



CARNEGIE CONFERENCE 2024

The State of Higher Education and the New Adult Learner

Jim Fong
Chief Research Officer
UPCEA



Introduction and Reflection



Generational Audit

Generation Z
1997 -2012



Millennials
1981-1996



Generation X
1965-1980



Baby Boomers
1946-1964

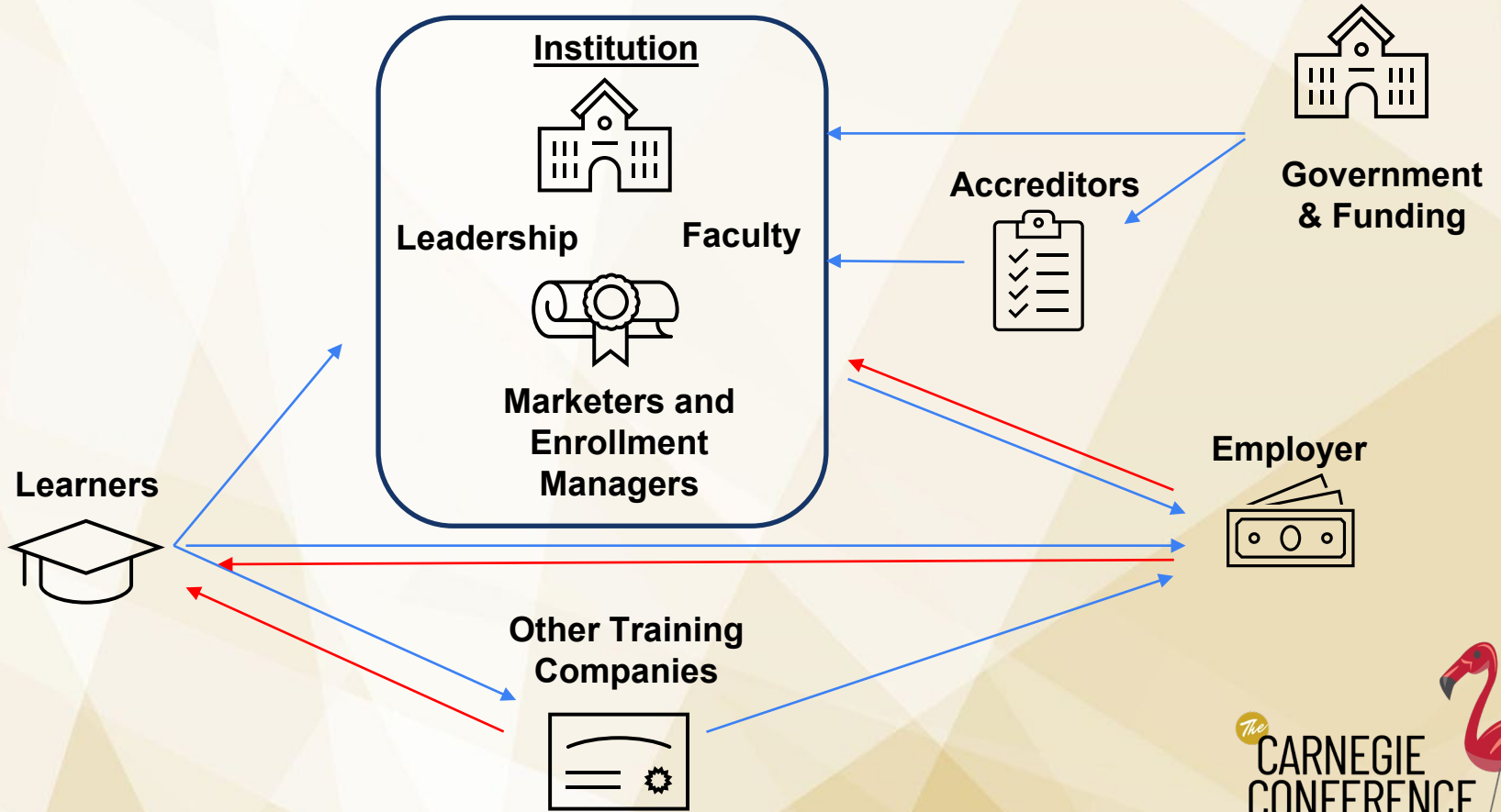


Agenda

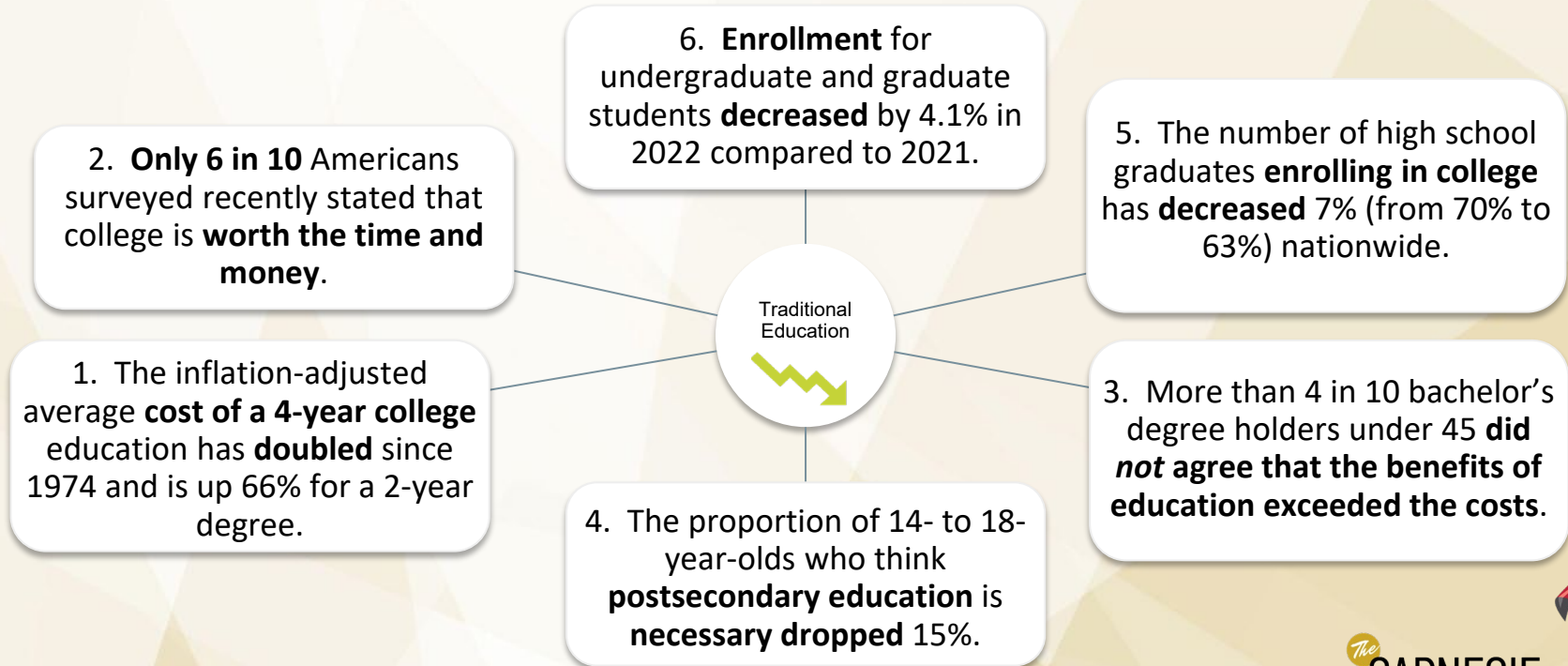
- A. Stakeholders
- B. Where Did We (Higher Education) Come From?
- C. Where are We at Today with Higher Education?
- D. Where are We Going?
- E. What Does it Mean for Marketers?
- F. How Can Marketers and Enrollment Managers Prepare?



