THINKING CAP™

The Six Personas of the New Learner:

Changing Motivations and Situations of the New Learner Landscape

UPCEA

Overview

In research conducted by the National Student Clearinghouse, the new learner market has shown that men and women do not see education in the same way. Evidence has shown that the education gender gap has been widening for the past 40 years, this becoming increasingly apparent in the last decade due to differences in motivation. There are 1.5 million fewer students in college and men account for 71% of the decline. The Wall Street Journal reported that Gen Z men choose not to seek higher education at a much higher rate than Gen Z women who now make up about 60% of those seeking higher level education. It is projected that in the next two years, women will outnumber men in college 2 to 1. The criteria for seeking higher education among all demographics has changed from a general assumption that it is necessary to have an advanced degree to now include factors like behavioral differences, career goals, tuition costs, and personal obligations.

Methodology

To better understand new learner motivations and influences, UPCEA and Thinking Cap Agency partnered to study the generational and demographic differences that are changing the behaviors of new learners. This paper focuses primarily on the way in which the new learner landscape has changed and how the digital economy affects these higher education attitudes. Using an internet panel, a survey targeted individuals between the ages of 18 and 45 who were not full-time students, and were somewhat, very, or extremely, interested in continuing their education/training. In total, 1,413 individuals participated in the study, of which 813 met all qualifications. The survey took place between April 30th and May 13th, 2021. Additional data can be found in the appendix.

https://epaper.thetimes.co.uk/the-times/20210908/282471416974690 Ibid https://www.wsj.com/articles/college-university-fall-higher-education-men-women-enrollment-admissions-back-to-school-11630948233?st=dlm62fggivdnryc&reflink=desktopwebshare_permalink Ibid

Executive Summary

The landscape of the economy has changed significantly over the last few decades with technology shaping the delivery of education, the workforce post-graduation, and the value of a degree. Adult learners who are subject to the effects and changes of the evolving digital world are an important section of the higher education ecosystem. This paper looks at the various motivations and drivers of various adult learner segments. Participants were asked about their motivations and reasons for continuing their education, training, and acquiring new skills as well as how schools can best interact with them when communicating these new higher ed opportunities. UPCEA and Thinking Cap Agency partnered to identify the gaps and opportunity areas which institutions can engage and interact with new learners.

The adult learner has changed and continues to evolve. The new adult learner can be challenging as consumers of products and services, including education, but their complexity can provide many opportunities as well. There are also many faces or segments of the adult learner population. To best represent and understand the generational and demographic differences of the respondents, six personas were analyzed and summarized to best represent the new adult learner. These were utilized to demonstrate how generational and gender markers influence the behaviors, motivations, and preferences of new learners.

What motivates new learners to seek higher education?

Almost 50% of respondents were extremely (27%) or very interested (22%) in continuing their education, receiving additional training, or gaining additional skills. The 23 to 29 age group had the highest interest with interest decreasing as age increased. Looking at their initial reasoning for continuing their education, the most cited were to improve their salary (58%), a personal goal (52%), and career advancement (44%).

Different learner personas have varying responsibilities that may change their willingness and motivations to return to higher education.

Cost of program was seen as the most important factor when making a decision about continuing their education for Mid-Millennials and Older-Millennials (47%), while Generation Z/Young Millennials prioritize career advancement (43%). This may signal a difference in their financial dependence and ambition from older age groups. The two most commonly cited sources of funding for new learners were scholarships and grants (51%) and loans (38%).

How can we capture a learner's attention?

Respondents of all ages most often cited that the most important sources for gathering information about a potential program are friends and family, internet searches, and college or university websites and staff. Overall, 61% said that a college or university website is the most trusted media source when considering a continuing education or training program, although younger generations gravitated more toward a diverse mix of traditional and social media.

The generational differences between the youngest age group and older Millennials shows that as age decreases, new learners become more comfortable and flexible with their modes of information sourcing.

Gen Z/Young Millennial new learners on average spent the most time on social media (3+ hours) and felt very comfortable with online videos (65%). Content marketing on social media is particularly important for Gen Z as they access information across multiple platforms whereas older Millennials spend the least time on social media and are more comfortable with online sourcing.

How do we keep them engaged?

Overall, learners preferred to engage with institutions through email (58%), then through in-person meetings (49%), and a mobile site (39%). The younger demographic prefers in-person engagement and was least likely to cite email whereas those older prefer to engage with schools through email when researching schools or programs. Fifty to sixty percent of all respondents said they would prefer to engage through email, followed by in-person meetings.

The importance of engaging with schools through email increased as age increased, while the importance of in-person meetings decreased. Forty-four percent said they would prefer to engage with a school of interest once a week. The second most popular preference was once a month across all age groups.

How do they value their education?

When asked about how they value their education, over three quarters of respondents agree (42%) or strongly agree (36%) that pursuing higher education provides a positive return on investment. This was consistent across all age ranges.

However, reflecting on how prepared they feel for the post-graduation economy, many agree (32%) or strongly agree (23%) that the economy is moving at a faster rate than colleges and universities can update and offer degrees.

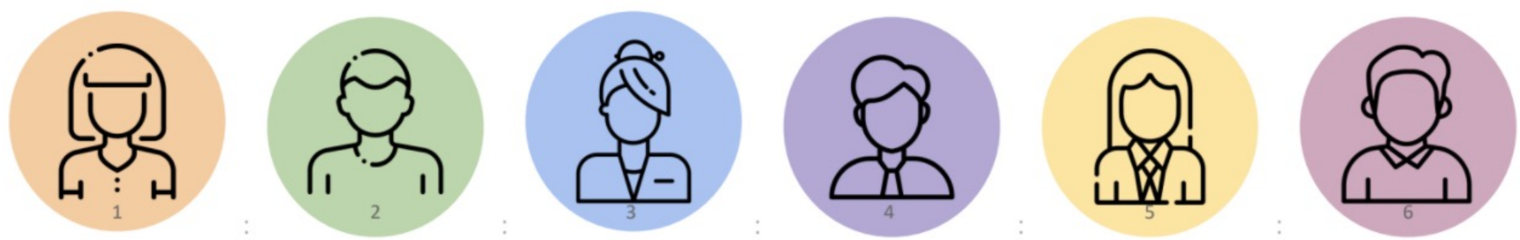
Respondents who said they were extremely or very prepared for the new economy most often cited that they feel prepared/have a positive outlook and that it is important to plan for technology to continue to drive economic growth and reshape the workforce.

With this in mind, institutions must look at the mode and content of their higher education delivery in order to equip new learners for dealing with the changing landscape.

New Learner Segments

To best represent and understand the generational and demographic differences of survey respondents, six personas were created and tracked to present six segments. These were utilized to demonstrate how generational and gender markers influence the behaviors, motivations, and preferences of new learners.

New Learner Personas



	Kaylie (23) *Gen Z/Young M Female*	**Mateo (19)** *Gen Z/Young M Male*	**Carla (28)** *Mid-Millennial Female*	**Chris (31)** *Mid-Millennial Male*	**Shauna (42)** *Millennial+ Female*	**Phil (37)** *Millennial+ Male*
Highest Education	Associates Degree	Didn't complete college	Graduate Degree	High School/GED	Bachelor's Degree	Bachelor's Degree
Employment	Full-time front-desk rep at a hotel	Part-time customer service rep at a retail store	Team manager in a large telecom firm	Between career paths, seeking employment	Sales rep at a large pharma company	Government contractor
Favorite Brand	Kaylie loves shopping at Zara for her clothes	Mateo is an avid buyer of Nike products	Carla uses Twitter often to keep up to date with news and trends	Chris browses YouTube often in his down time	Shauna loves using Facebook to hear about her friends' lives	Phil enjoys buying and selling collectibles on EBay
Motivation for New Learners	Kaylie wants to become the manager of her hotel location.	Mateo wants to enter the full-time job market.	Carla wants to advance her career to be a senior director.	Chris is interested in a new role and is seeking out higher salary opportunities.	Shauna in obtaining a higher degree to advance her career.	Phil wants to learn additional skills and business acumen to launch his EBay resale business.

Respondents were divided into three generational segments: Generation Z/Young Millennials, age range 18-26 (34%); Mid-Millennial, age range 27-34 (26%); and Older Millennial/Young Gen X, age range 35-45 (40%). The gender breakdown was 62% female, 37% male, and 1% gender-variant, non-conforming, non-binary, or prefer not to say.

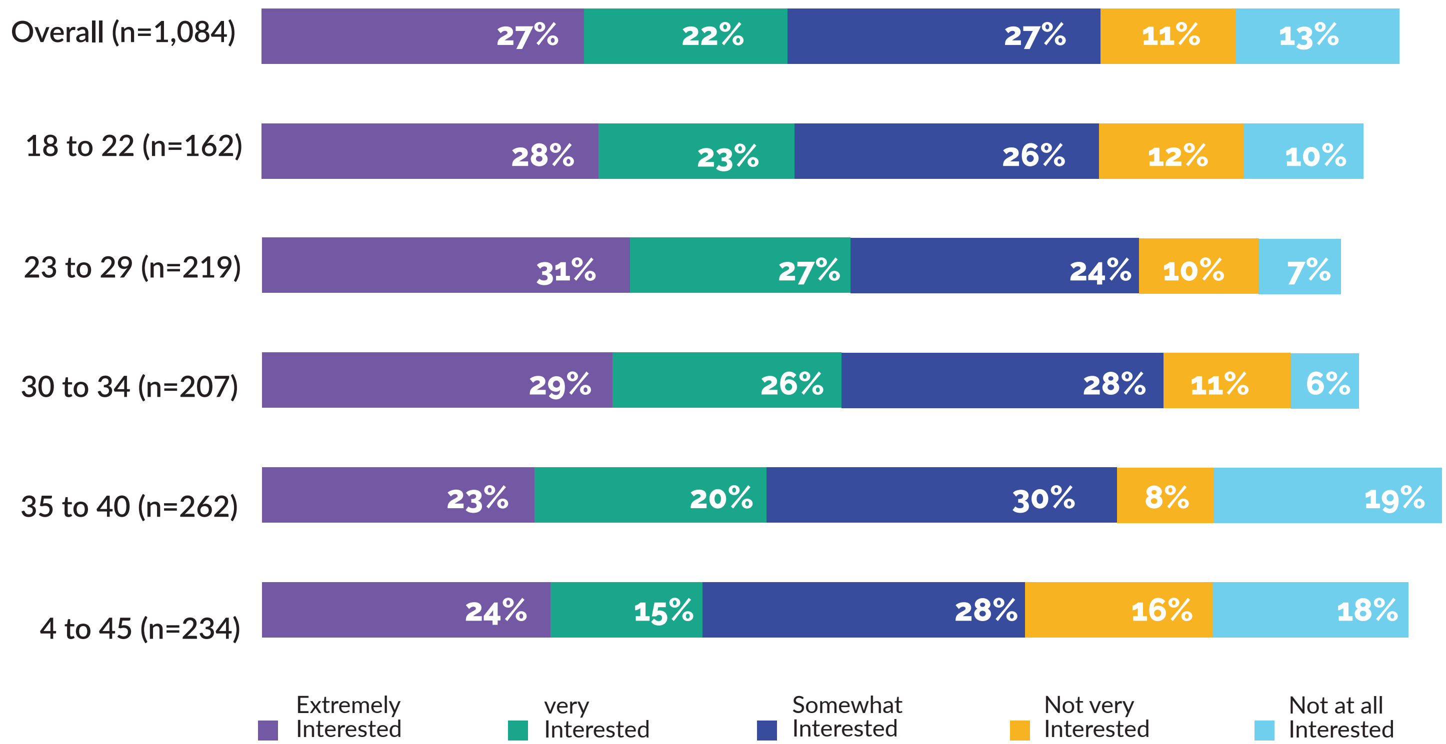
Detailed Findings

What Motivates a New Learner Seeking Out Higher Education?

