Fall 2020 / SimpsonScarborough & LinkedIn

Prospective Adult Students Market Research Study

Simpson Scarborough

LinkedIn

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Introduction

We are experiencing a new moment in history. Without data no one can predict how different audiences will be choosing to engage with higher education in the coming months, as the ramifications of a global pandemic continue to unfold.

LinkedIn and SimpsonScarborough partnered together to answer this question and understand what the market and demand looks like for adult learners. Our goal was to understand who these prospective students are and how they want to learn, what their current motivations and barriers are, and how institutions of higher education can best interact with them, attract them, and serve their needs.

02 **Introduction**

03 **Key Findings**

Demand is greater and immediate, and the urgency is even higher for LinkedIn members.

Today's adult learner has pragmatic desired outcomes.

Affordability is a key concern, but institutions must differentiate beyond cost.

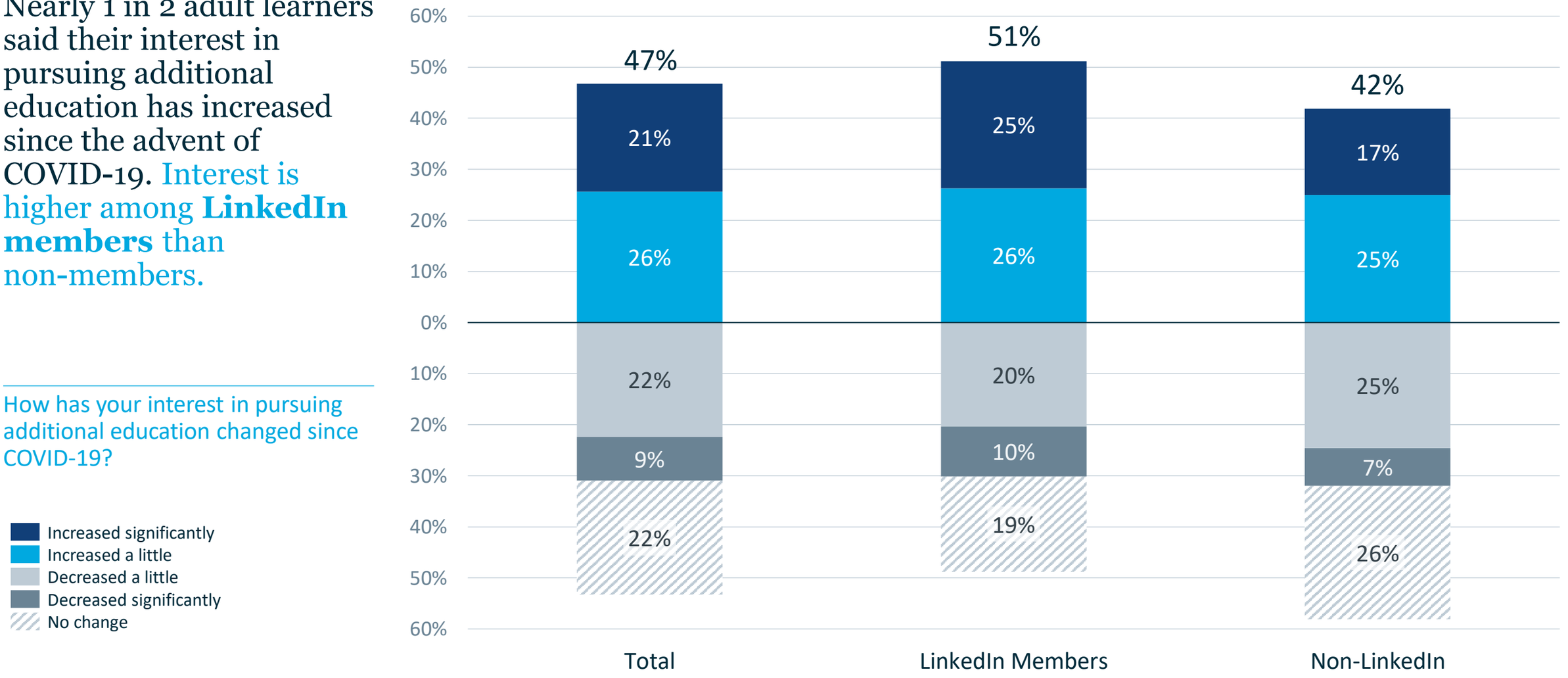
Visibility-building is paramount for long-term success in a crowded market.

24 **Secondary Findings & Methodology**

Demand is greater and immediate, and the urgency is even higher for LinkedIn members.

Nearly 1 in 2 adult learners said their interest in pursuing additional education has increased since the advent of COVID-19. Interest is higher among **LinkedIn members** than non-members.