Stakeholders



How Did We Get Here? #1: *We Let the Perception of Higher Education Decline*



(Hechinger Report; Inside Higher Ed)

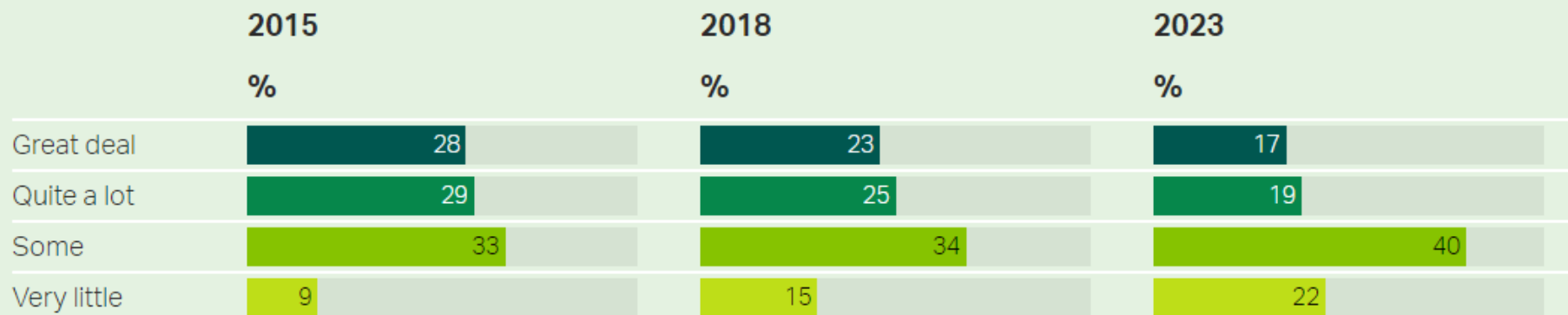
Source: <https://hechingerreport.org/how-higher-education-lost-its-shine/>

<https://www.insidehighered.com/views/2022/08/16/higher-ed-must-change-or-die-opinion#.YvuaxFJCI2Y.linkedin>



Americans' Confidence in Higher Education Continues to Fall

Now I am going to read you a list of institutions in American society. Please tell me how much confidence you, yourself, have in each one -- a great deal, quite a lot, some or very little. **Higher education**



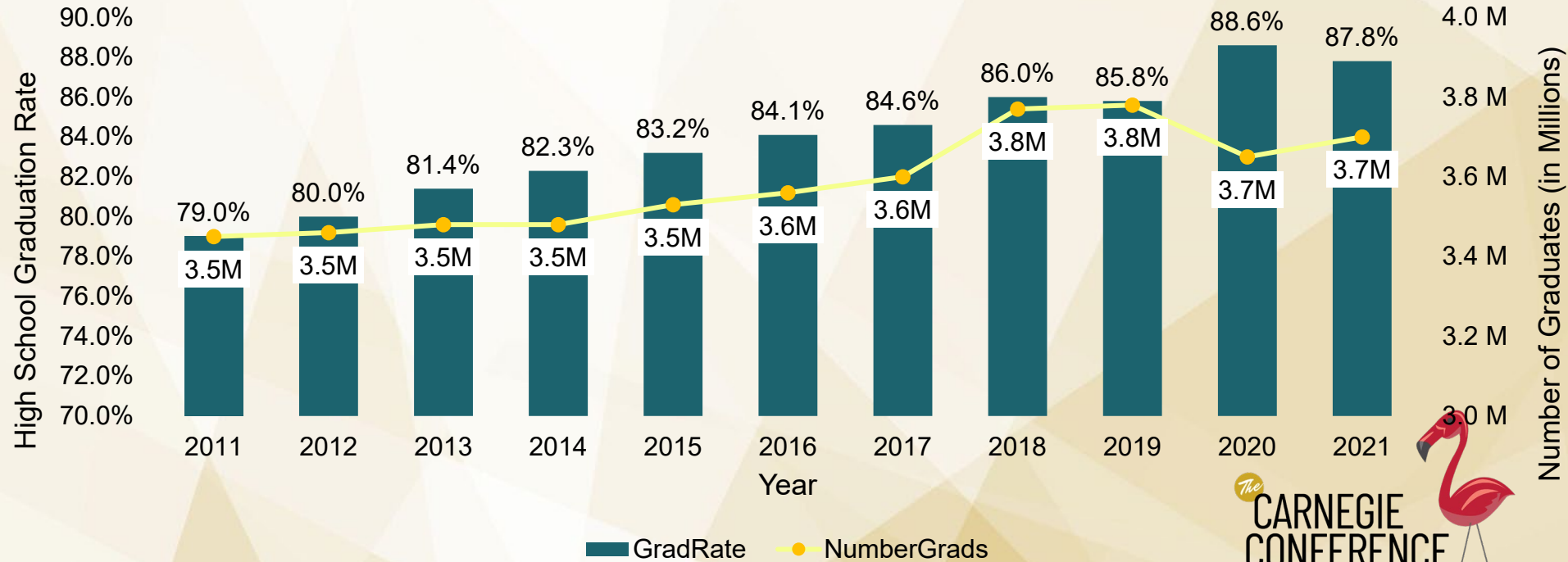
Those with no opinion are not shown.

[Get the data](#) • [Download image](#)

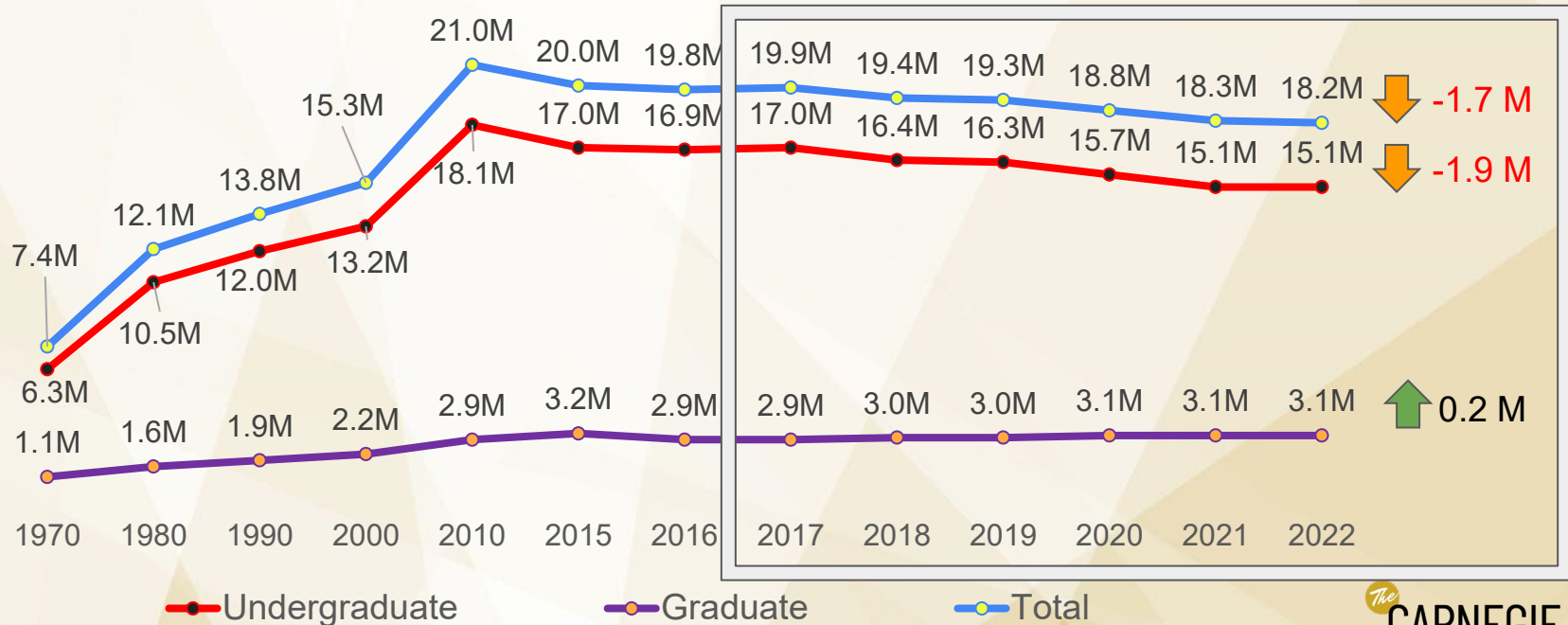
GALLUP

Strong high school graduation rates and numbers are not generating undergraduate enrollments at the same rate.

High School Graduation Rates and Numbers (in Millions) 2011-2021



How Did We Get Here? #2: College and University Leaders Refused to Lead into the Future



A Surge in Young Undergrads, Fully Online

Tens of thousands of 18- to 24-year-olds are now enrolling at Western Governors, Southern New Hampshire and other national online institutions. Does this represent a change in student behavior?

By Susan D'Agostino · Published October 14, 2022

Western Governors, traditional-aged student enrollments have more than doubled—from approximately 6,000 students in 2017 to 15,000 students in 2022. Like Southern New Hampshire, Western Governors' young, fully online student population rivals that of a traditional, midsize university, or several community colleges.

The Numbers

Big online universities experienced massive growth across the board during the pandemic. Southern New Hampshire enrollment grew from 135,000 students in March 2020 to 175,000 in 2022. At Western Governors University, enrollment in March 2020 was 4,300 students. By March 2022, enrollment had grown to 5,700 students. In the first semester of the pandemic, Southern New Hampshire enrolled approximately 5,000 fully online students who were under 24 years old. Today, that population has grown to approximately 43,750 students. The extra 10,000 students could, on their own, populate a midsize traditional university, or several small liberal arts colleges.

