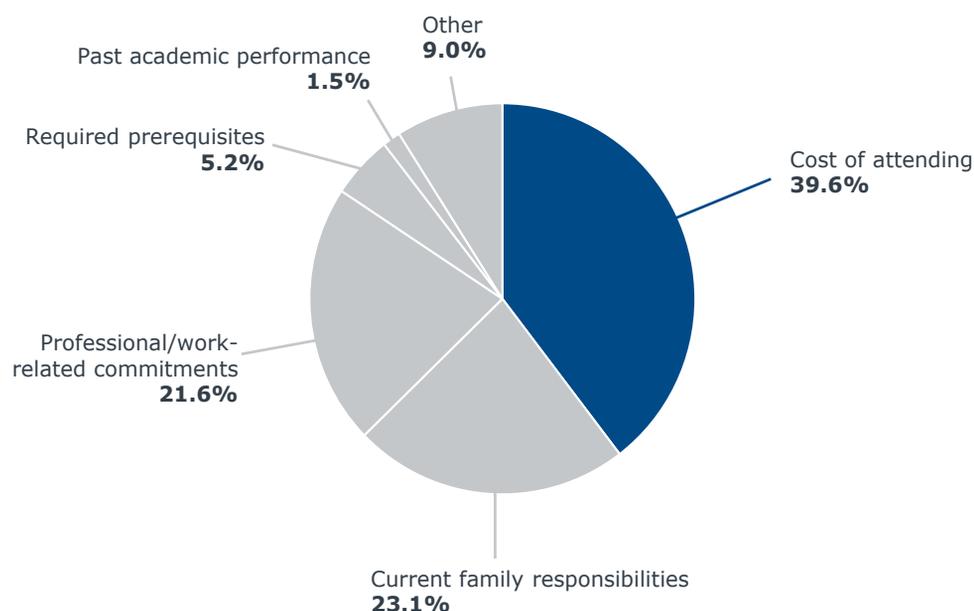
Cost Is the Top Reason for Not Returning to School

All survey participants were asked whether they planned to continue their education within the next two years by enrolling in an undergraduate, graduate, professional degree, or certificate program. Those who indicated that they either did not plan to continue their education or that they had not yet decided whether they would continue were then asked what would change their plans. Financial factors topped the list, with 49.6% of participants saying that they would change their plans and consider going back to school if tuition were more affordable, and 29.3% of participants saying they would do so if it gave them the opportunity to earn more money.

Participants who had indicated a general interest in enrolling, but not within the next two years, were asked the primary reason they were not pursuing more education at this time. Cost was the top reason, named by 39.6% of participants.

Figure 1: Cost Is the Top Factor Preventing Interested Prospects from Enrolling

Q: What would you say is the primary reason you are not pursuing more education at this time?



Sources: https://www.federalreserve.gov/releases/g19/HIST/cc_hist_memo_levels.html, EAB research and analysis.

Finances Govern Where and Whether Prospects Enroll

Financial Factors Are Central to Students' Enrollment Decisions

Not only do financial considerations inform adult learners' general interest in returning to school, but they also influence whether and where students choose to enroll. Participants who were either planning to enroll or were currently enrolled were asked to rank the importance of a list of factors in their enrollment decision. Aside from program accreditation, they named financial considerations as most important.

This data aligns with the finding that the majority (68.5%) of this group had considered enrolling in public institutions, where tuition and fees tend to be lower than at their private counterparts. By contrast, a total of 41.1% of participants considered private or independent institutions.

Figure 2: Cost and Financial Aid Rank Highly in Enrollment Decisions

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

Most Important Factors	Mean	Least Important Factors	Mean
Program accreditation	4.32	Physical facilities	2.82
Cost of attending	4.08	No prerequisites to enroll in the program	2.72
Financial aid/scholarships	3.82	Size of the school	2.44

Many Students Rely Heavily on Financial Support from Institutions

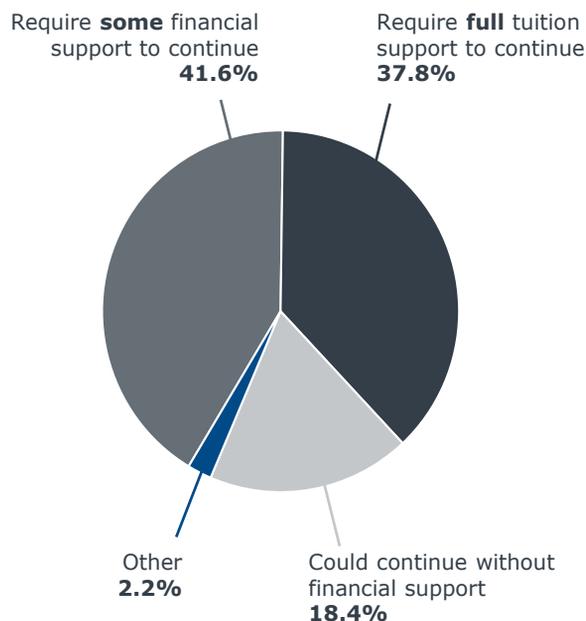
While the strong economy and public rhetoric about student debt undoubtedly feed into concerns about enrollment cost, our research underscores the fact that program tuition and fees represent a substantial investment for adult learners and one that most couldn't afford on their own.