In order to understand how to best appeal to new learners in this evolving economy, it is important to look at their motivations and how they differ across demographics and generations. Each generation has a different ambition and driver behind its decision to continue education, with varying thresholds of financial need, outside commitments, and future goals that drive their motivations to continue their learning.

Interest in Personal Advancement through Education, Training, or Skills

How interested are you in continuing education, receiving additional training, or gaining additional skills?



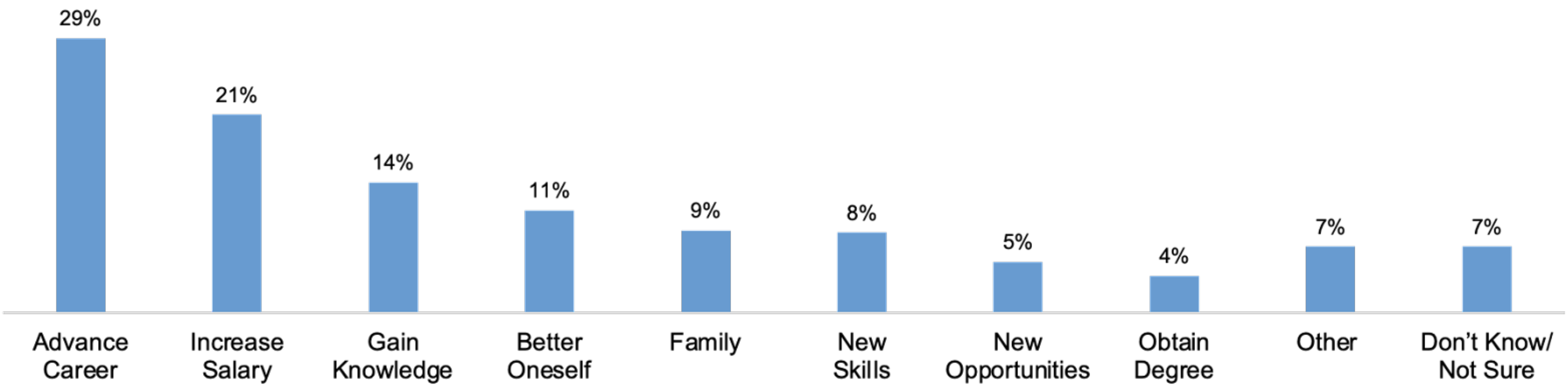
KEY INSIGHT

Almost half of respondents were extremely or very interested in continuing their education. The younger age group had the highest interest with decreasing interest as age increased.

Almost 50% of respondents were extremely (27%) or very interested (22%) in continuing their education, receiving additional training, or gaining additional skills. Those who were not very or not at all interested were terminated from the study. As age increased, the percentage of respondents who were extremely or very interested in personal advancement decreased.

Motivation for Seeking Additional Education or Training

What is your main motivation for seeking additional education training? (n=813)

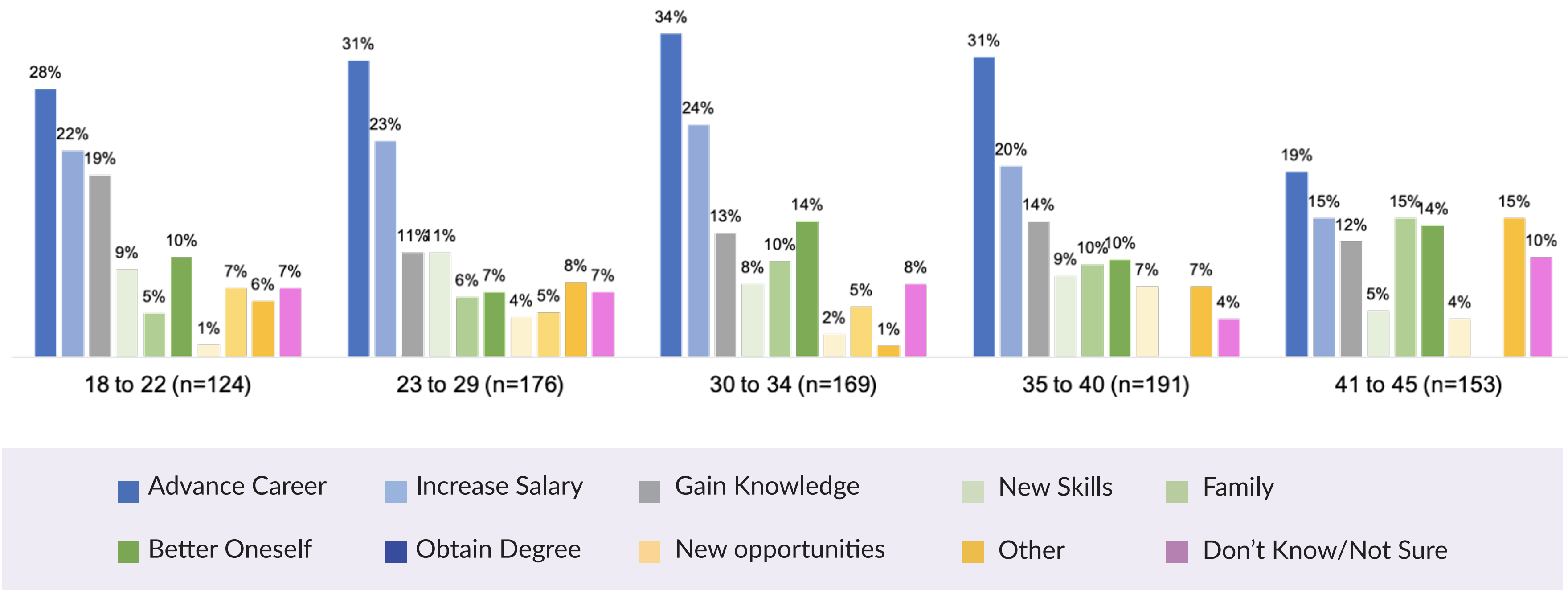


KEY INSIGHT

Respondents' main motivation for seeking additional education or training was most often to advance their career or increase their salary. Career advancement was less important to the youngest and oldest respondents.
Respondents' main motivation in continuing their education, receiving additional training, or gaining additional skills was to advance their career (29%) or increase their salary (21%). Multiple responses were allowed.

Motivation for Seeking Additional Education or Training

What is your main motivation for seeking additional education training?

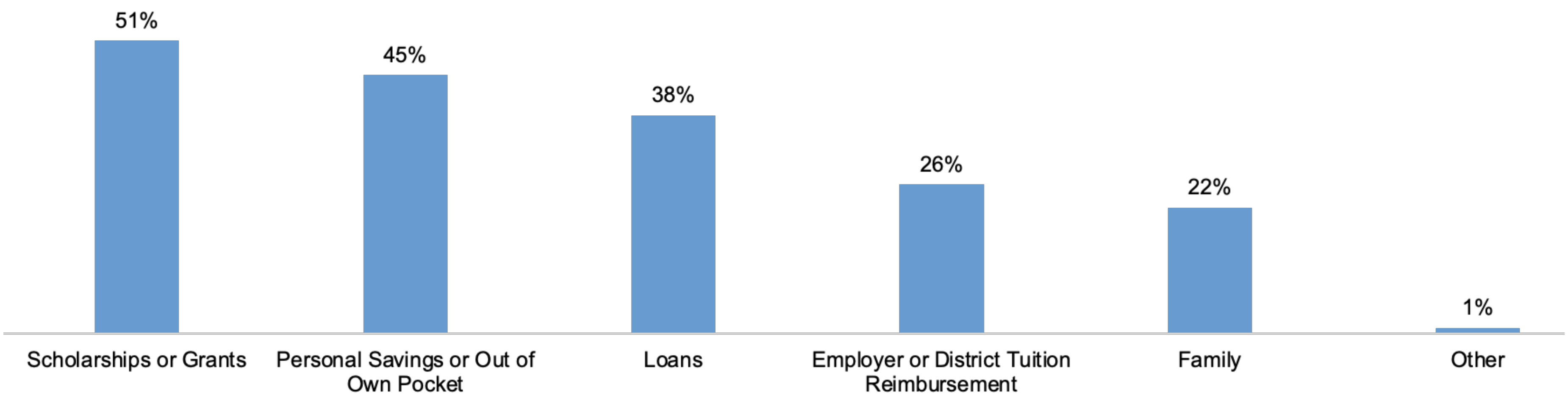


KEY INSIGHT

Thirty to thirty-four-year-olds were the most likely to say their main motivation for seeking additional education or training was career advancement which was less important to the youngest (18 to 22) and the oldest (41 to 45).

Sources for Funding Education

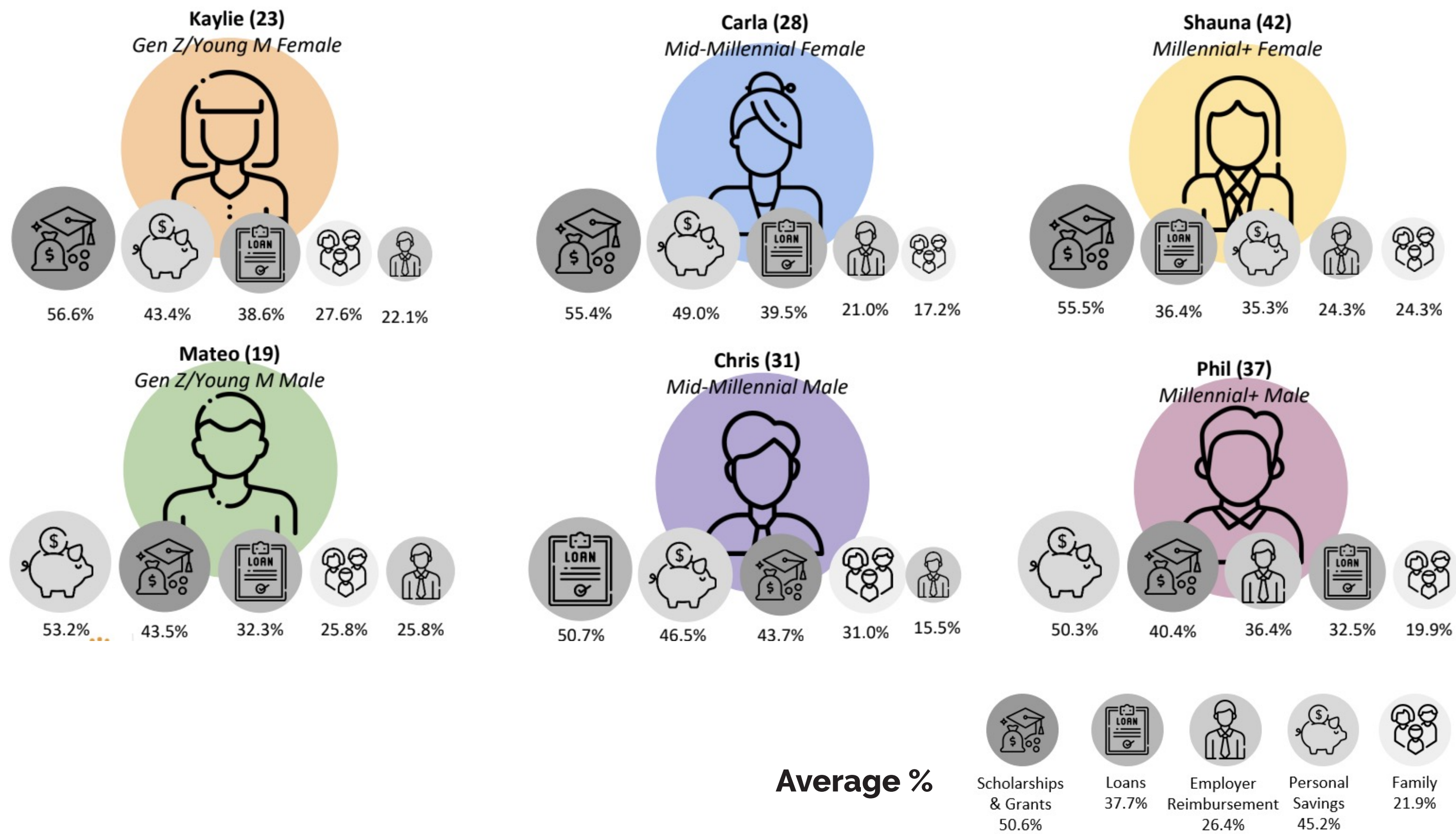
How are you currently or might you fund your future education? Please select all that apply. (n=770)



KEY INSIGHT

The most common sources for funding current or future education was scholarships or grants, followed by personal savings or out of their own pocket. Over half of respondents (51%) said they are currently funding or may fund their future education through scholarships or grants, while 45% said personal savings or out of their own pocket, and 38% said loans.