Western Governors University of Maryland Global Campus, an institution with a sizable concentration of students in the military, the population of fully online students under the age of 24 started off smaller than at its peer institutions, though it has increased by 33 percent in recent years, from nearly 4,300 students in 2017 to 5,700 students today.

“When we first started online years ago, we certainly didn't have anything like the number of young students,” LeBlanc said. At that time, “we routinely said that traditional-aged students really don't gravitate online.” “When we first started online years ago, we certainly didn't have anything like the number of young students,” LeBlanc said. At that time, “we routinely said that traditional-aged students really don't gravitate online.”



Where Are We Today?

The Demographic Cliff???



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



How Did the Demographic Cliff Happen?



Where Are We Today?

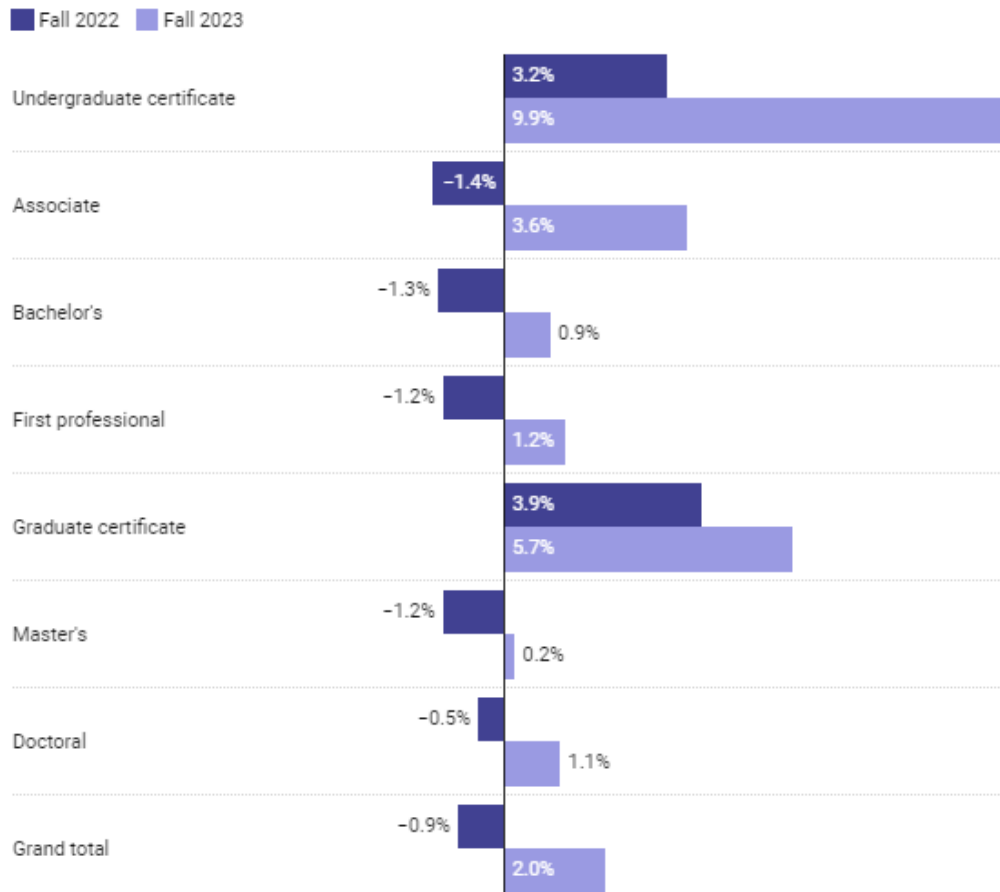


- **First-Time Student Enrollment Declined** 3.6% for Fall 2023
- Undergraduate Enrollment Rebounded During this Time, But Mostly Because of **Community College (+4.4%) and Certificate Growth**
- Credit Growth Was Also Fueled Disproportionately by **Students of Color.**
- Undergraduate Growth Was Also Fueled Disproportionately by **18-20 and 30+ Year-Olds, as well as by Females**

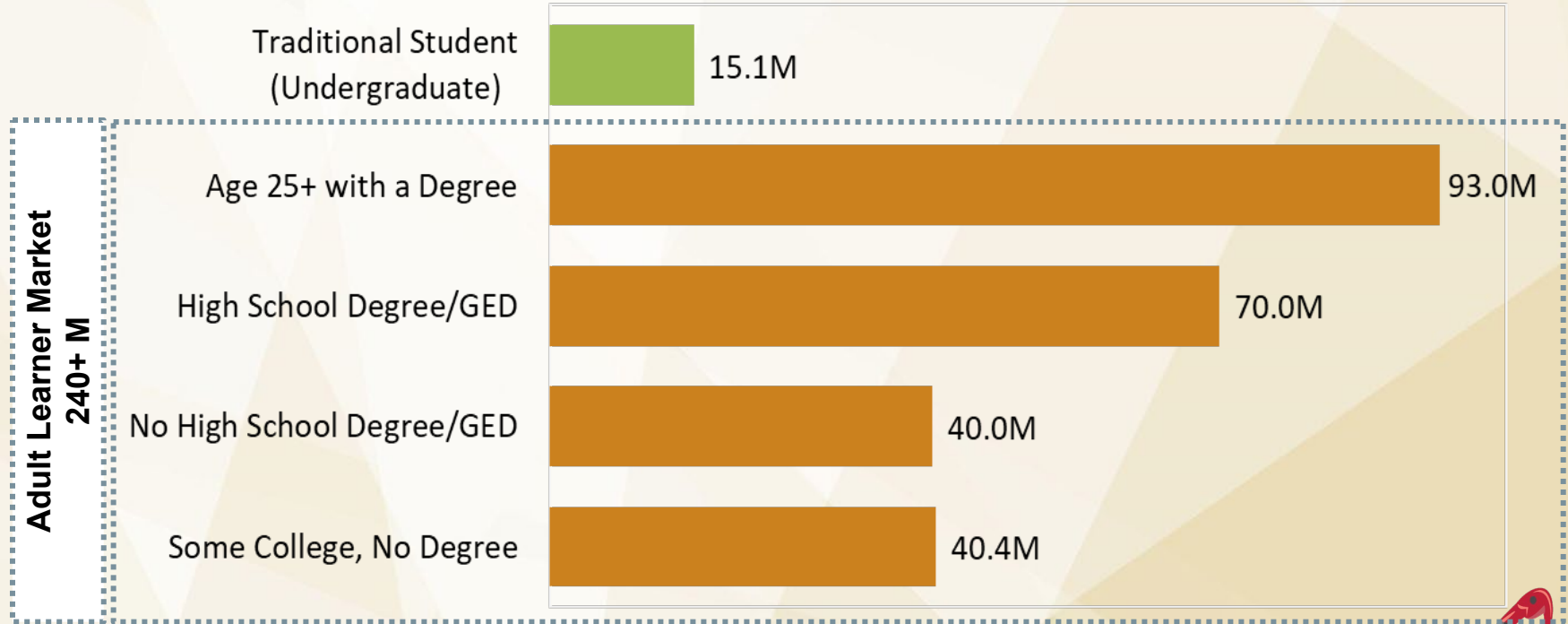
Source: National Student Clearinghouse. Stay Informed Report. October 2023.