The majority of participants who were enrolled or who had plans to enroll indicated that they would receive financial support from institutions and/or employers:

- Financial aid/loans and grants (54.6%)
- Scholarships (39.7%)
- My employer/tuition reimbursement plan (21.7%)
- Graduate assistantships (11.5%)
- Other institutional support in the form of tuition stipends (6.2%)

Of the students who were receiving financial aid and/or scholarships from an institution, 79.4% indicated that they would need at least some financial support to continue their education.

Figure 3: One in Three Financial Aid Recipients Requires Full Tuition Support



Source: EAB research and analysis.

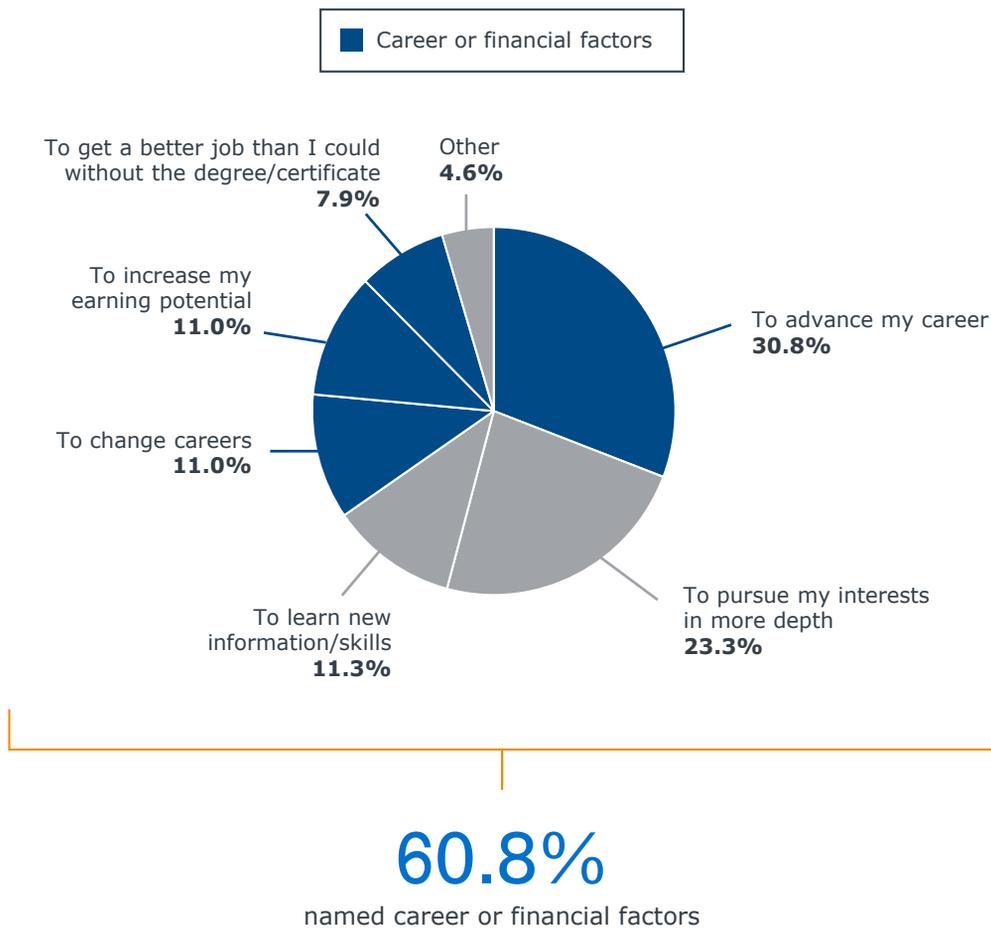
The Flip Side: Finances and Career Are Top Motivators

Career and Financial Growth Are the Main Drivers for Pursuing Education Further

The weight of financial factors is reflected not just in adult learners' concerns about their education but also in their motivations for enrolling and their definitions of successful post-enrollment outcomes. Of the students who were planning to enroll or were currently enrolled, 60.8% named career or financial factors as the primary reason for their interest in furthering their education, as represented in blue in Figure 4. These findings indicate a strong desire from adult learners to see a direct return on their investment in education, either in terms of career mobility or earning potential.

Figure 4: Interest in Education Is Primarily Driven by Career and Finances

Q: What would you say is your primary reason for furthering your education?





Adult Learners Are **Digital Consumers—** with **High Expectations**

THEME

2

Heightened Expectations for Brands and Schools

Today's Consumers Expect Brands to Anticipate Their Intent and Facilitate Action

With the rise of sophisticated mobile apps and advanced consumer analytics, consumers' expectations of brands have been transformed in recent years. Whether they're ordering groceries for at-home delivery via a mobile app, browsing streaming movie options, or completing an online banking transfer, today's consumers have heightened expectations for the speed and convenience with which they can access useful information and complete tasks. For example, research by Google found that only 9% of users will stay on a mobile site or app if it doesn't satisfy their needs (e.g., to find information or navigate quickly). Furthermore, 53% of mobile site visits are abandoned if the site takes longer than three seconds to load.