Sources for Funding Education - By Persona



KEY INSIGHT

Across all personas, the most commonly cited sources for funding were scholarships and grants (50.6%) followed by personal savings (45.2%) and loans (37.7%). Each new learner persona had varying responses to their most commonly cited source of funding, but scholarships and grants as well as personal savings were consistently cited in the top three sources.

How can we capture a learner's attention?

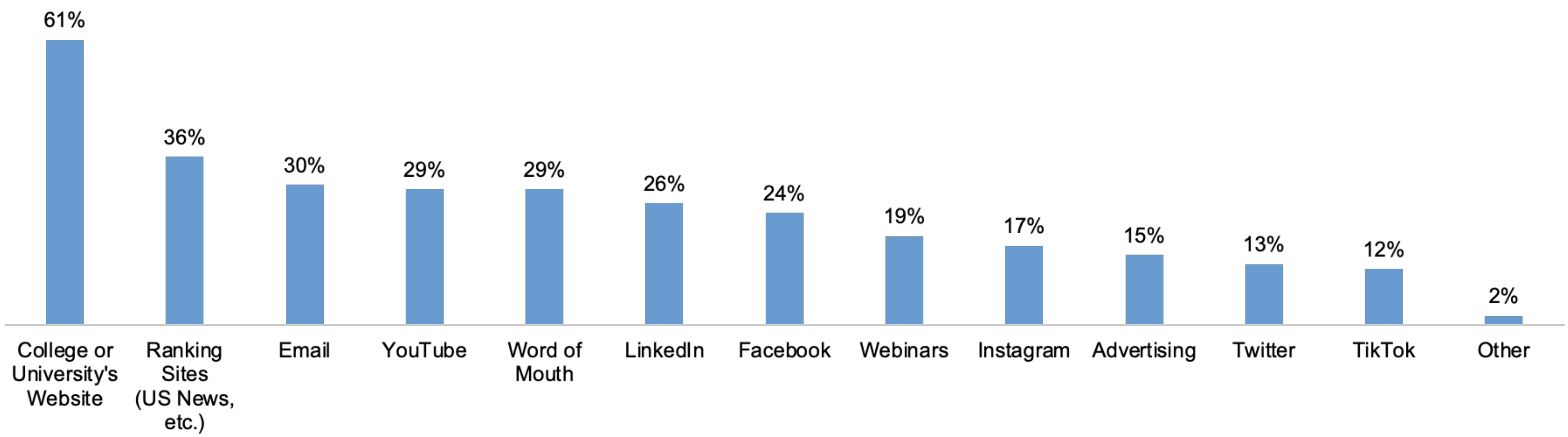
It's important for institutions to identify and understand learners' varying motivations in order to determine how to market and target their messaging. The sources trusted and most utilized by new learners change with age and demographics. Institutions can then plan and prepare for the messaging and medium that suits their audience best.

A college or university website was identified as the most trusted media source when considering a continuing education or training program by 61% of respondents. Other sources which were rated lower included ranking sites (36%) and email (30%).

Trusted Media Sources

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

Please select all that apply. (n=800)



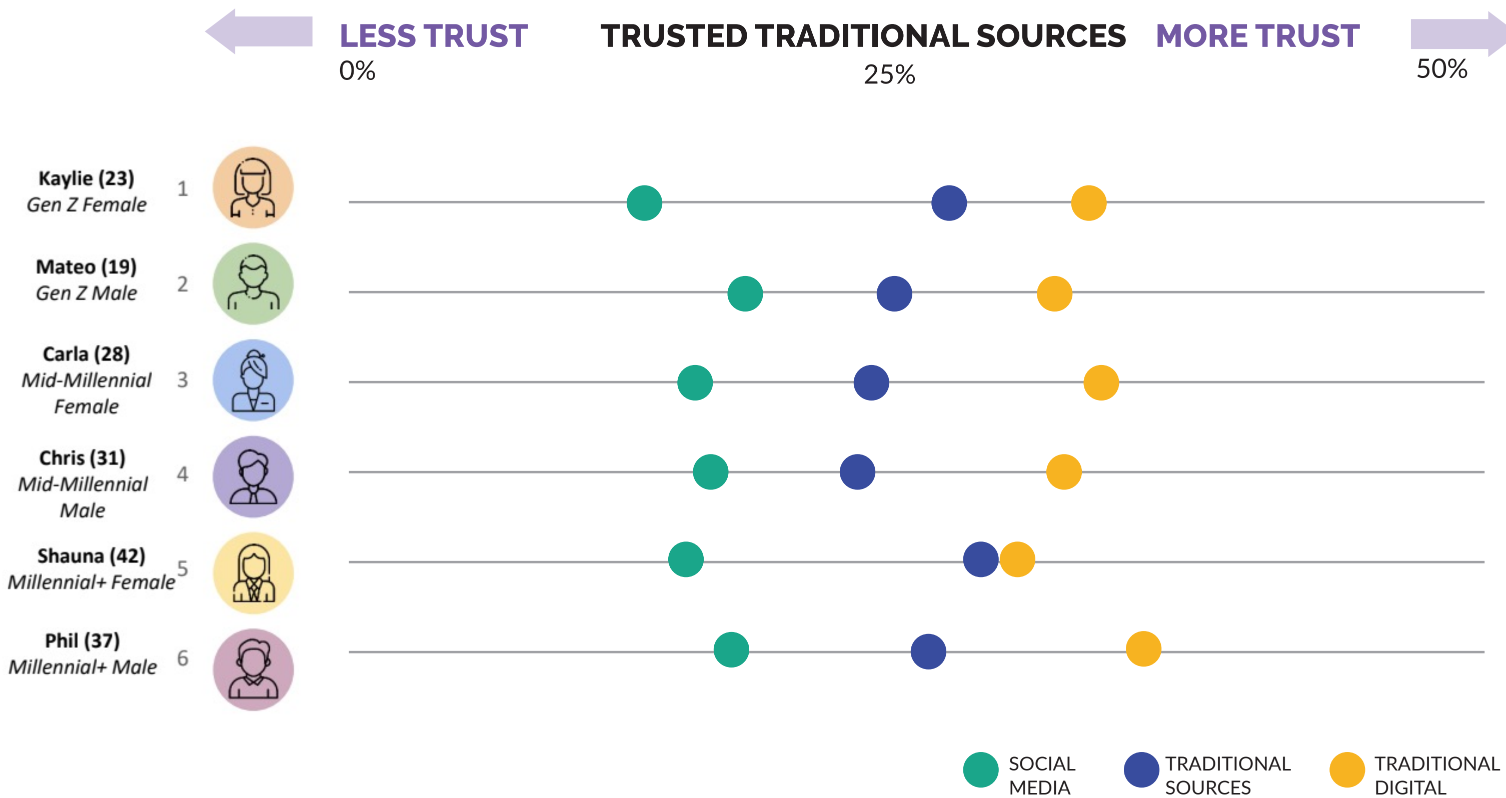
KEY INSIGHT

The majority of respondents feel that a college or university's website is the most trusted media source when considering a continuing education or training program. A college or university website was identified as the most trusted media source when considering a continuing education or training program by 61% of respondents. Other sources which were rated lower included ranking sites (36%) and email (30%).

Trusted Media Sources - By Persona

How are you currently or might you fund your future education? Please select all that apply. (n=770)

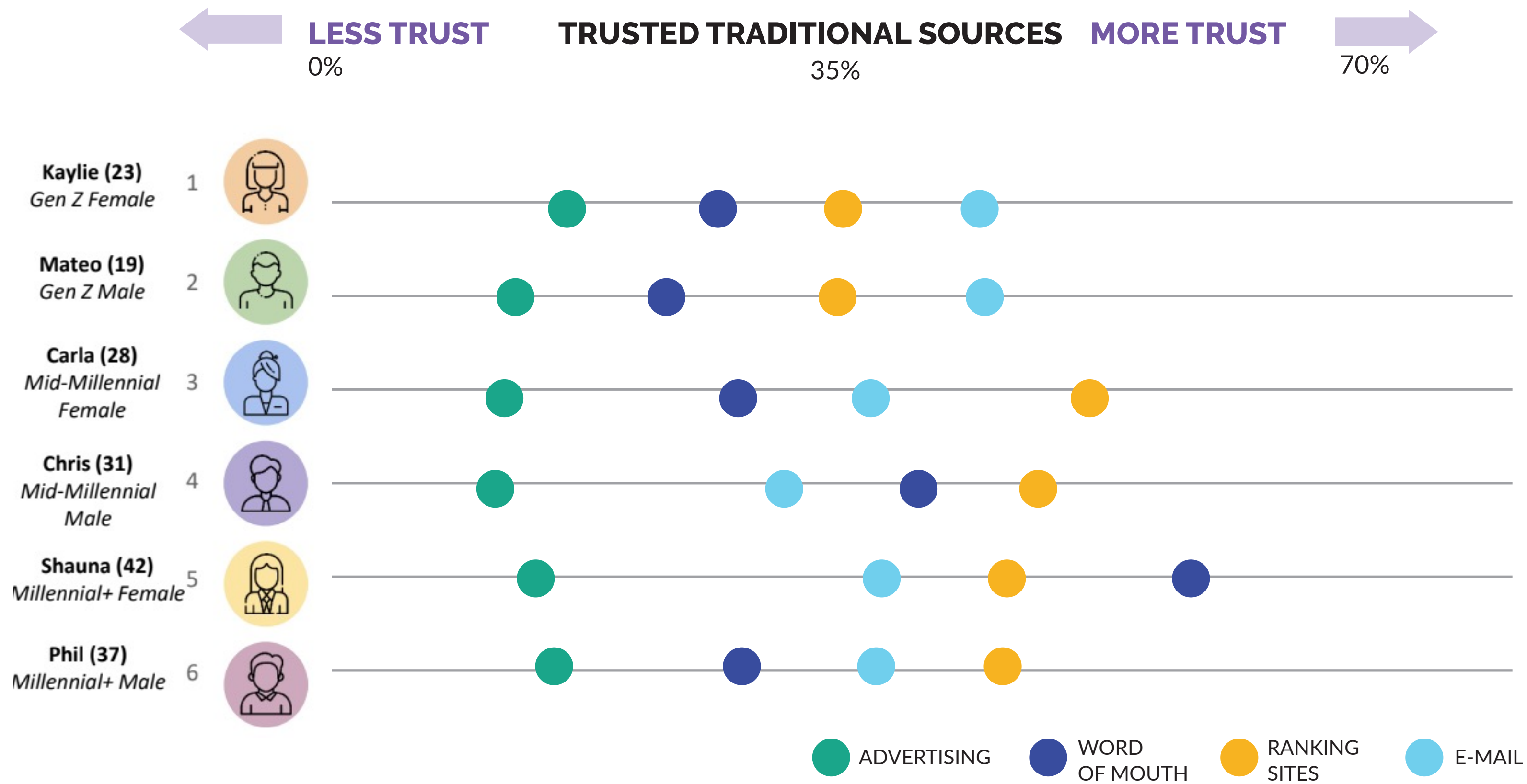
The traditional sources include advertising, word-of-mouth, ranking sites (US News etc.), and e-mail. Traditional digital sources include webinars, YouTube, and university websites. Finally, the social media group includes Twitter, LinkedIn, Facebook, TikTok, and Instagram.