Short-term credentials gained steam

Year-over-year percentage change in enrollment by credential type

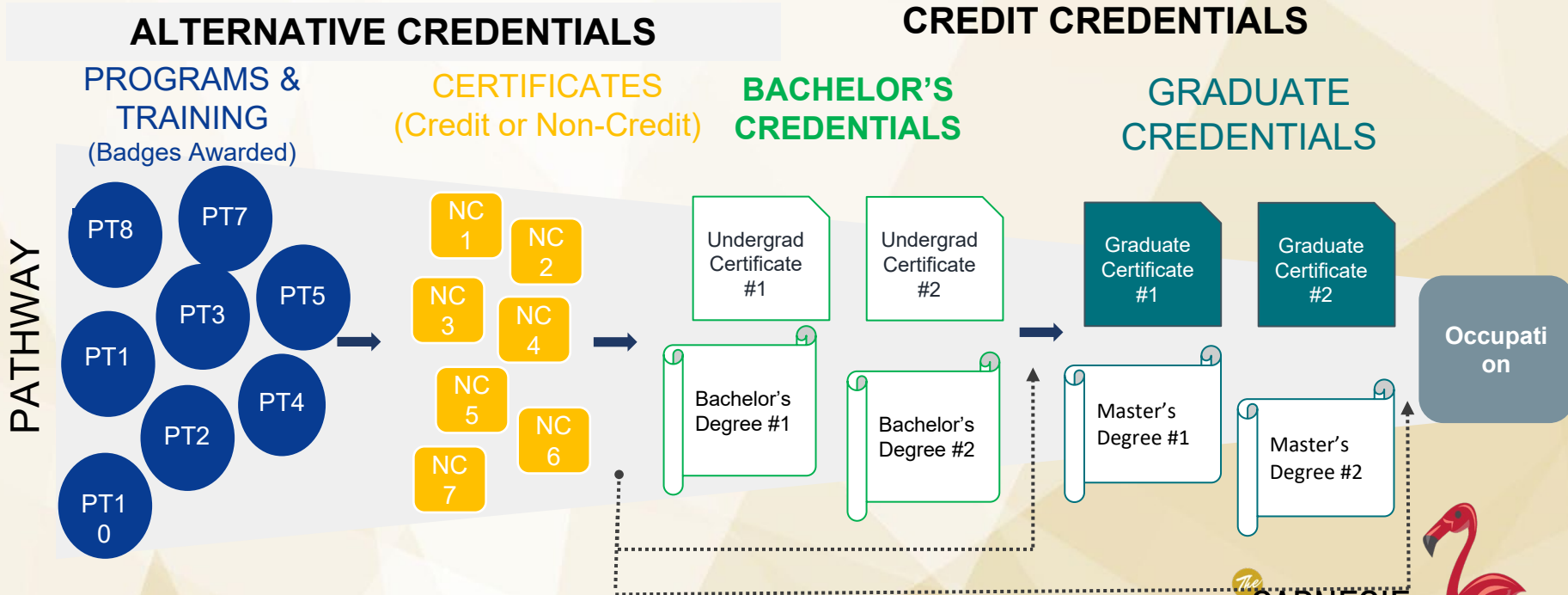


But There is Hope ...



Source: [National Student Clearinghouse](#)

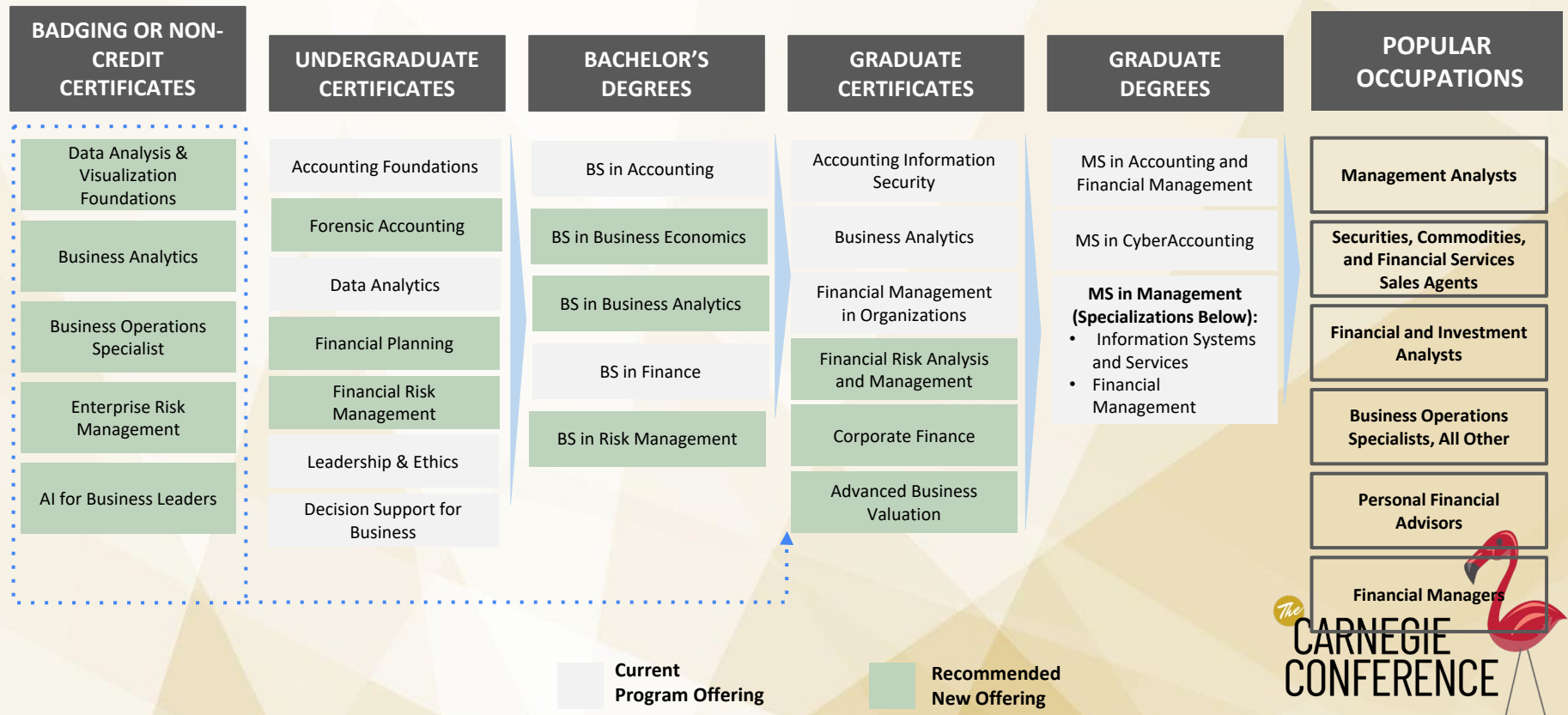
Ideal Stackable Pathway Map: Degree and Non-degree Credentials



Source: https://drive.google.com/file/d/1Q3P8b25PaHKmpd_pAFIkG-RB7mix9xWK/view?usp=sharing

Business Occupations: Educational Pathways & Program Opportunities (1)

The stackable credential pathway for high-ranking occupations highlights credit and non-credit programmatic opportunities.



LY ONLINE
LIBERTY UNIVERSITY

Programs About Admissions Tuition

Undergraduate Certificate in Criminal Justice

18 Credit Hours	.5 Years (Avg.)	Class Type 100% online, 8-week courses	Transfer Credits Transfer in up to 75% of the certificate total
Next Start Date May 15, 2023		Accreditation Liberty University is accredited by SACSCOC	

LY ONLINE
LIBERTY UNIVERSITY

Programs About Admissions Tuition

Home > Helms School of Government > Bachelor's Degrees > Online Criminal Justice Degree – Bachelor's

Online Criminal Justice Degree – Bachelor's

120 Credit Hours	3.5 Years (Avg.)	Class Type 100% online, 8-week courses	Next Start Date May 15, 2023
Transfer Credits Transfer in up to 75% of the degree total		Accreditation Liberty University is accredited by SACSCOC	

LY ONLINE
LIBERTY UNIVERSITY

Programs About Admissions Tuition

Graduate Certificate in Criminal Justice

9 Credit Hours	.5 Years (Avg.)	Class Type 100% online, 8-week courses	Transfer Credits Transfer in up to 50% of the certificate total
Next Start Date May 15, 2023		Accreditation Liberty University is accredited by SACSCOC	

LY ONLINE
LIBERTY UNIVERSITY

Programs About Admissions Tuition Military Current Students

Helms School of Government – Doctoral Degrees

Home > Helms School of Government > Helms School of Government – Doctoral Degrees

Online Degree Programs

- Undergraduate Certificates
- Graduate Certificates
- Associate Degrees
- Bachelor's Degrees
- Master's Degrees
- Doctoral Degrees

Tuition

- Student Financial Services
- Financial Check-in
- Payment Plans
- First Responder Discount
- Scholarship Opportunities

Resources

- Degree Completion Plans
- Course Guides
- Webinars
- Supplemental Instruction
- IT Helpdesk
- Academic Departments

Why Choose Liberty University for Your Online Doctoral Program?

As you grow in your profession, you may find that many fields require a doctoral degree for continued advancement. A doctoral degree demonstrates your high level of expertise in a specific area of study and is available to students who have already completed a master's degree. Having a doctorate will help you stand out from among your peers, especially in competitive career fields.

Liberty University is dedicated to helping you expand your knowledge and cultivate new career opportunities, so our variety of online doctoral degree programs are designed to not only add to your existing expertise but also help you become even more competitive in today's labor market.

Contact an **admissions counselor** today at (800) 424-9595 and see how an online doctorate degree from Liberty can give you the skills and knowledge you need to shape a better world.