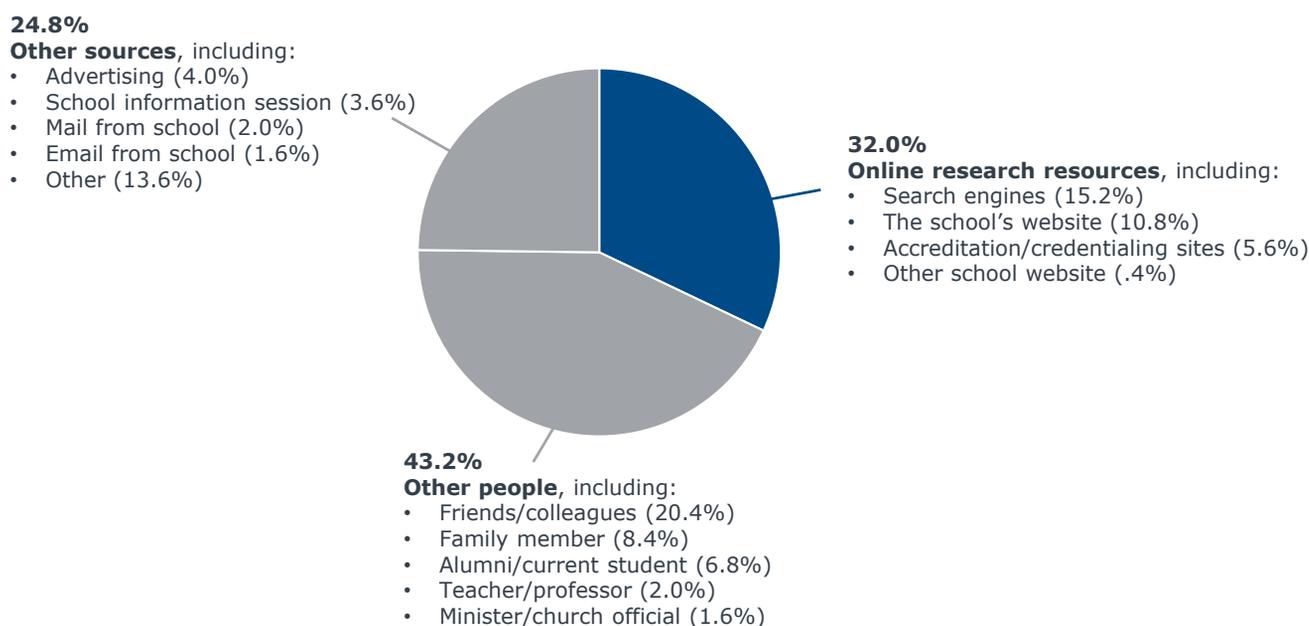
Our research indicates that these trends apply to adult learners as well. Throughout the research, application, and enrollment processes, adult learners expect to find relevant information and complete required tasks quickly and conveniently using digital resources.

Cater to Prospect Intent at the Discovery Phase with Robust Online Research Resources

Currently enrolled survey participants were asked how they first learned of their institution. We found that 43% of currently enrolled students discovered their school via individuals, including friends, colleagues, family, and alumni, and 32% first learned of their school via online research resources, including search engines, the school's website, and accreditation websites. This data indicates that the availability and quality of self-serve online resources at the start of a student's enrollment journey can have a significant impact on program selection. Furthermore, it's important to note that, while word of mouth is the top source of discovery, after students first hear about schools from any source, they are likely to conduct online research as a next step.

Figure 5: Most Students Discover Schools via Online Research or Word of Mouth

Q: Where did you first learn of the school where you are enrolled?



Sources: <https://www.thinkwithgoogle.com/marketing-resources/micro-moments/how-to-beat-consumer-tune-out-with-useful-content/>, <https://www.thinkwithgoogle.com/consumer-insights/consumer-immediate-need-mobile-experiences/>, EAB research and analysis.

Deliver the Right Information at the Right Time

Students Demand Responsiveness and Accessibility as They Research Programs

As students continue to gather information about prospective programs, the accessibility of relevant information remains important. Survey participants who either planned to enroll or who were currently enrolled were asked to rank the importance of a variety of contacts and communications in their program search. The factor that was named as most important was a school’s responsiveness to the student’s inquiries, with a mean score of 4.05, or “very important.”

Other top responses to this question indicate that adult learners expect schools not only to respond quickly, but also to proactively anticipate their interest and intent by making relevant information readily available at opportune times. This is illustrated by the second-most important response, the resources available on the school’s website, and the third-most important response, email communications from the school. Both contacts and communications had mean scores of “important” to “very important.” Given the prevalence of stealth shopping behavior in adult learner recruitment, this data illustrates the critical need for institutions to provide high-quality, self-serve resources online and to respond promptly to inquiries.

Figure 6: Prospects Value Responsiveness and Accessibility of Information

Q: Indicate how important the following contacts and communications were when searching for information about your current institution/have been in your search for information about furthering your education.

Contacts and Communications with a Mean Score of 3 or Higher	Mean	
School’s responsiveness to my inquiries	4.05	School responsiveness
Resources available on the school’s website	3.99	
Email communications from the school	3.71	Helpful information from the school
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	

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

How Negative Experiences Can Influence Enrollment

An Illustration of Poor Customer Experience

Survey participants were asked to describe their experiences with the application process and issues they encountered. Several of these responses demonstrate the impact that a student's recruitment experience can have on their perception of an institution. While these examples represent the extreme end of the spectrum of student experiences, they illustrate the ways insufficient or delayed communication from institutions can be a source of frustration for applicants and even influence their enrollment decisions.

“

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.**

—Adult Learner Survey Participant

”

“

The application process was fine. **My only concern was how long it took to hear back from someone.** I started to feel like I must not have made it in.