KEY INSIGHT

Across all media sources, the most trusted media source was traditional digital sources followed by traditional sources and social media. Generation Z was the most comfortable with each of the 3 groups of media sources.

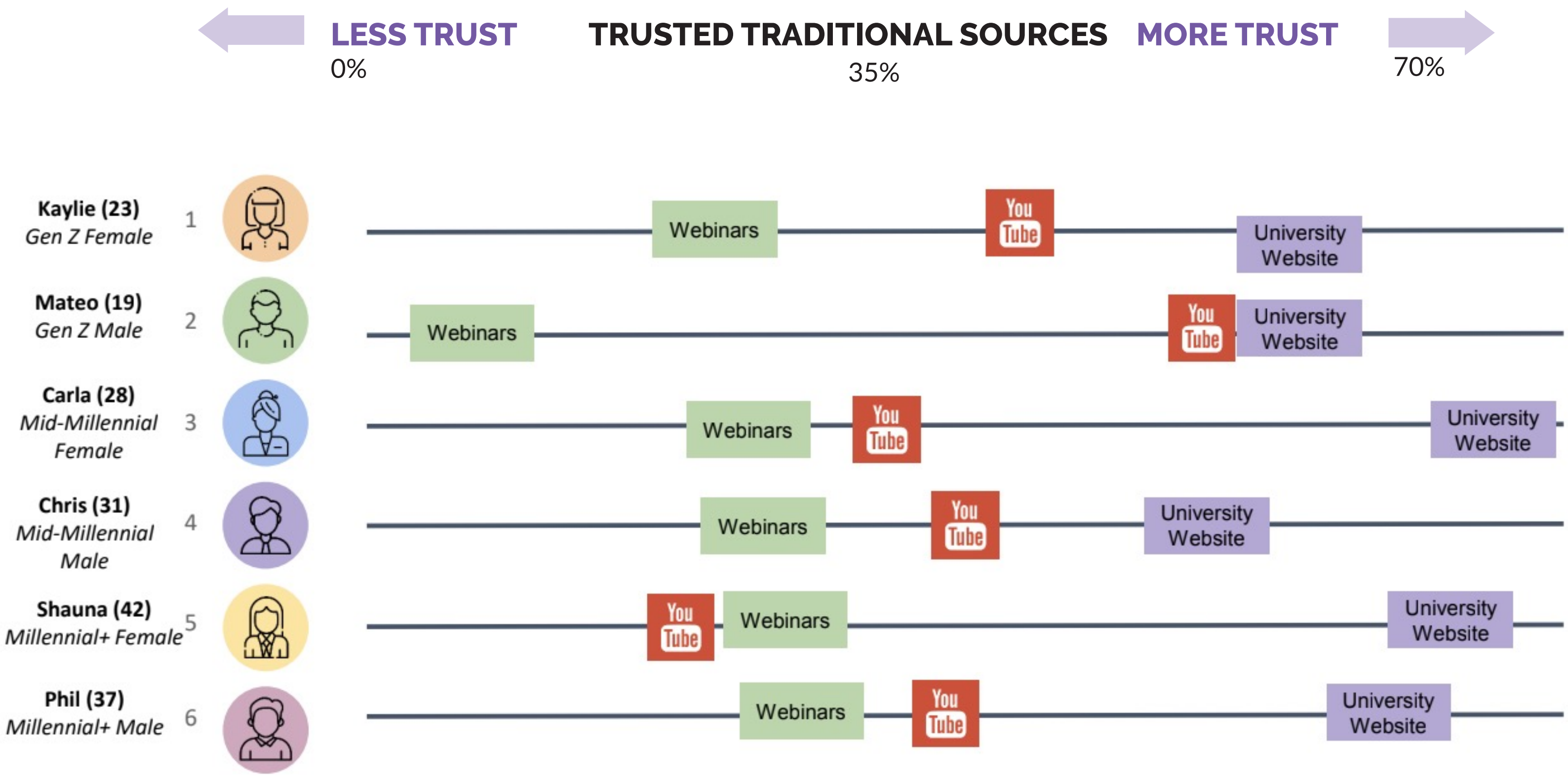
Trusted Traditional Sources - By Persona



KEY INSIGHT

Under the group of traditional sources, the two most commonly trusted media sources across all new learner personas was ranking sites (35.9%) and e-mail (30.6%). Advertising (15.2%) was the least commonly cited media source for personas to trust when receiving information about continuing education and training programs. Shauna (millennial+ female) was the only persona to cite word-of-mouth (40.3%) as her most trusted media source.

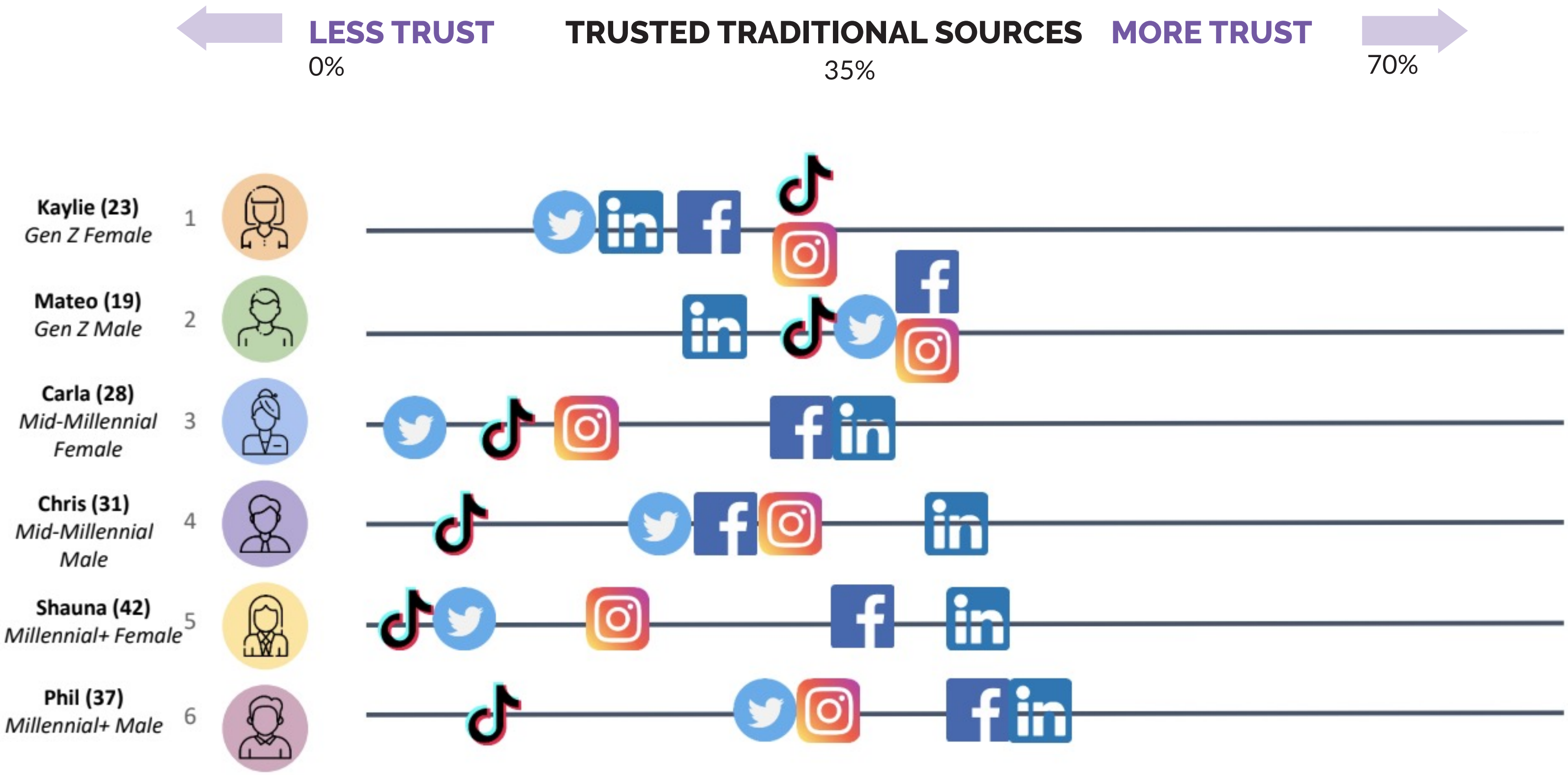
Trusted Traditional Digital Sources - By Persona



KEY INSIGHT

A college or university's website (60.5%) was the most commonly cited trusted traditional digital source by all personas signaling that regularly updating content and innovating modes of delivery on institutions' websites is key for many new learners. The least commonly cited digital source was webinars (18.9%) across all new learners.

Trusted Social Media Sources - By Persona

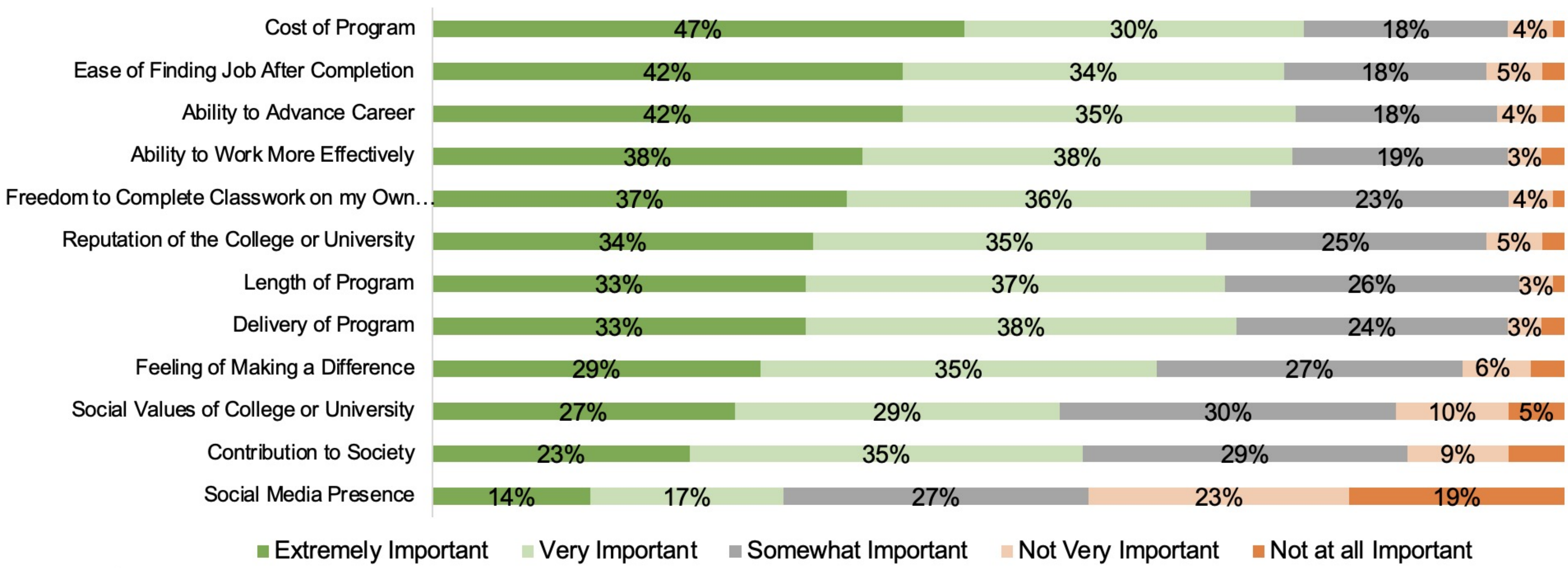


KEY INSIGHT

Generation Z had the most diverse commonly cited mix of trusted social media sources in comparison to older generations. Amongst mid-millennial and millennial+ new learners, the two most commonly cited trusted social media source was LinkedIn (26.0%) and Facebook (23.8%) with TikTok (11.3%) falling far behind for these learners as a trusted source.