[Apply Now](#)

[Request Info](#)

Helms School of Government Doctoral Degree Programs

- Criminal Justice (DCJ)
- Criminal Justice (PhD)
- Public Administration (DPA)
- Public Administration (PhD)

LY ONLINE
LIBERTY UNIVERSITY

Programs About Admissions Tuition

Home > Helms School of Government > Master's Degrees > Master of Science in Criminal Justice

Master of Science in Criminal Justice

36 Credit Hours	1.5 Years (Avg.)	Class Type 100% online, 8-week courses	Next Start Date May 15, 2023
Transfer Credits Transfer in up to 50% of the degree total		Accreditation Liberty University is accredited by SACSCOC	

LY ONLINE
LIBERTY UNIVERSITY

Programs About Admissions Tuition

Advanced Graduate Certificate in Criminal Justice

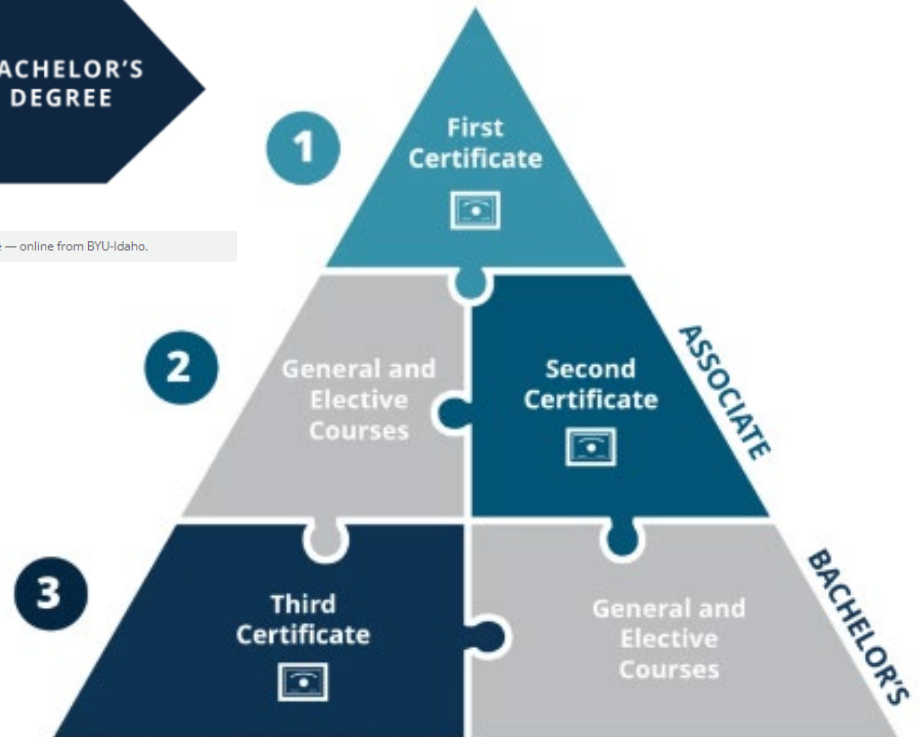
21 Credit Hours	1 Years (Avg.)	Class Type 100% online, 8-week courses	Transfer Credits Transfer in up to 50% of the certificate total
Next Start Date May 15, 2023		Accreditation Liberty University is accredited by SACSCOC	



The **certificates and degrees** offered online through **BYU-Pathway** will be granted from **Brigham Young University-Idaho**. However, all schools within the Church Educational System will help contribute individual courses and curriculum offered online through BYU-Pathway. Students who wish to attend the campuses of BYU, BYU-Idaho, BYU-Hawaii, or LDS Business College may apply separately to those institutions and must adhere to their individual admission standards.



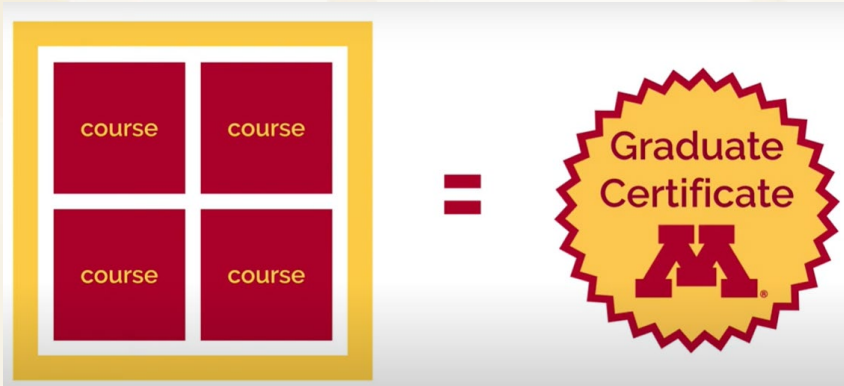
PathwayConnect opens the door to stackable degrees, which allows students to earn a certificate, associate degree, bachelor's degree — or all three — online from BYU-Idaho.



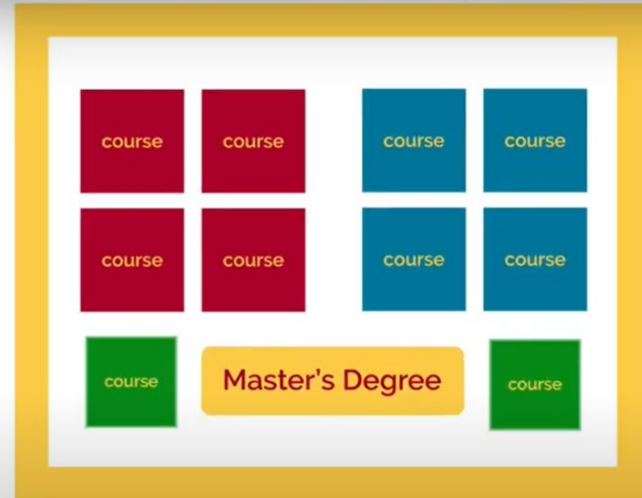


College of Continuing & Professional Studies

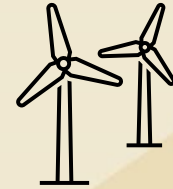
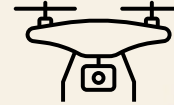
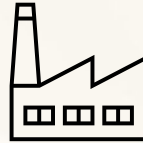
UNIVERSITY OF MINNESOTA