—Adult Learner Survey Participant

”



Adult Learners Are **Extremely Pragmatic**

THEME

3

Approaching the Application Process Strategically

Concerns About Value and Time Lead to a Pragmatic Approach

Given the strong economy and students' reservations about finances, many prospective adult learners are uncertain about whether the value of pursuing their education outweighs the cost of getting a degree. As they navigate the search and application process, many aim to minimize wasted time and resources put toward applying to institutions when they may not ultimately end up deciding to enroll anywhere. Our research indicates that adult learners are savvy navigators of the application process, approaching it with purpose and focus, strategically limiting the number of steps and amount of time involved.

Almost Half of Applicants Applied Only to One School

Adult learners' pragmatism is evident in the low number of schools to which the majority apply. Survey participants who had applied to one or more schools were asked to provide the number of school or program applications they had completed. Over 43% percent had applied only to a single school or program, and over 75% had applied to three or fewer schools or programs. Despite the low number of schools to which students ultimately applied, it's important to note that prospects may be considering and researching significantly more options, which reinforces the need for effective marketing outreach at this stage.

Our data also indicated variation in application behavior by age. Students under the age of 26 were much more likely to have applied to more programs than were their older counterparts. This data reinforces the notion that employment is often the top competitor to adult learner enrollment because older applicants, who were more likely to be established in their careers, were more likely to be applying to a single school.

Figure 7: Most Applicants Submit Two or Fewer Applications

Q: To how many schools/programs did you apply?

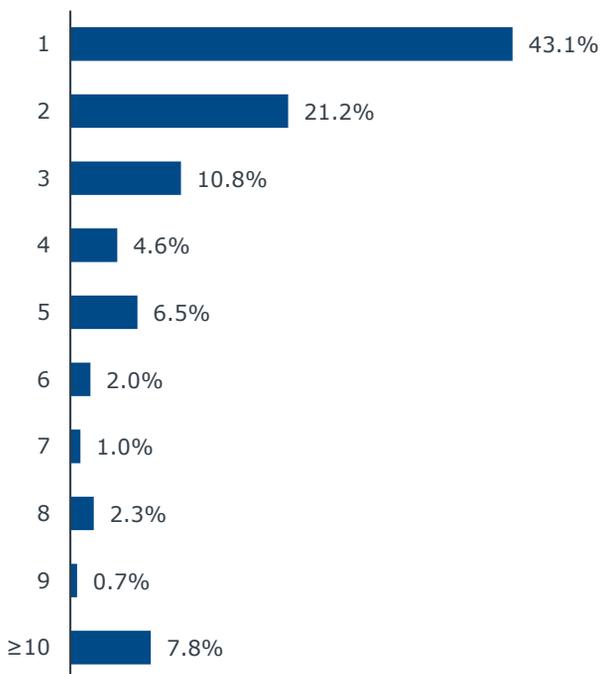
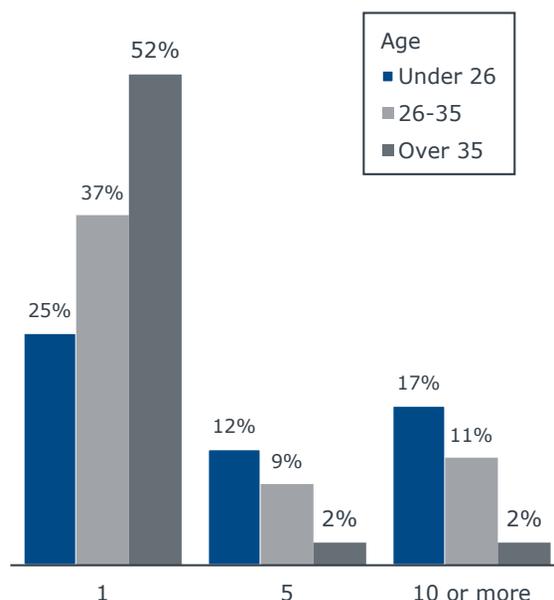


Figure 8: Younger Students Apply to More Schools Than Older Students Do

Q: To how many schools/programs did you apply?



Source: EAB research and analysis.

A Downward Trend in Test-Taking

A Large Share of Students Are Not Taking Graduate Admissions Tests

Our research indicated further pragmatism in adult learners' approach to graduate admission tests. Participants who were either planning to enroll or who were currently enrolled were asked which graduate admission tests they had taken, if any. Among the respondents, 40.5% had not taken a single test, and 11.3% indicated that they did not plan to take any tests.

By contrast, when EAB asked the same question of a comparable group of adult learners in a 2016 survey, only 20.5% of participants responded that they had not yet taken a graduate admission test, indicating a downward trend in test-taking over the past two years.