Importance of Decision Factors

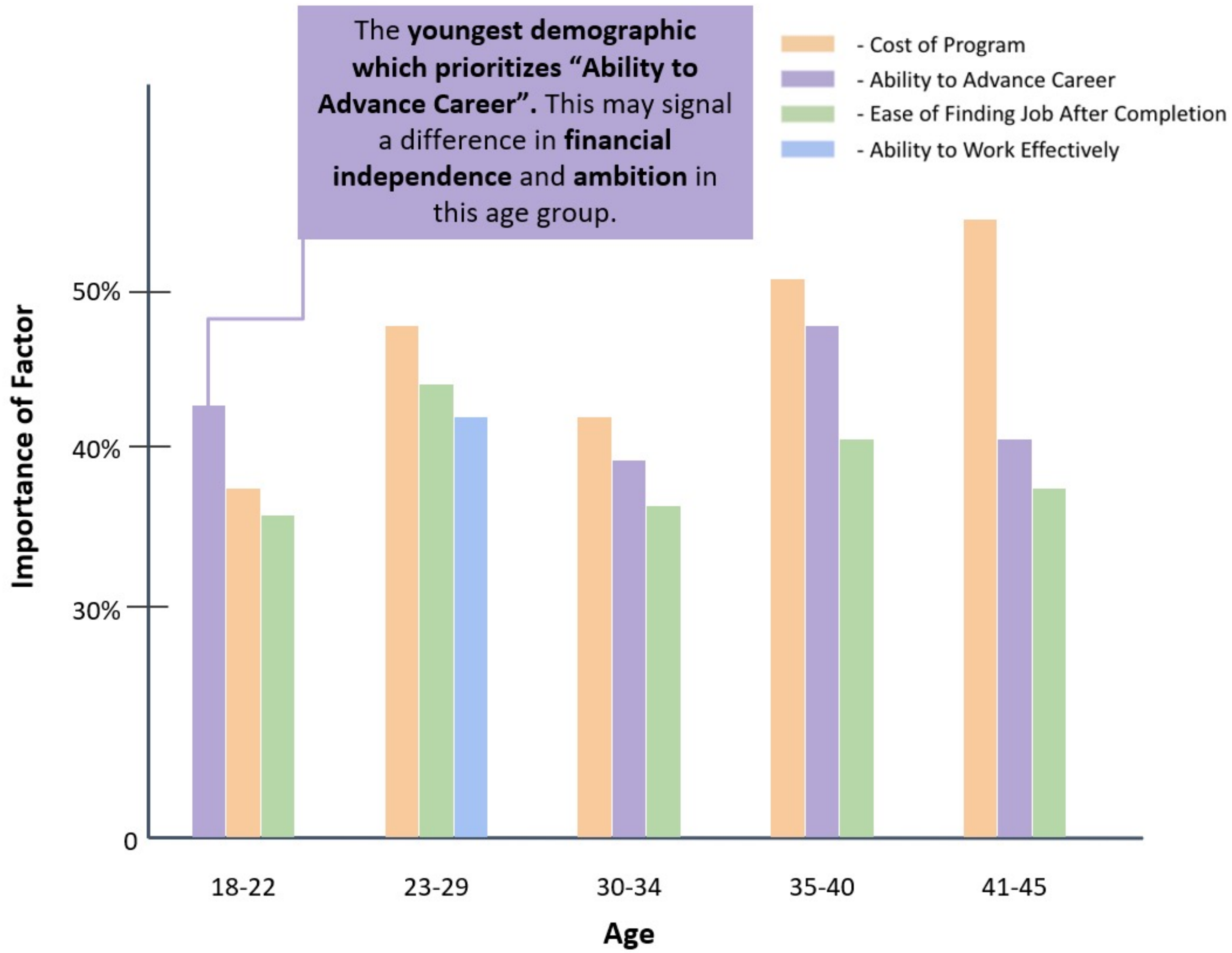
How important are the following factors when making a decision about a continuing education program? (n=800)



KEY INSIGHT

Cost of program was seen as the most important factor when making a decision about a continuing education program. Respondents rated cost of program as the most important factor when making a decision about a continuing education program (47% extremely important), followed by ease of finding job after completion and ability to advance career, both 42% extremely important.

Importance of Decision Factors - By Age

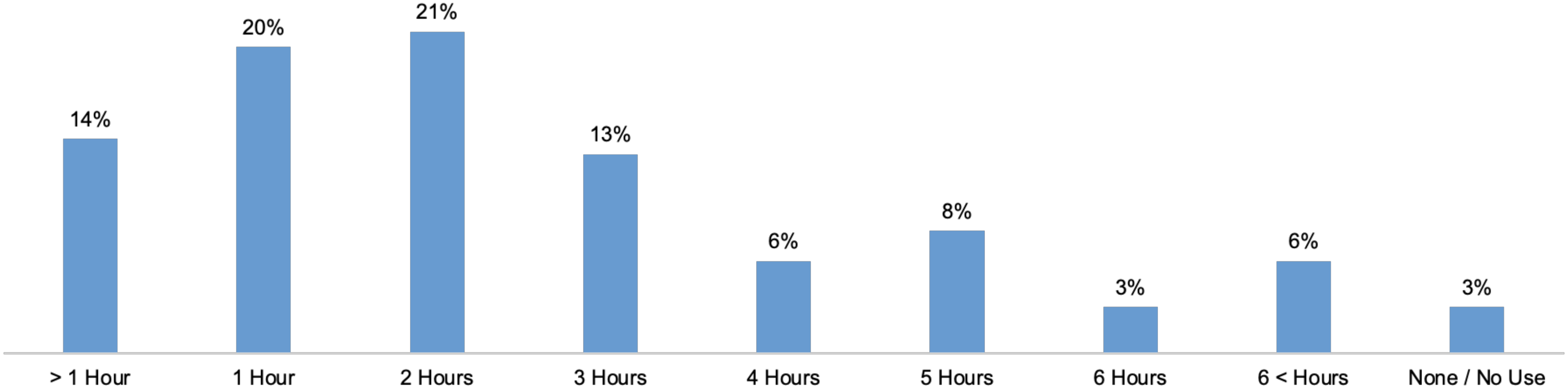


KEY INSIGHT

Twenty-one percent of respondents said they spend an average of two hours a day on social media, while 20% said one hour.

Daily Social Media Use

In an average day, how much time would you estimate you spend on social media? Please list your response in clearly labeled format (i.e., 1 hour and 30 minutes). (n=771)

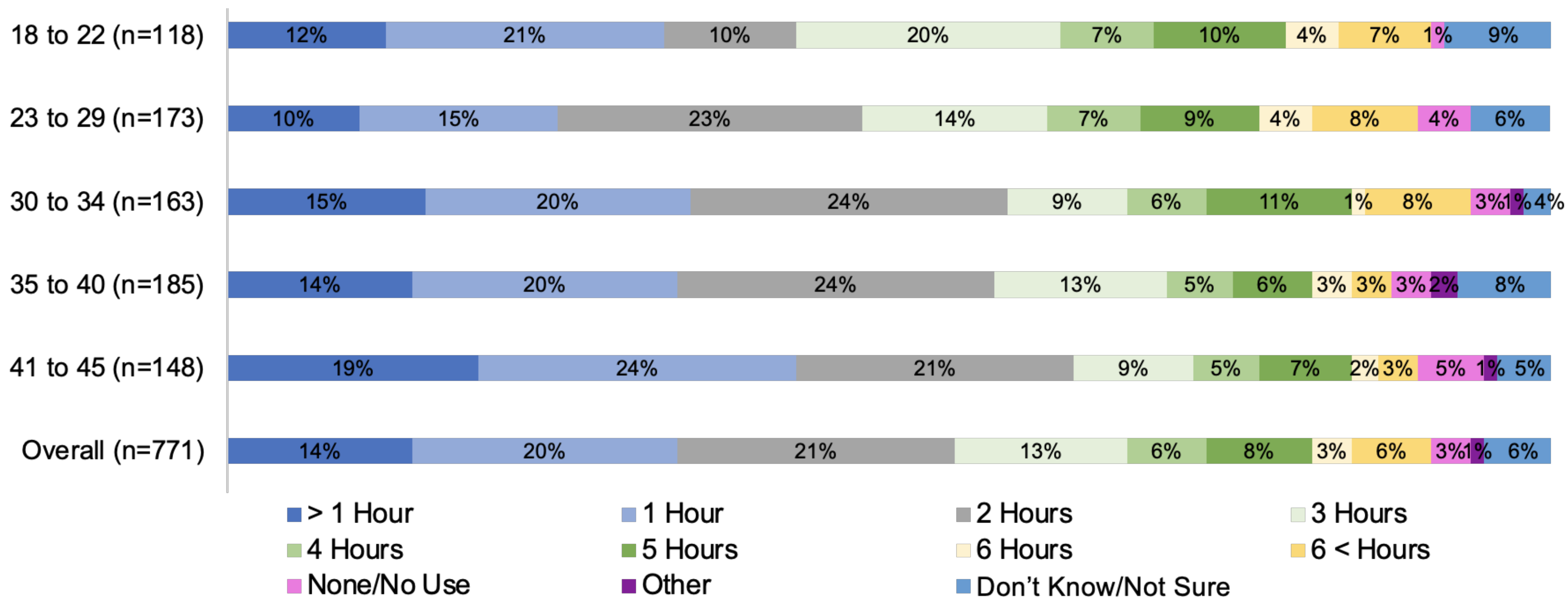


KEY INSIGHT

The youngest age group (18 to 22) was most likely to say they spend three hours in an average day on social media. The oldest age group (41to 45) were most likely to spend less than one hour a day.