Stackable Credentials at CCAPS: Science Leadership



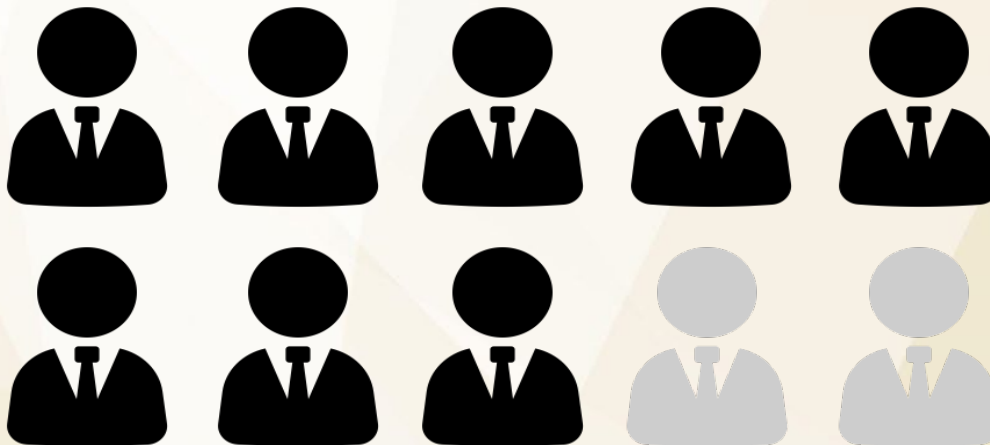
Employers Want It



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

Adult Learners Want It



Valentina



Amir



Elise



Michael

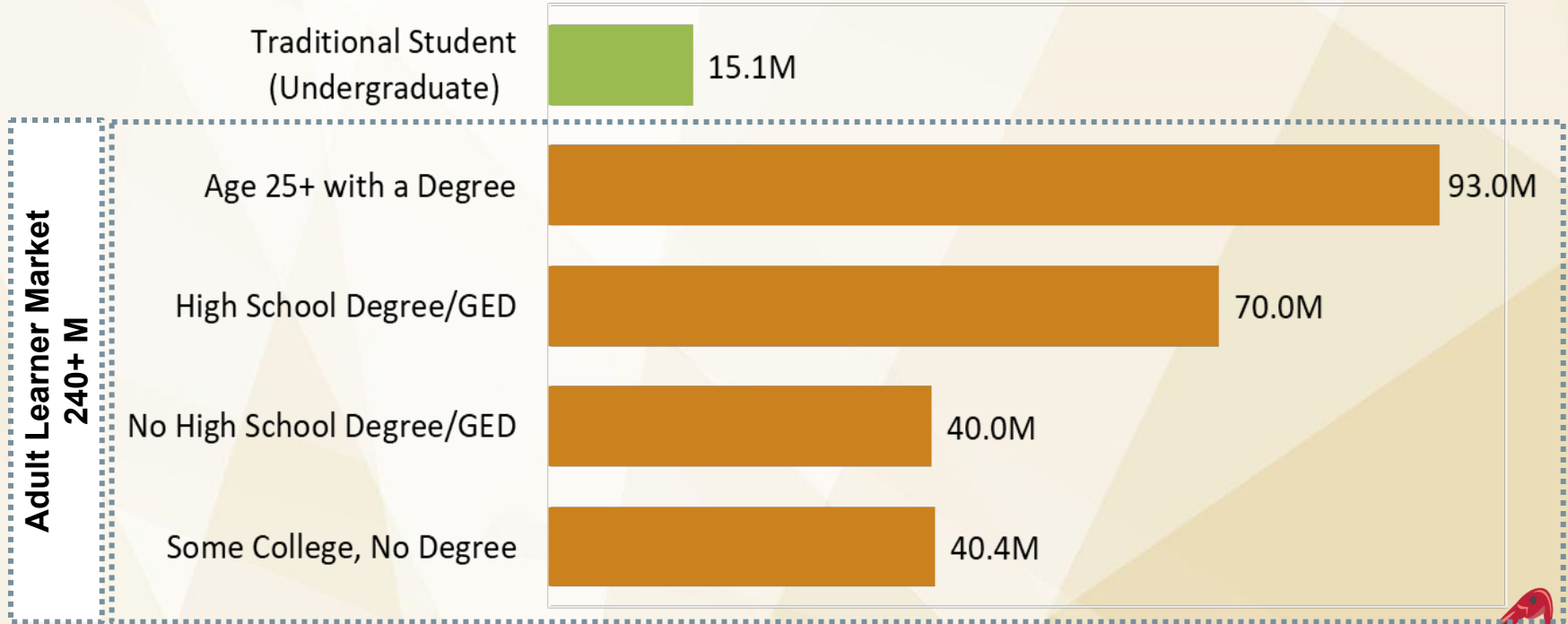


Jennifer



David

Remember this chart?



Source: [National Student Clearinghouse](#)

Some College, No Credential

Higher Education has Broken Their Trust

46%

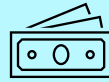
Agree that they're stuck in their career

29%

Extremely or very likely to pursue a degree completion program

17%
Difference

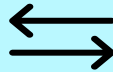
Important Factors: Cost, Speed & Communication



Cost 68%



Speed 56%



Credit Transfer 33%



Communication 33%

The Learner Desires Layers of Value

Credit for Prior Learning



78% increase interest

Stackable Microcredentials



74% increase interest

Methodology:

The survey took place in June 2023, with 1,106 qualified participants

Report Download

The CARNE CONFEI



Adult Learner Perspectives: A Summary of the UPCEA Regional Presentation on Adult Learners



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

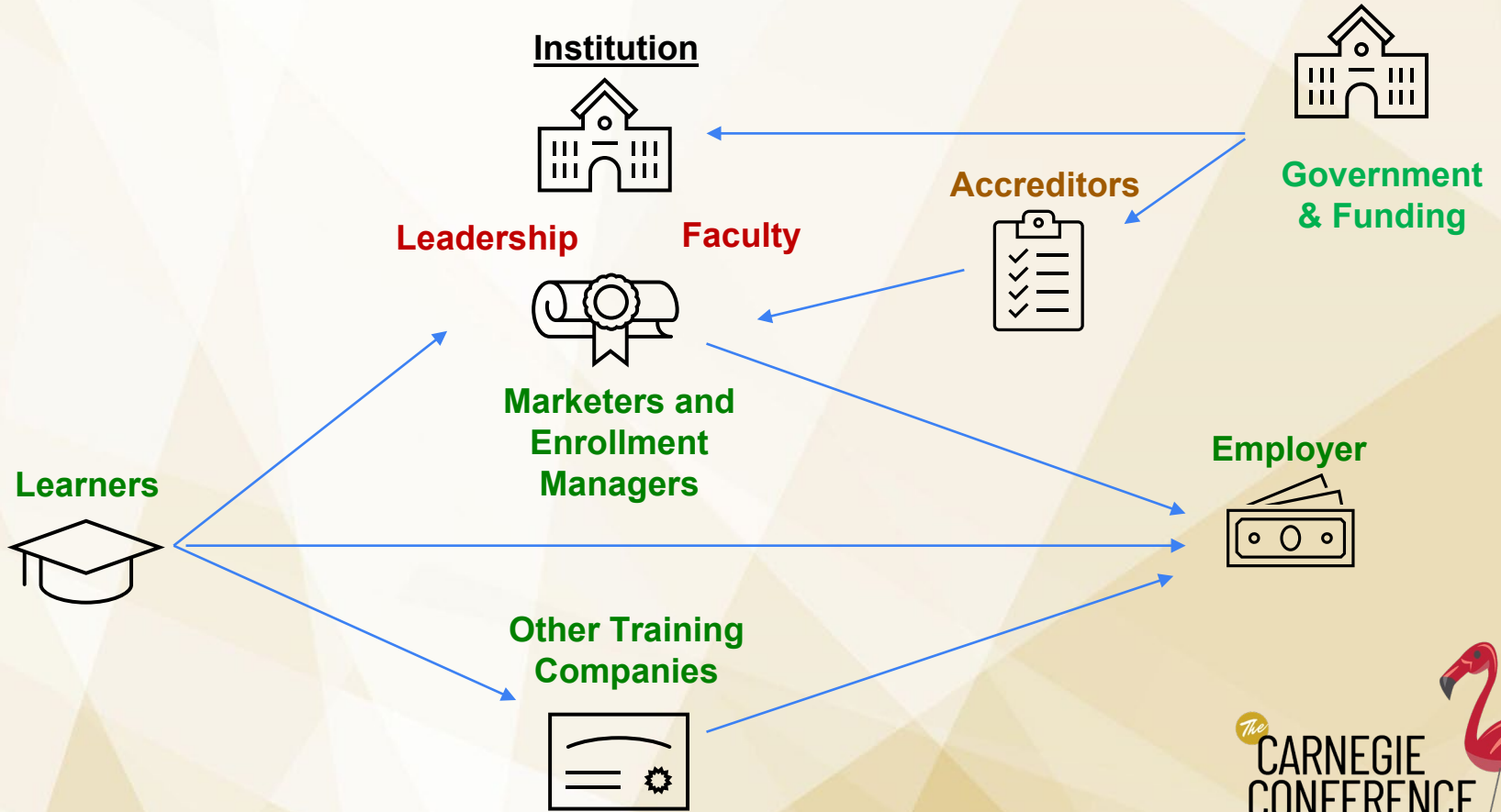


Valentina Amir Elise Michael Jennifer David

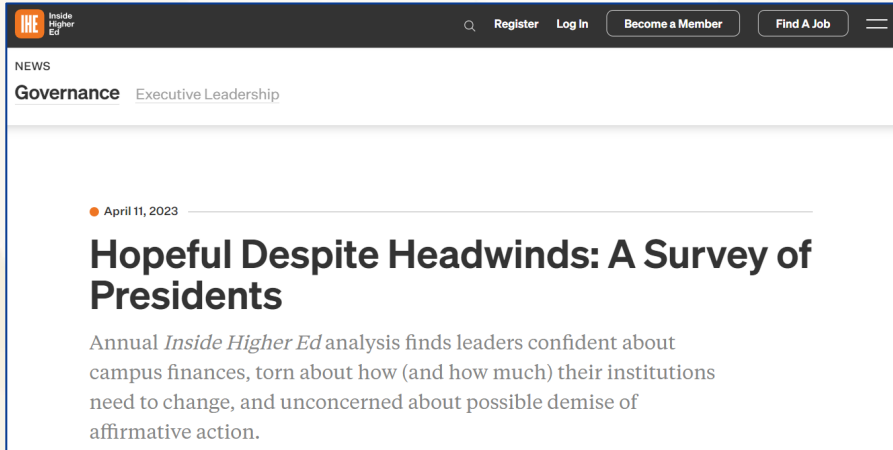
	Valentina	Amir	Elise	Michael	Jennifer	David
Colleges and Universities Can't Keep Up with the Economy (Strongly Agree/Agree)	61% (b)	53% (a)	54% (a)	63% (b)	47% (c)	57% (a)
Very Cost-Sensitive	59%	60%	53%	45%	53%	32%
Stackable Credentials Provide Greater Value to <u>me</u> (Strongly Agree/Agree)	66%	60%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