Figure 9: Four in Ten Adult Learners in 2018 Had Not Taken an Admission Test

Participants Who Planned to Enroll or Were Currently Enrolled

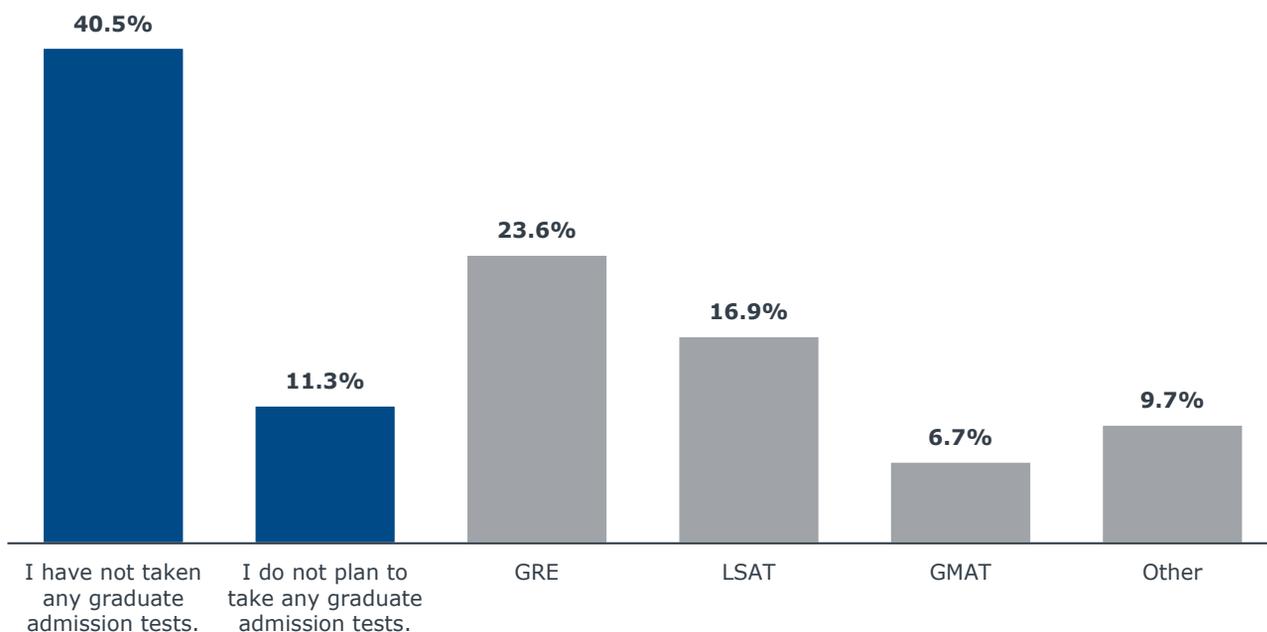
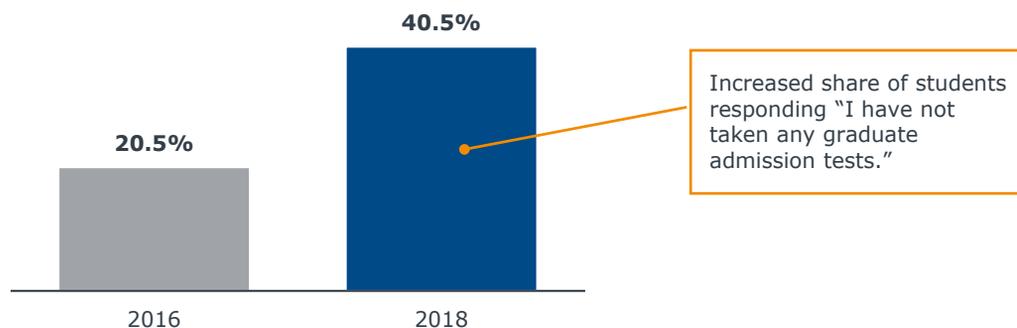


Figure 10: A Decrease in Test-Taking Since 2016

EAB 2016 Survey vs. EAB 2018 Survey



Approaching Tests with a Plan in Mind

Test-Takers Have Researched Options and Tend to Enroll Within One Year

Not only are adult learners limiting the number of tests they're taking, but the majority are taking tests only after they've identified their top institutions. Of the students who had taken an exam, 69.2% already knew where they would be applying before taking a graduate admission test.

Furthermore, about half of students enrolled in their current institution within six months of taking an exam, and over three-quarters enrolled within one year. These findings indicate that by the time adult learners took an exam, they had already researched options and formed a notion of where they might be applying. Past EAB research has shown that 1 in 5 adult learners changes the program he or she is considering during the recruitment process. Paired together, these findings indicate that, while adult learners may approach the application process with a plan, many will still change their mind, illustrating the importance of effective marketing at this stage.

Figure 11: Over 2/3 of Students Knew Where They Would Apply Before Taking a Test

Q: Did you already know where you would be applying before you took a graduate admission test?

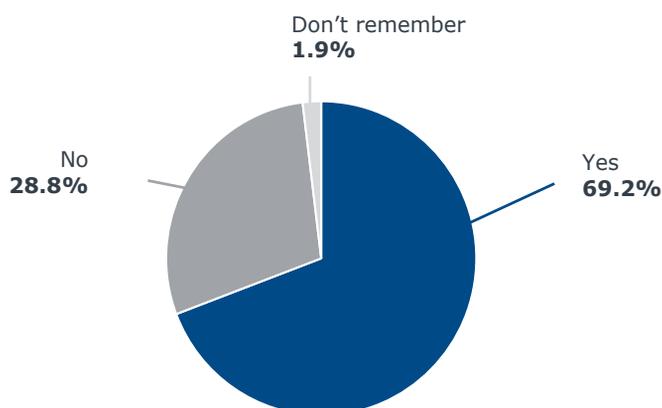
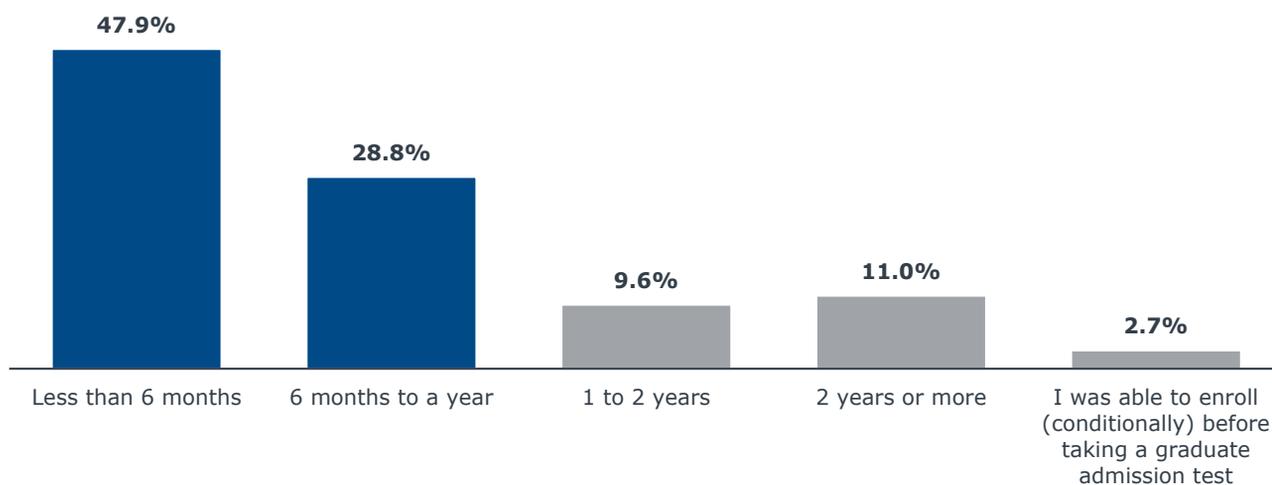