Daily Social Media Use - By Age

In an average day, how much time would you estimate you spend on social media?
Please list your response in clearly labeled format (i.e., 1 hour and 30 minutes). (n=771)

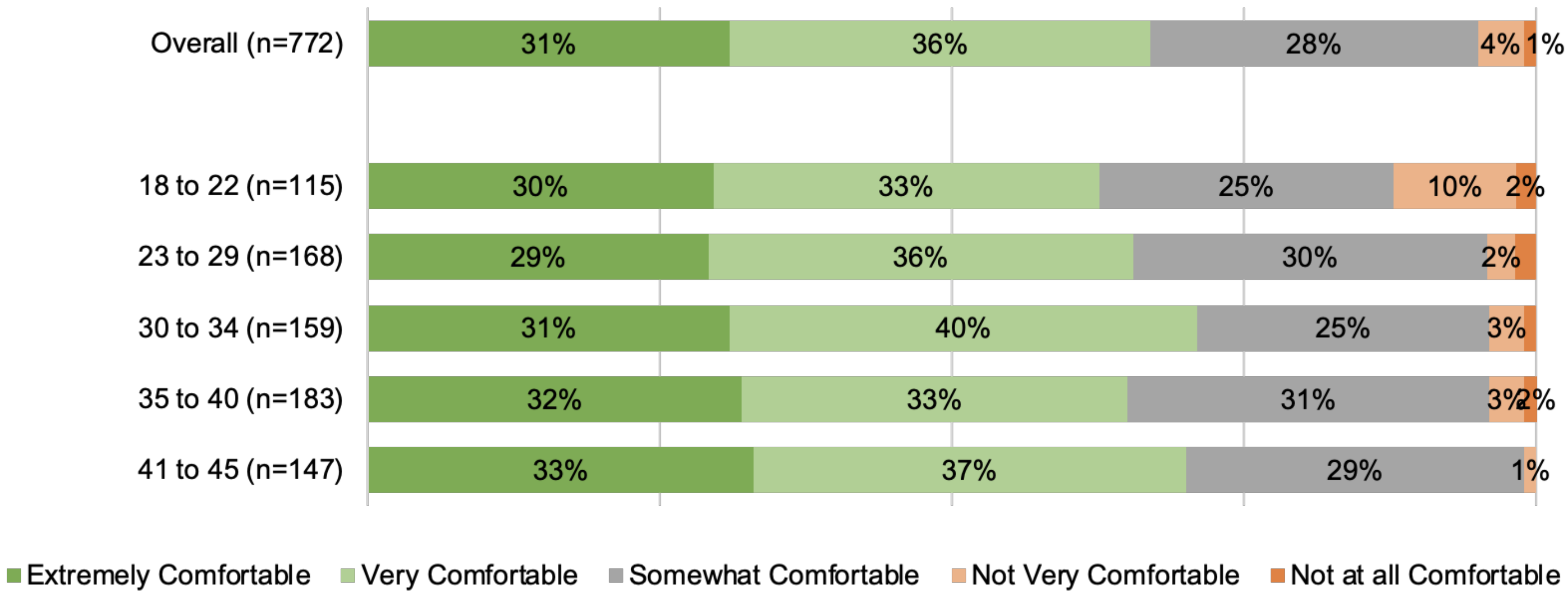


KEY INSIGHT

Two-thirds of respondents said they were extremely or very comfortable gathering information through videos online

Information Acquired via Online Videos – By Age

How comfortable are you gathering information through videos online?



KEY INSIGHT

Two-thirds of respondents said they were extremely or very comfortable gathering information through videos online.

How Do We Keep Them Engaged?

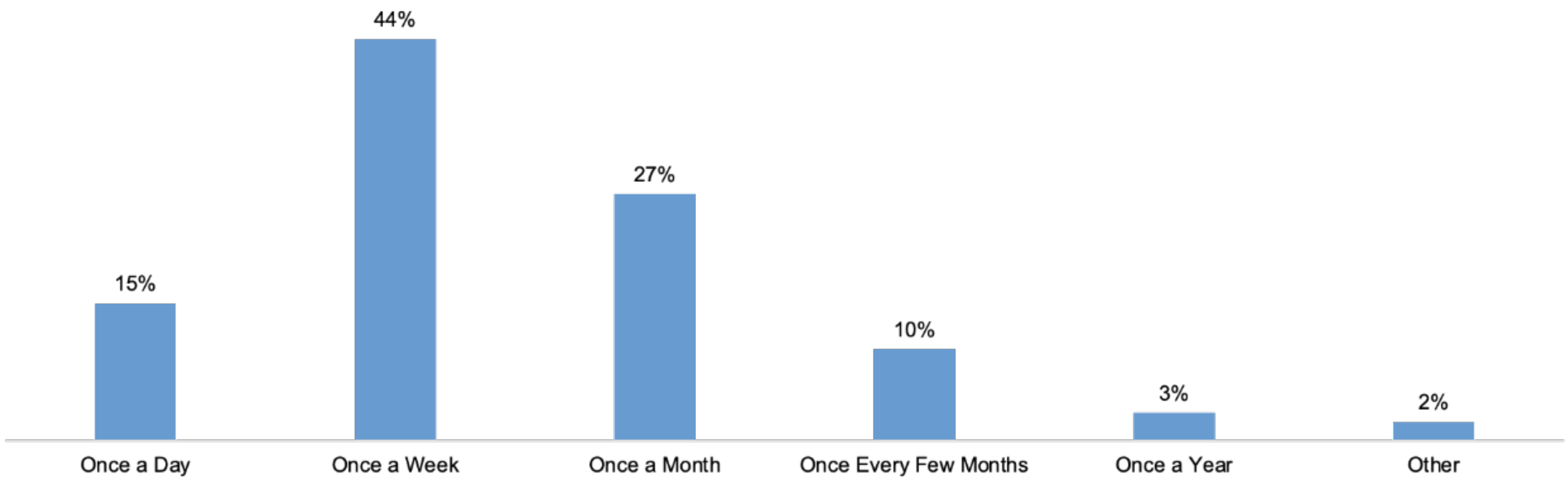
When an individual's attention and interest are captured by an institution, different learners have varying preferences for how engaged they would like to be with an institution. Frequency of engagement and information that is shared with the school can vary depending on a new learner's preference, responsibilities, and comfort zone.

KEY INSIGHT

The most preferred frequency of engaging with a school was once a week with others preferring once a month. Once a week proved to be the best balance of engagement with higher education with decreasing preference the less they were engaged. (10%).

Preferred Frequency of Engagement with School

How frequently would you prefer a school you are interested in engage with you? (n=787)

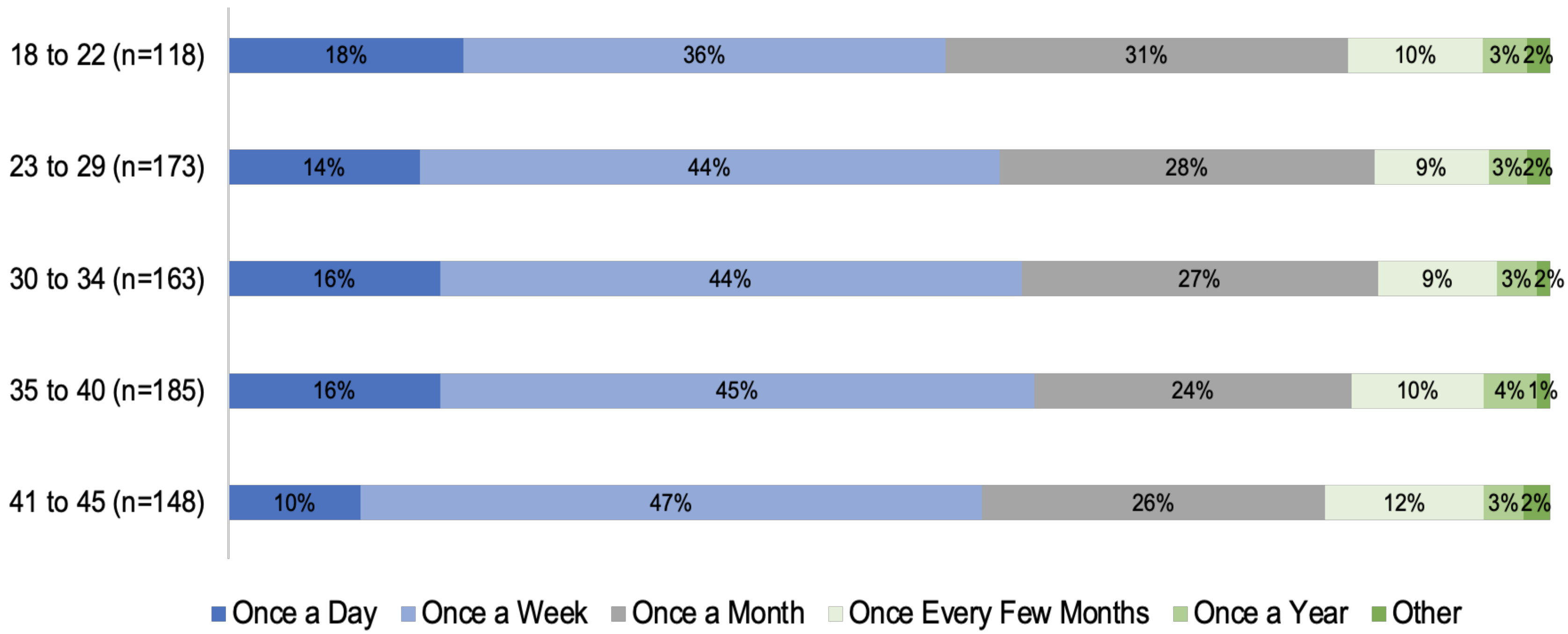


KEY INSIGHT

Forty-four percent of respondents said they would prefer to engage with a school they are interested in once a week, while 27% said once a month. A quarter of respondents said once a day (15%) or once every few months (10%).

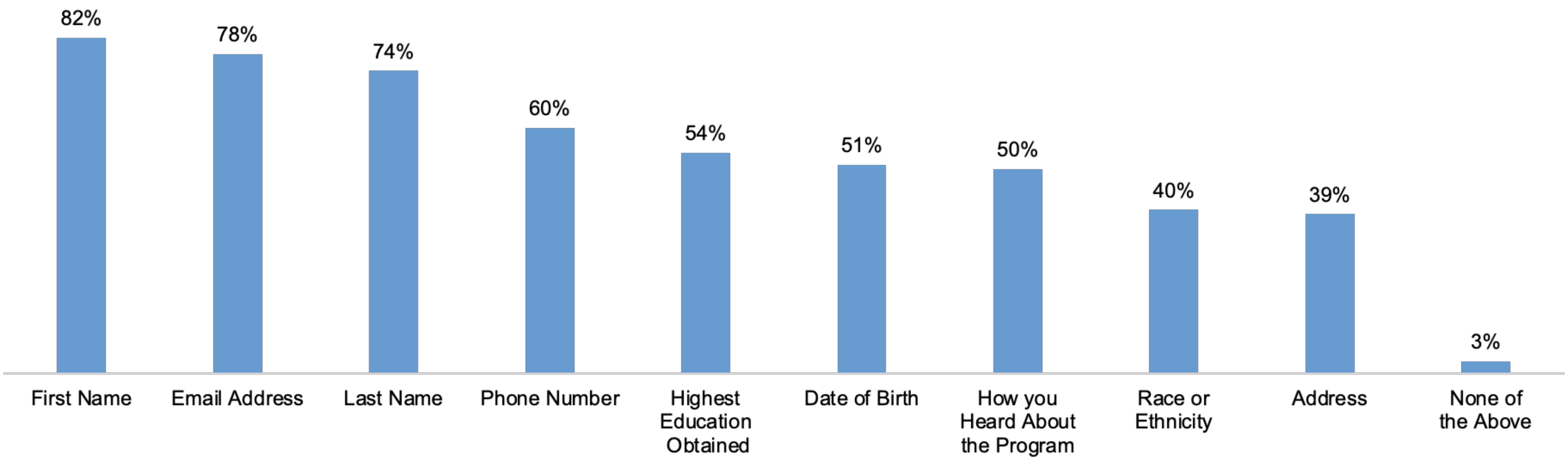
Preferred Frequency of Engagement with School - By Age

How frequently would you prefer a school you are interested in engage with you?



Personal Information Shared with School

When you initially contact a college or university about a program you have interest in, which of the following pieces of information are you willing to share with the school? Please select all that apply. (n=786)



KEY INSIGHT

The majority of respondents were willing to share their basic information with schools such as first name, last name, phone number, and email address. Males were least willing to share than females.

Eighty-two percent of respondents said they are willing to share their first name with the school, 78% email address, 74% last name, and 60% phone number.

The oldest age group was most likely to say they would not provide any personal information with a school. The youngest age group (18 to 22) was least willing to share their first name, email address, or how they heard about the program.