Stakeholders Revisited

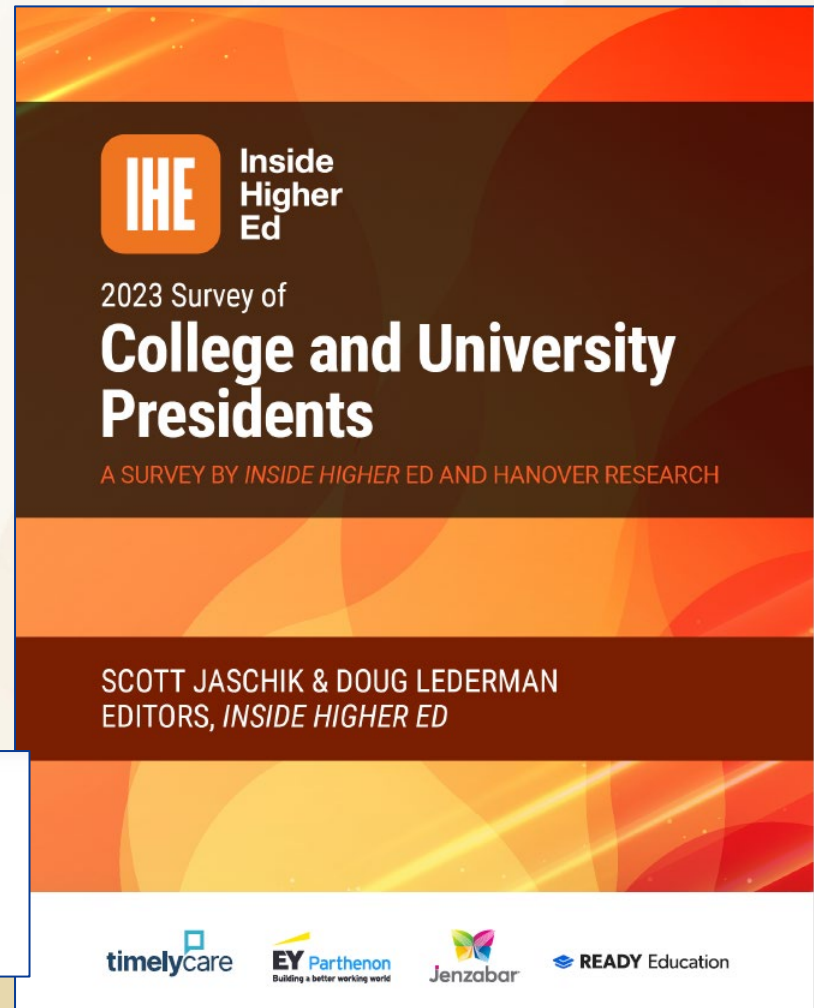


Do The Academics Want It?



The screenshot shows the top navigation bar of the Inside Higher Ed website with links for Register, Log In, Become a Member, and Find A Job. Below the navigation, the article is categorized under 'NEWS' and 'Governance' with a sub-link for 'Executive Leadership'. The article is dated April 11, 2023, and features the headline 'Hopeful Despite Headwinds: A Survey of Presidents'. The introductory text states: 'Annual *Inside Higher Ed* analysis finds leaders confident about campus finances, torn about how (and how much) their institutions need to change, and unconcerned about possible demise of affirmative action.'

Warning: The results of *Inside Higher Ed*'s new Survey of College and University Presidents, published today, may leave you with a serious case of whiplash.



The cover features the Inside Higher Ed logo and the title '2023 Survey of College and University Presidents'. Below the title, it reads 'A SURVEY BY INSIDE HIGHER ED AND HANOVER RESEARCH'. The editors are listed as 'SCOTT JASCHIK & DOUG LEDERMAN, EDITORS, INSIDE HIGHER ED'. At the bottom, logos for sponsors are displayed: **timelycare**, **EY Parthenon** (Building a better working world), **Jenzabar**, and **READY Education**.

It's Going to Happen ...



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

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

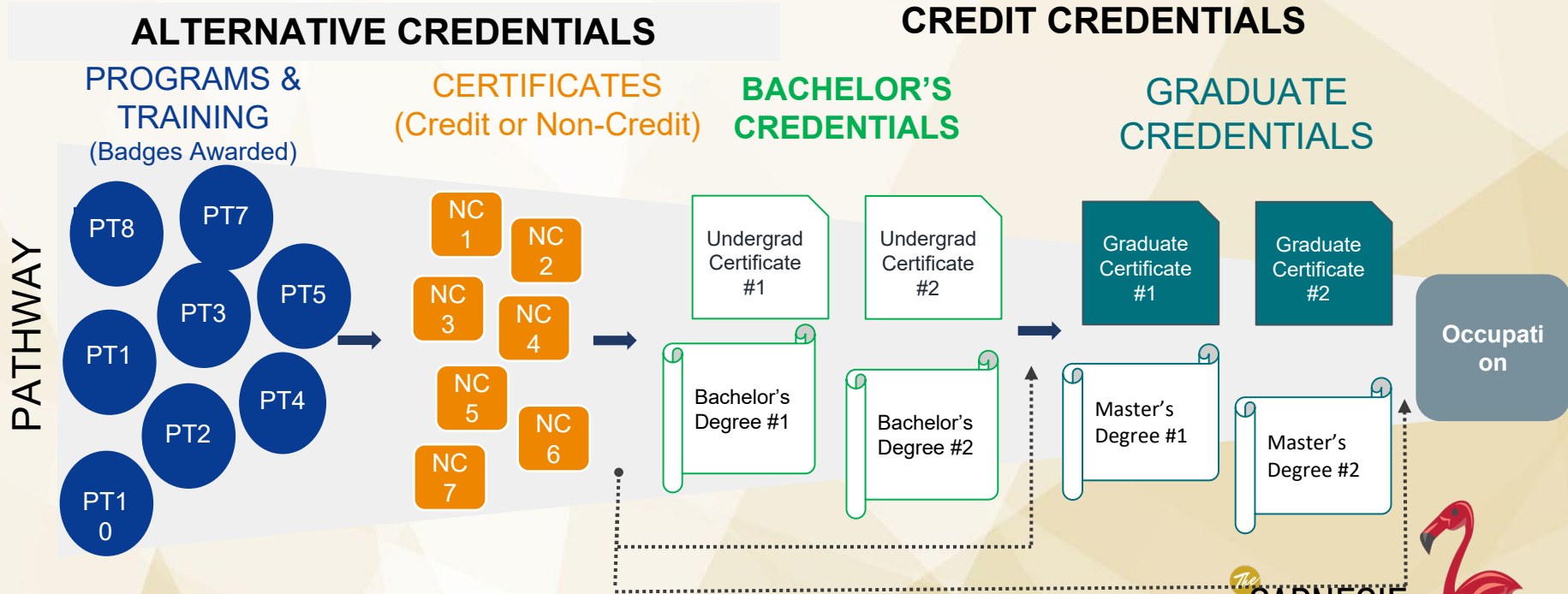
What Can You Do as Marketers and Enrollment Managers as You Move Forward



Preparing for Change. Anticipate Every Marketing “P”



Stackability and Digital Badges are New “P”roducts, But Can Be Present/Past Products “P”ackaged Different, as a “P”ricing Strategy