Figure 12: Over 75% of Students Enrolled Within One Year of Taking an Admission Test

Q: Approximately how long after you took your most recent graduate admission test did you enroll in a program?



Source: EAB research and analysis.

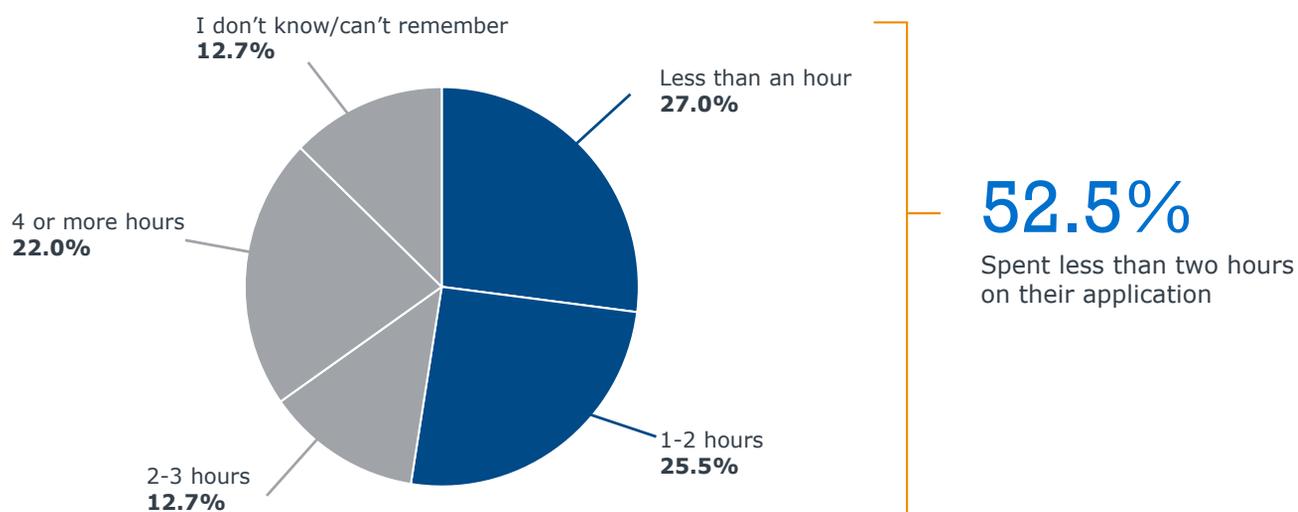
Valuing an Expedient Application Process

Adult Learners Seek Speed and Convenience When Applying

Adult learners' pragmatism in the application process is further evidenced in the amount of time students are spending on their applications. The majority of students (52.5%) spent less than two hours on their application. In addition, 52% of students responded that being able to complete applications on a mobile device was at least somewhat important to them. Both data points indicate that many adult learners require a quick and convenient application experience.

Figure 13: More Than Half of Students Complete Their Application in Less Than Two Hours

Q: How long did it take you to complete your application?



Seeking Mobile Options



52%

of students indicated that being able to complete applications on a mobile device was at least somewhat important