Personal Information Shared with School - By Age

What personal information are they willing to share with the school?	Highest-Ed	First Name	Phone #	E-Mail	Program	Race/ Ethnicity	Date of Birth
1 **Kaylie (23)** *Gen Z Female*	✓ 52.7%	✓ 81.1%	✓ 60.8%	✓ 76.4%	✓ 51.4%	✓ 44.6%	✓ 55.4%
2 **Mateo (19)** *Gen Z Male*	✓ 55.6%	✓ 79.4%	✓ 63.5%	✓ 82.5%			✓ 63.5%
3 **Carla (28)** *Mid-Millennial Female*	✓ 56.5%	✓ 84.5%	✓ 60.9%	✓ 77.6%	✓ 50.3%		
4 **Chris (31)** *Mid-Millennial Male*	– 42.3%	✓ 80.3%	✓ 64.8%	✓ 80.3%	– 42.3%	– 31.0%	
5 **Shauna (42)** *Millennial+ Female*	✓ 65.7%	✓ 85.7%	✓ 63.4%	✓ 80.6%	✓ 60.6%	✓ 49.1%	✓ 56.0%
6 **Phil (37)** *Millennial+ Male*	– 46.4%	✓ 77.5%	– 51.0%	✓ 76.2%	– 43.0%	– 30.5%	– 43.7%
Avg %	54.5%	81.9%	60.1%	78.4%	50.2%	39.9%	51.0%

Females are more willing to share how they heard about the program than males

Females, especially Gen Z, are more likely to share their race and ethnicity

The **more education** one has the **less likely** they are to share their date of birth.

The **youngest age group** (18- to 22-year-olds) were **least likely to want to share** their first name, email address, or how they heard about the program.

The **oldest male age group** was most likely to **say they would not provide** any personal information with a school.

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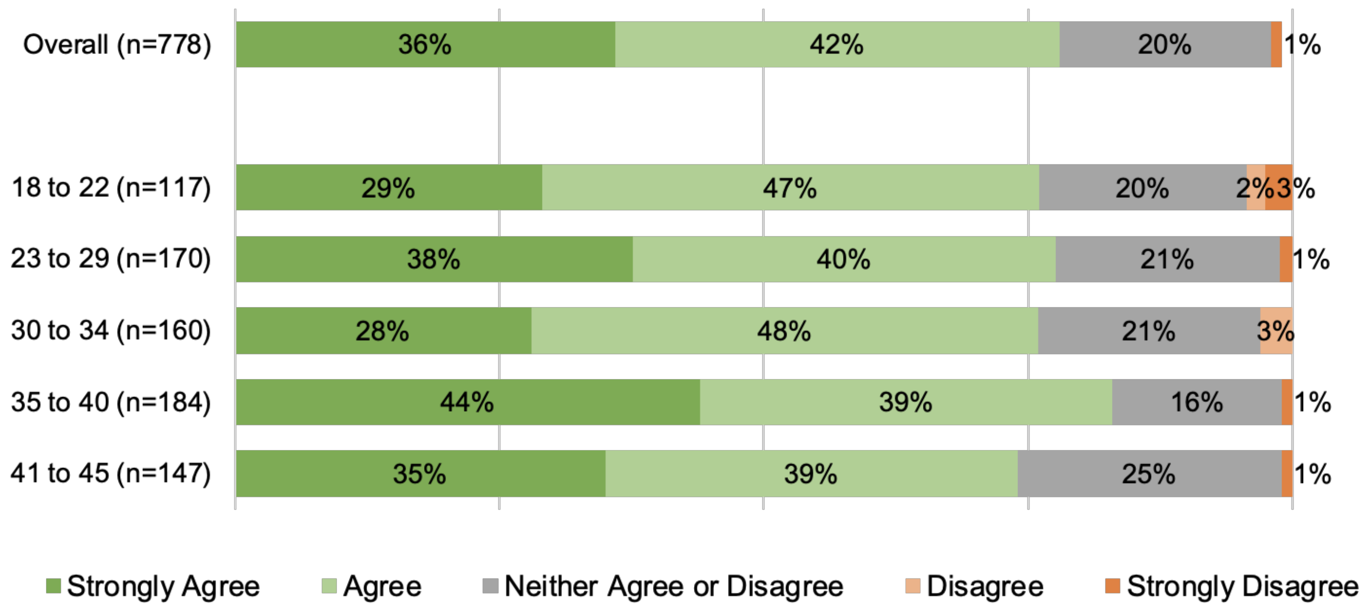
How Do We Keep Them Engaged?

When an individual's attention and interest are captured by an institution, different learners have varying preferences for how engaged they would like to be with an institution. Frequency of engagement and information that is shared with the school can vary depending on a new learner's preference, responsibilities, and comfort zone.

Return on Investment by Pursuing Higher Education – By Age

Please rate how strongly you agree or disagree with the following statement: Pursuing higher education provides a positive return on investment (ROI) for me.



KEY INSIGHT

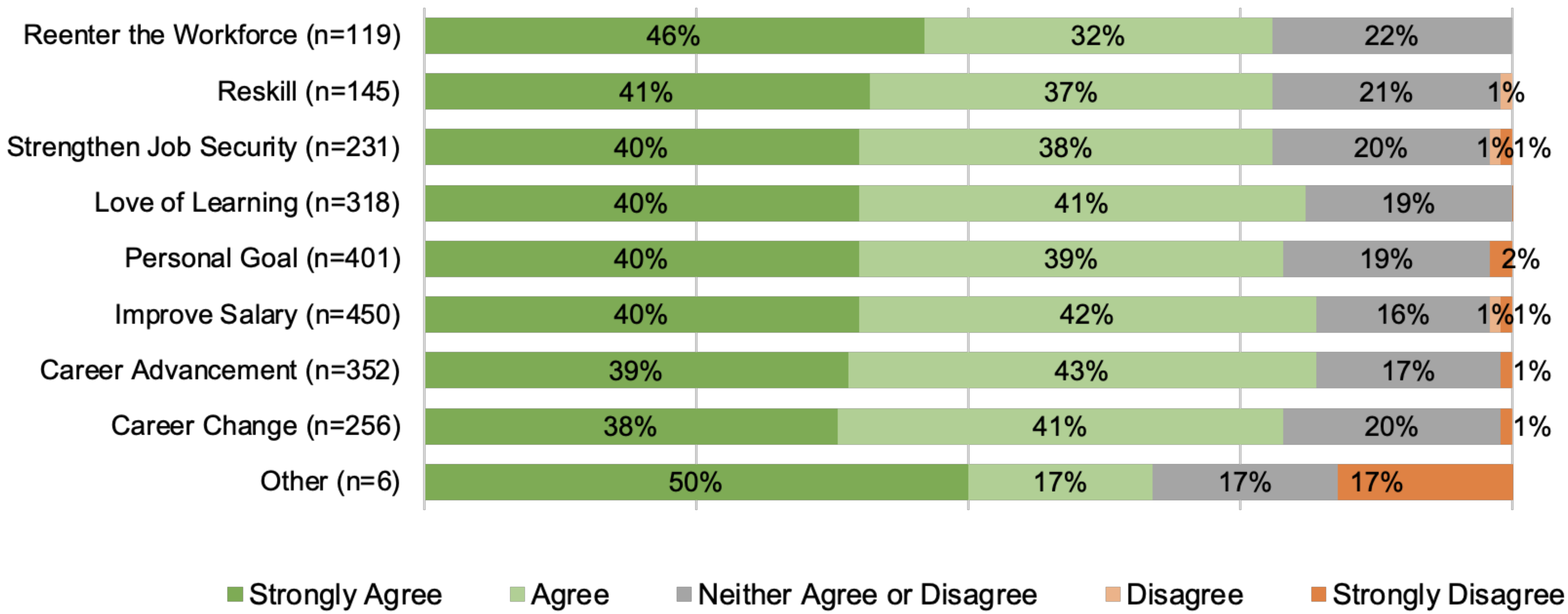
As age increased, respondents were more likely to agree or strongly agree that higher education provides a positive return on investment.

Over three quarters of respondents agree (42%) or strongly agree (36%) that pursuing higher education provides a positive return on investment, especially those 35 to 40.

The consensus that pursuing higher education provides a positive return on investment (ROI) was consistent across all reasons for continuing education.

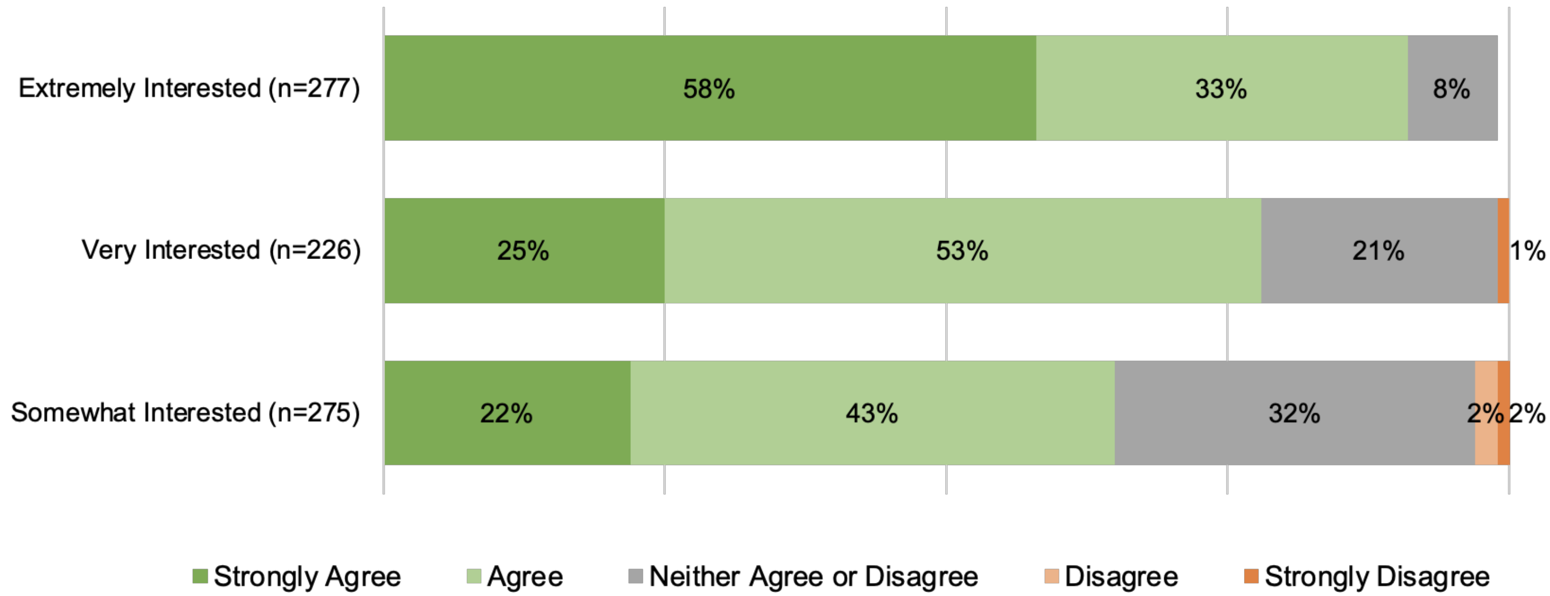
Return on Investment by Pursuing Higher Education - By Reasons for Continuing

Please rate how strongly you agree or disagree with the following statement: Pursuing higher education provides a positive return on investment (ROI) for me.



Return on Investment by Pursuing Higher Education - By Interest in Continuing

Please rate how strongly you agree or disagree with the following statement: Pursuing higher education provides a positive return on investment (ROI) for me.