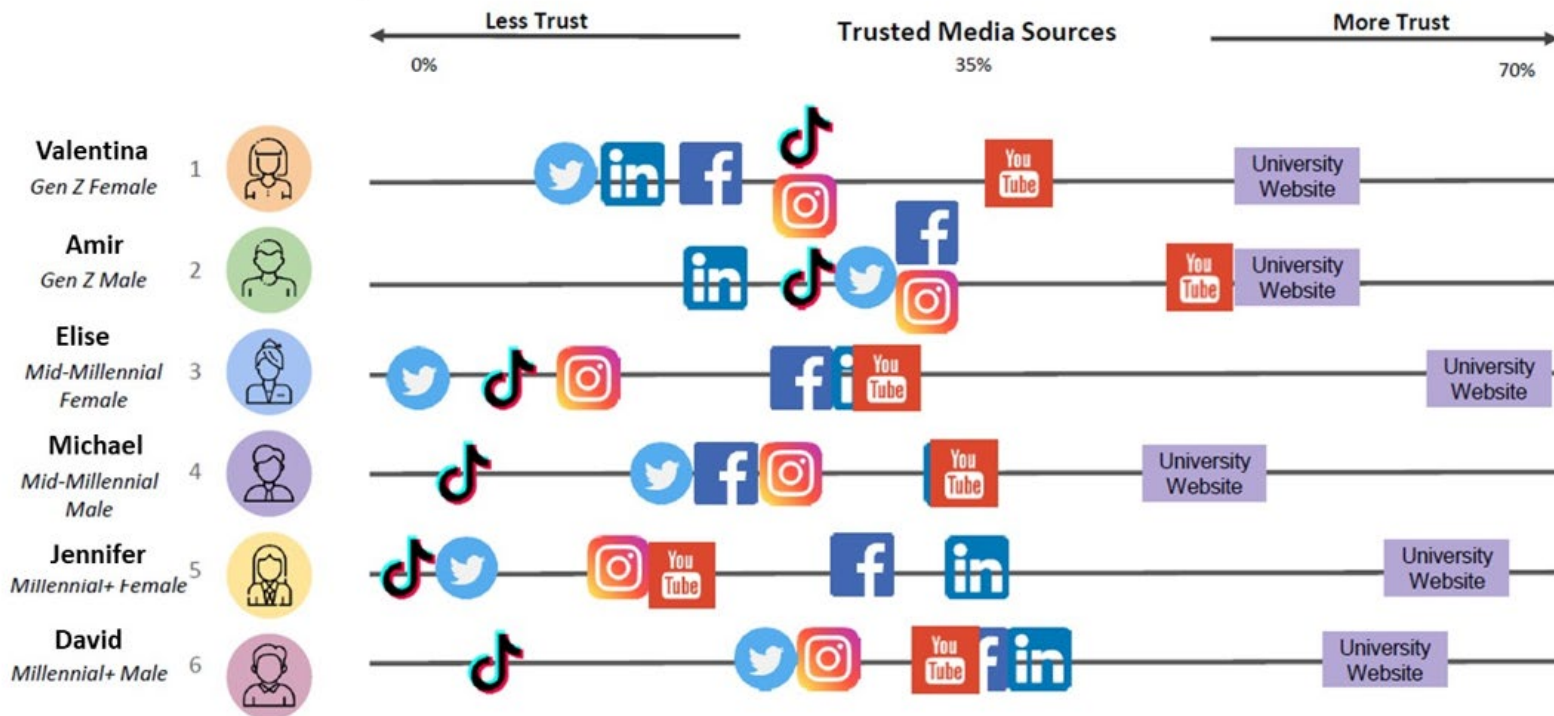


“P”romotion Needs to Be Based on the New Learner and Resourced Appropriately

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

UPCEA | SEARCH INFLUENCE

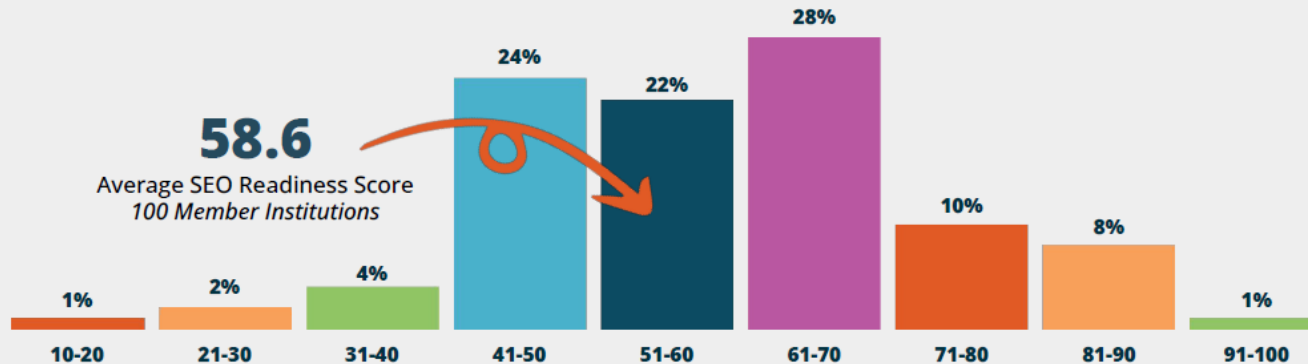
RELEASED: SPRING 2023

INFLUENCE

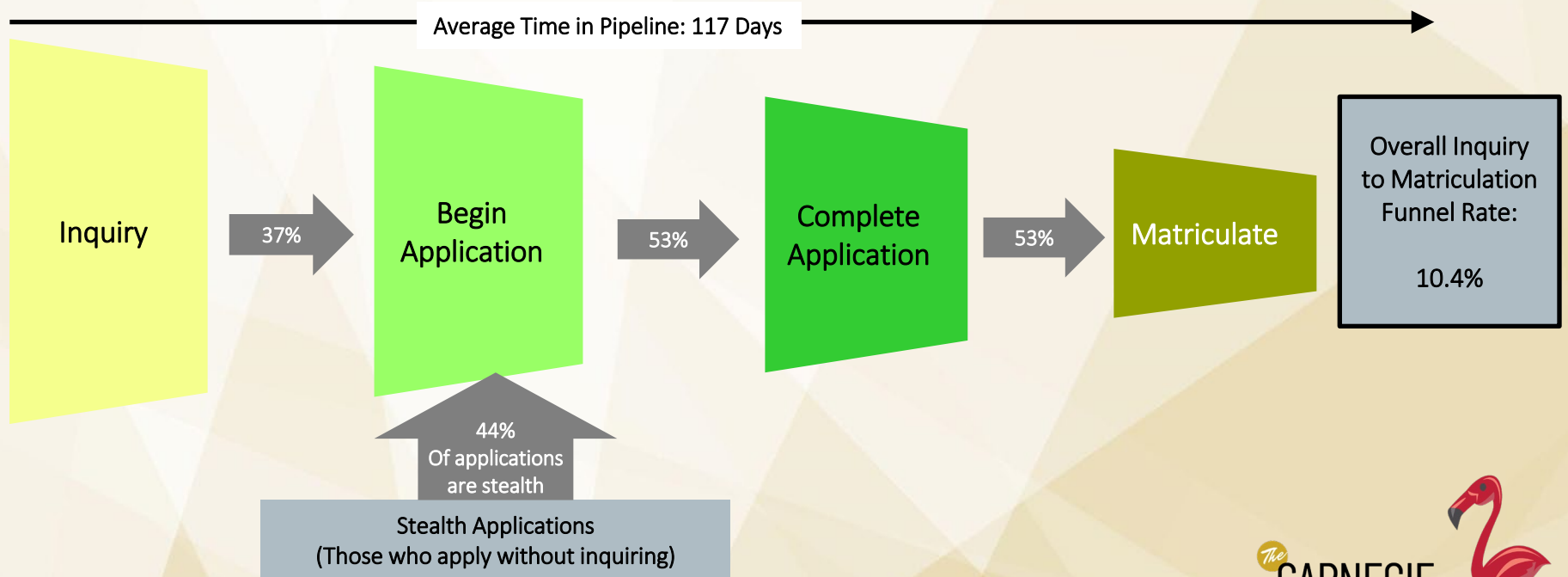
ed effort to
ed of critical data
points to advocate for additional resources and emphasize the importance of SEO to long-term program viability.

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 excelling score.

Figure 29: Overall Score (n=100)



The “P”rocess Needs to Change to Be User-Centric



Secret Shopper Analysis

March
13,
2023

200 Institutions
5 Inquiries Each
1,000 Total Inquiries

May 31,
2023

Average Response Time

7 Hours
22 Minutes

Median Response Time

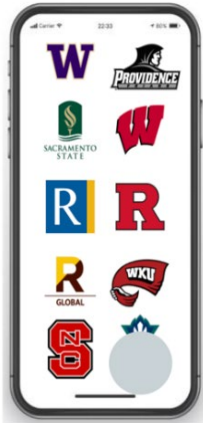
3 Hours
3 Minutes

Digital Inquiry Return Percentages

60% Received a Response
30% Received Same Day



Love/RFI



Phase 1

"Swipe" or Indicate interest in 10 individuals

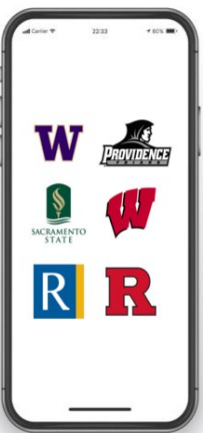
Select certain institutions based on website appearance, price, program offered, etc.



Phase 3

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

You tell the university about yourself



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 4

Congrats! It's a match!

Congratulations! Welcome!

Marketing and Enrollment “P”eople are Important

- **You Can Be the Hero:** Few Non-Marketers Really Understand Modern Marketing
- **You Need to Be Careful:** You Must Understand the Power Dynamics of Higher Education
- **You Can Use Analytics:** It will Help Communicate to Others and Balance the Power.
 - Do Not Weaponize It.
 - Share Marketing Progress.
 - Get Ahead of the Trends.
 - Educate the Stakeholders About What’s on the Horizon.
- **Manage Your Personal Brand During the Chaos.**



Q&A



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Chief Research Officer
UPCEA



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