Adult Learners Require **Flexible Options**

THEME

4

Growth in Online Courses Reflects Need for Flexibility

Offering Competitive Choices to Meet Adult Learners' Needs

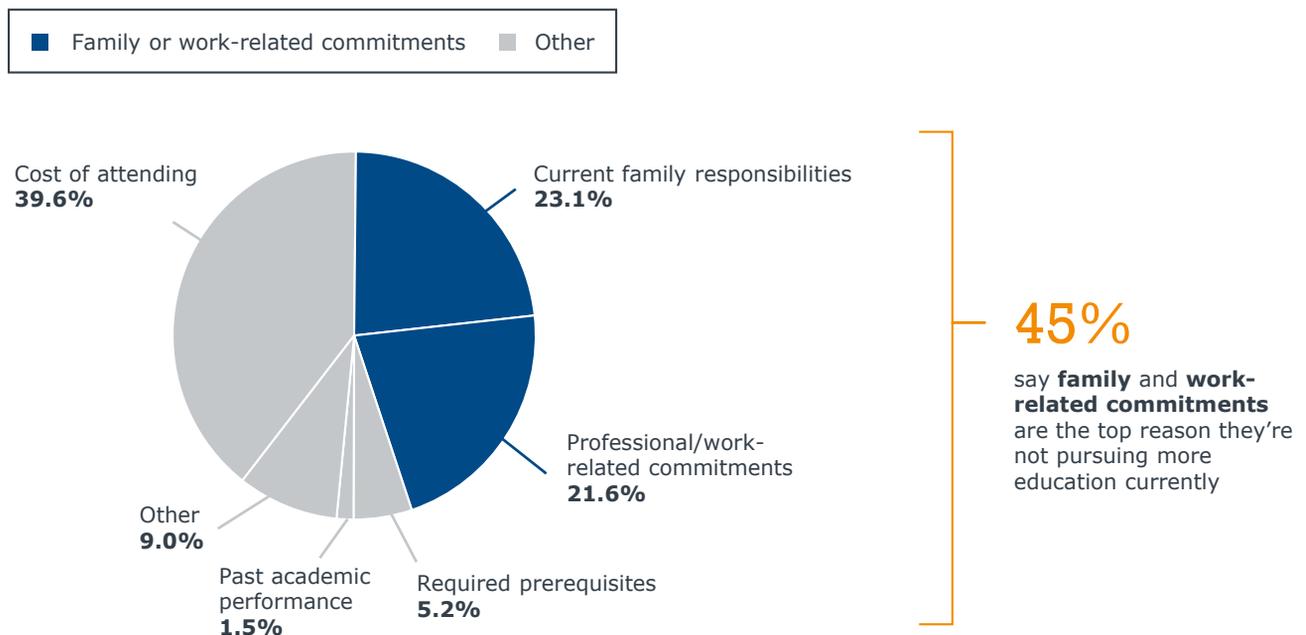
Between 2012 and 2017, the number of graduate students taking at least one distance-learning or online course increased by 46%. This growth is evidence of the appeal of flexible options for many adult learners. With varied program modalities, including online, part-time, and flexible options, adult learners can balance personal and career obligations while continuing to go to school. Our research indicates that, given the wide range of choices that are currently available to adult learners as they search for schools, flexible options appeal to a significant portion of prospects. In order to attract a wide swath of prospects and position themselves for growth in this competitive landscape, institutions need to offer flexible options that will fit with students' lifestyles.

Family and Work Commitments Prevent Prospects from Enrolling

Participants who indicated that they were thinking about going back to school but had no definite plans to do so within the next two years were asked for the primary reason they were not pursuing more education at this time. While the cost of attending was the top single reason named, family and work-related commitments were the primary barrier to enrollment for almost half of all interested prospects, with 23.1% of participants citing current family responsibilities and 21.6% naming professional or work-related commitments.

Figure 14: Almost Half of Interested Prospects Don't Pursue Further Education Due to Family and Work-Related Commitments

Q: What would you say is the primary reason you are not pursuing more education at this time?



Source: EAB research and analysis.

Accommodating Options Appeal to Adult Learners

Almost Half of Adult Learners Considered Online Options

Online and flexible options can offer adult learners a way to pursue their education while maintaining family and work obligations. Among the participants who were planning to enroll or who were currently enrolled, about half (46.6%) had considered online options. Older students were more likely to be considering online college options than were younger students, with 55.4% of participants above age 35 considering online options, compared to 20% of students under age 26 who were considering online programs.

Adult Learners Value Flexibility in Program Modality

Participants who were planning to enroll or who were currently enrolled were asked to indicate the importance of a variety of factors in their enrollment decision. A number of factors related to flexibility had mean scores of 3 or above, indicating that participants found them to be at least somewhat important in their enrollment decision. These factors included the total length of time required to complete a degree; the option for flexible, weekend, or part-time scheduling; and the availability of online or hybrid programs.

In line with the finding that older students were more likely to consider online college options, we also found that older students placed more importance on flexible scheduling, online courses, and joint/hybrid programs.

Figure 15: Flexibility and Online Options Are Important in Enrollment Decisions

Q: Indicate the importance of the following factors in your enrollment decision.

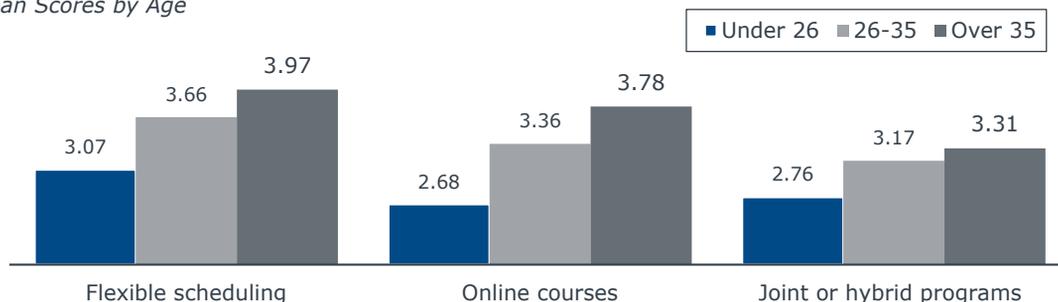
Factor	Mean
Length of program/time required for degree completion	3.79
Online support services (e.g., application for admission, payments, class registration)	3.78
Flexible scheduling (e.g., part-time, evening, weekend)	3.70
Online courses	3.43
Full-time program	3.25
Joint or hybrid programs (e.g., online and in class)	3.14
Designed for executives/professionals (e.g., weekend program)	3.09
Expedited program	3.06

1 in 2
prospects considered online options when researching programs

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

Figure 16: Older Adult Learners Value Flexibility More Than Younger Students Do

Mean Scores by Age



Source: EAB research and analysis.