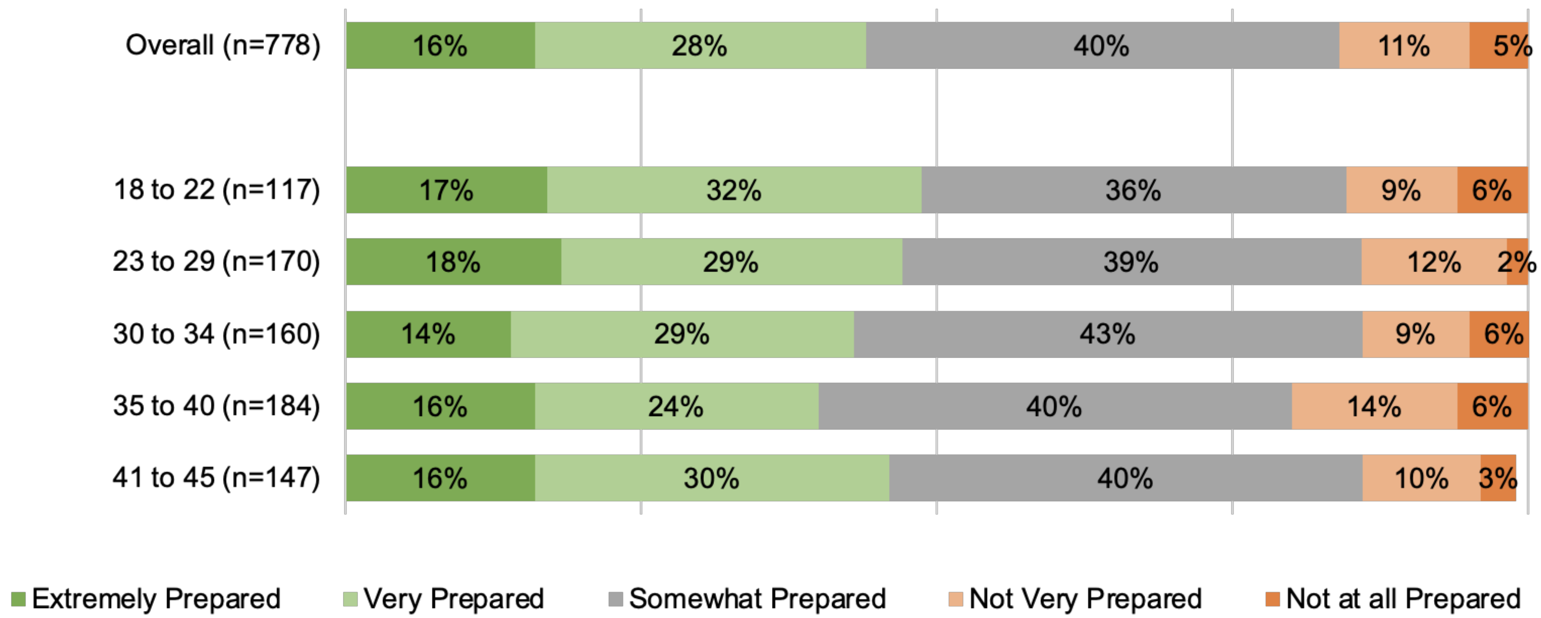


KEY INSIGHT

Respondents who cited they were extremely interested in continuing their education were most likely to strongly agree (58%) with the statement that pursuing higher education provides a positive return on investment. Those very or somewhat interested were more likely to agree with the statement.

Preparedness for New Technological Economy – By Age

How prepared do you feel for the new economy? The new economy is one in which technology will continue to drive economic growth and reshape the workforce.

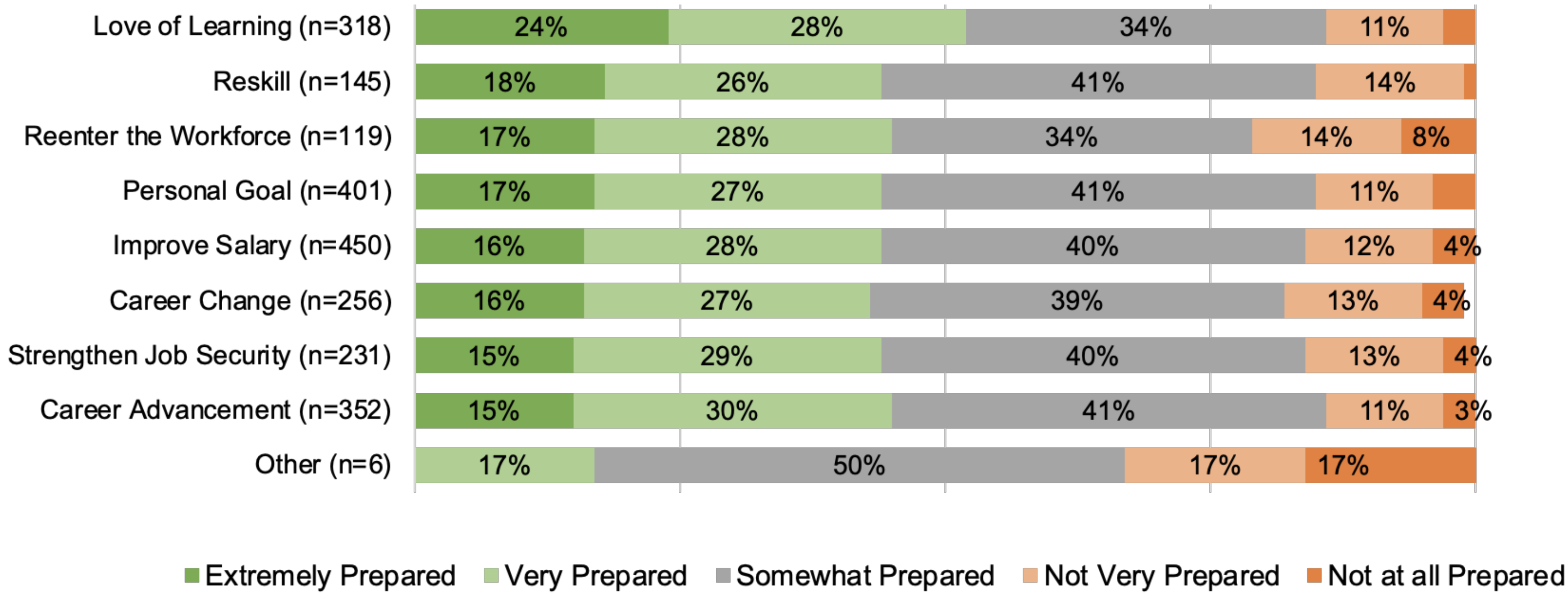


KEY INSIGHT

The majority of respondents cited that they feel somewhat prepared for the new technological economy. Forty-four percent of respondents feel extremely (16%) or very prepared (28%) for the new economy, while 40% feel somewhat prepared. Respondents of all ages most often cited that they feel somewhat prepared.

Preparedness for New Technological Economy - By Reasons for Continuing

How prepared do you feel for the new economy? The new economy is one in which technology will continue to drive economic growth and reshape the workforce.

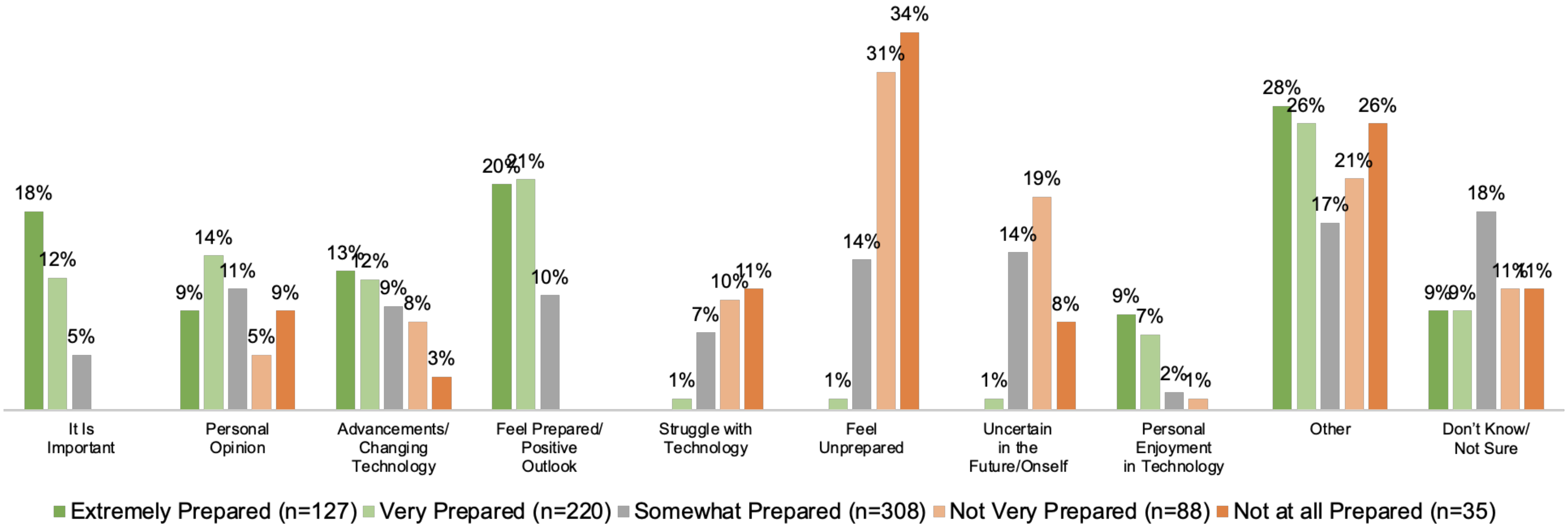


KEY INSIGHT

Respondents who said they were continuing their education because of their love of learning were most likely to say they feel extremely prepared for the new economy (24%). Respondents across all reasons most often cited they feel somewhat prepared.

Reason for Preparedness of New Economy

Why did you give that response?



KEY INSIGHT

Respondents who said they were extremely or very prepared for the new economy most often cited that they feel prepared/have a positive outlook and that it is important to be prepared for technology to continue to drive economic growth and reshape the workforce.

Impact on Higher Education

The landscape of higher education and the workforce has changed significantly over the last decade as technology and digital enterprise dominate our everyday lives. However, higher education often has processes and systems that were built around Millennials or Gen X'ers.

Institutions of higher education need to be more customer-centric, especially around Generation Z or Young Millennials. Systems and processes need to be planned, designed, and implemented to best meet the complex needs of the new adult learners who are critical to the institution's enrollment and also are connected to the changing economy. In addition, these individuals wield significant power in the economy and a poor customer service experience can damage the institution's reputation.

The new adult learner understands social media and crowd sourcing and as a result can better leverage the masses better than previous generations. They are more financially savvy and price sensitive and understand return on their investments.

Colleges and universities need to consider redesigning their marketing and enrollment management processes to better address the needs and complexity of potential students and inquirers. They will also need to engage the enrolled student differently in terms of retention and student success, as this new adult learner is more likely to embody the qualities of a "lifelong learner" than previous generations.

Institutions need to reassess their products, programs, or degrees, into more convenient options, such as stackable credentials. In the future, the student will become stronger and help redefine higher education to be less degree-based. Adult learners may feel that they are not prepared or lack the necessary skills and training to attain their future goals. It is important to understand the motivations and modes of engagement that can attract these new learner segments to redesign and remarket higher education. New learners are finding themselves in an increasingly digitally-focused economy where software skills, knowledge of technology, and remote communication are prominent parts of the workforce.

While much of the literature has encompassed the gaps and misdirection of students enrolling in higher education, little has been said about what institutions can do to mitigate the gaps and move into opportunity areas. If institutions want to attract this new student population and retain their engagement, they will need to adjust their mode and ways of communication and content delivery. As evidenced by this research, demographic and generational differences play a large part in the behaviors and motivations that drive new learners' preferences to continue their education.

With this in mind, it is necessary for institutions to be able to identify these different motivators and communication styles to best cater to new learners in a post-digital world.

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