Implications for **Recruitment Strategy**

Implications for Recruitment Strategy

Today's prospective adult learners are increasingly savvy and consumer-like. Our research suggests that the following strategies can help institutions better attract, communicate with, and enroll these students.

1 Ensure That Your Marketing Effectively Articulates Return on Education

Concerns about cost and value were among the most important factors in students' decisions about whether, and where, to enroll. To address prospects' reservations about their potential return on education, ensure that value messaging is thoroughly and deliberately incorporated into your multichannel messaging strategy. Create integrated, multichannel campaigns that highlight program value, including by discussing speed to degree, skills gained, and flexible modalities. For maximum effect, tailor value and cost messaging to prospects' mindsets and intents at each stage of the recruitment journey. Furthermore, ensure that your multichannel marketing develops awareness and affinity to better position conversations about spend on education.

2 Use Data to Better Understand Your Prospects and Tailor Marketing to Their Intent

Our research indicates that today's adult learners have heightened expectations for the recruitment "customer experience." We expect this trend to continue, meaning that sophisticated, student-centric marketing will become increasingly critical to enrollment strategy. To better meet the expectations of today's adult learners, start by developing robust, data-driven prospect personas that you can use to understand prospects' motivations, interests, and preferences, and then market to them accordingly. As you communicate with prospects, craft and deploy messages that are tailored to students' questions and intent at each stage of recruitment.

3 Reach Students Early with Awareness Campaigns and Multichannel Marketing

Our findings suggest that the share of prospects taking graduate admission tests has decreased and that, of the students who are taking exams, the majority have identified their top options by the time they complete the test. These findings highlight the importance of building awareness for your program and reaching students early in their consideration process. To maximize your pool of right-fit prospects, augment any test-taker lists with other methods of identifying and reaching prospects, including consumer data and digital ad targeting. To effectively engage students early, ensure that messaging is closely tied to students' known interests and motivations. In addition, make sure that your website is search engine-optimized so that prospects can discover and learn about your school when conducting their own research.

4 Craft Messaging That Conveys School-Life Balance

Our research demonstrates that adult learners typically have significant family or work commitments that necessitate flexible education options. To appeal to these prospects, institutions should ensure that marketing messaging effectively addresses concerns about school-life balance and highlights flexible options, including online and expedited courses of study. To further illustrate the potential for school-life balance, create campaigns that accurately reflect target prospects' interests and lifestyles. Craft imagery and text that incorporate their known preferences and reflect their hobbies, preferences, and lifestyles to foster an authentic connection with your school.

To learn how EAB can help you leverage these and other adult learner insights to meet your growth goals, **visit eab.com/ALR** or email jocelynpowers@eab.com.

About the Study

Overview of Study

EAB's Enrollment Services conducted a survey of current and prospective adult learners in fall 2018. The study investigated a variety of topics related to graduate, professional, and undergraduate degree programs and certificate programs. Topics explored included prospects' motivations for pursuing education further, sources used to gather information about programs, key decision criteria, preferred communication channels, and plans for financing education. The results reported include responses from 772 participants. In addition to the survey data, these findings reflect the insights from EAB research based on our partnership with 70+ graduate, continuing, and online programs.

Participant Profile

Gender	Percentage
Female	67.0%
Male	32.4%
Other	.6%

Age	Percentage
25 or under	13.9%
26-40	40.9%
41 or over	45.2%

Region	Percentage
Northeast	18.0%
South	32.5%
Midwest	25.0%
West	15.7%
Outside the United States	8.8%

Ethnicity	Percentage
African/African American/Black	18.4%
Asian (Central/South/East/Southeast) /Pacific Islander	6.0%
Hispanic or Latino	13.2%
Middle Easterner/West Asian	2.3%
Native American	2.3%
White/Caucasian	65.3%
Other	0.8%

Employment	Percentage
Employed full-time	55.5%
Employed part-time	18.5%
Not employed	26.0%

Education

- In terms of highest level of education completed, 4.0% had completed high school, 9.2% had completed some college, 10.% had completed an associate degree, 30.4% had completed a bachelor's degree, 10.9% had completed some graduate studies, 27.1% had completed a master's degree, 4.8% had completed a doctoral degree, and 3.5% had completed some other professional credential.
- In terms of plans to pursue education further, 45.5% were either considering enrolling or planning to enroll in a program, 35.5% were currently enrolled in a program, 2.0% were enrolled at one time but were no longer enrolled, and 17.1% did not plan to continue their education.
- The participants who planned to enroll or were currently enrolled were considering or pursuing the following degrees and programs:

Other master's degree (e.g., MA, MS, MFA): 30.6%
 Doctorate (e.g., PhD, EdD): 22.0%
 Bachelor's degree: 15.8%
 Law (e.g., MA, JD, LLM): 7.3%

Certificate: 6.0%
 Master's of Business Administration (MBA): 5.0%
 Medicine (e.g., MD, DDS, DPT): 4.0%
 Other: 9.4%



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from enrollment to graduation and beyond

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right-fit students

> Support and graduate
more students



> Prepare your institution
for the future

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served

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with us year after year,
reflecting the goals we
achieve together

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