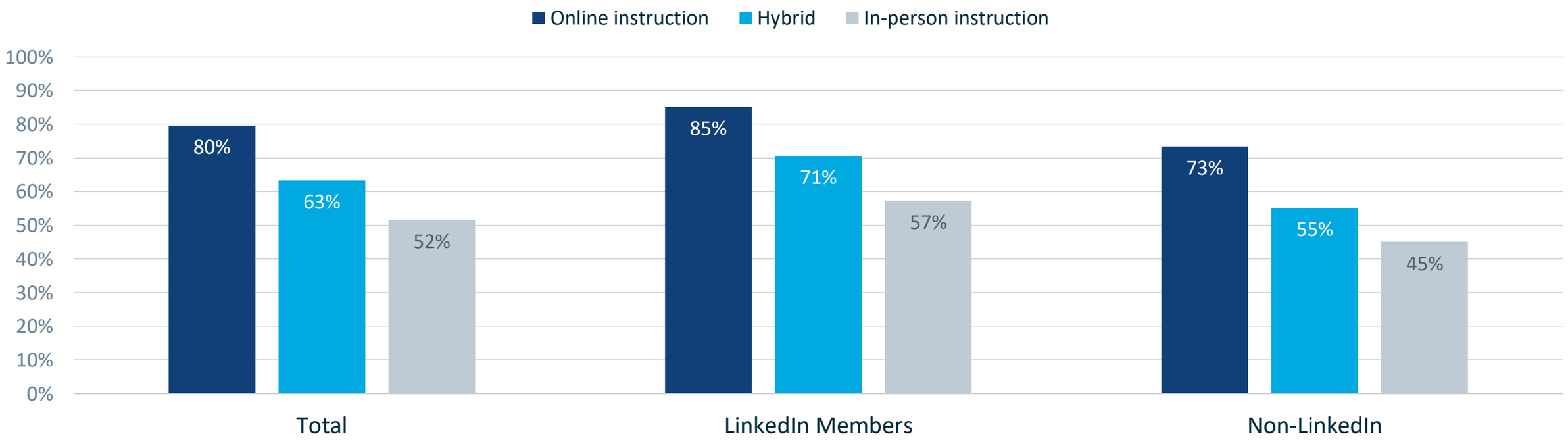
How has your interest in pursuing additional education changed since COVID-19?



8 in 10 adult learners indicate that they are interested in pursuing online education. **LinkedIn members** are even more interested in online programs (85%) than non-members (73%).

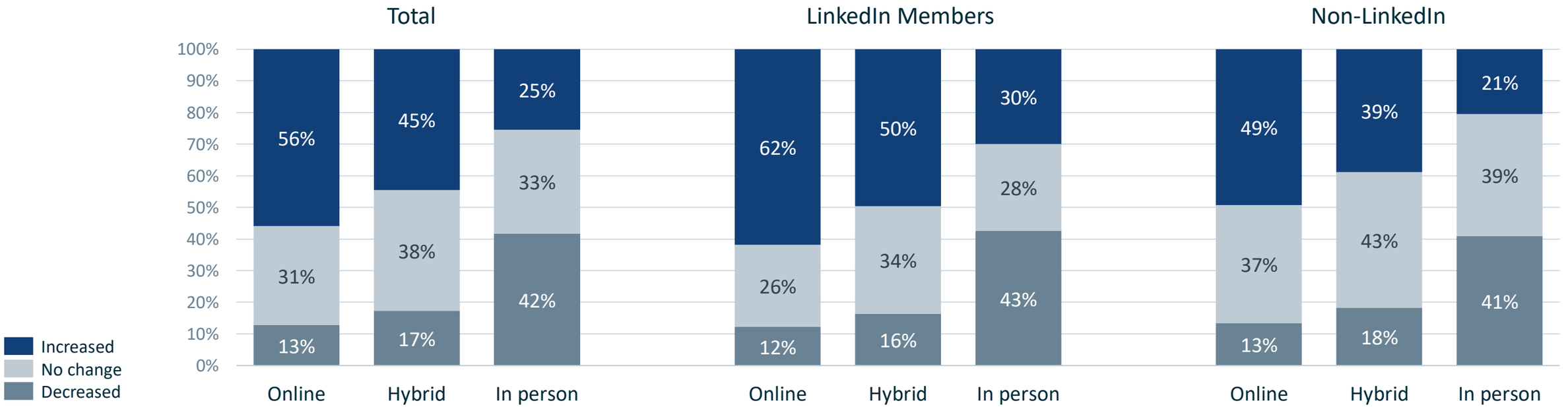
What is your LEVEL OF INTEREST in pursuing additional education via each of the following delivery formats?

What is your level of interest in pursuing education via the following delivery formats? (% Somewhat or Very Interested)



While interest in online education was already high, interest has *increased* towards online and hybrid educational delivery formats and away from in-person as a result of COVID-19. 6 in 10 **LinkedIn members** noted an increased interest in online education, while 4 in 10 noted a decreased interest in in-person.

How has your interest in online, hybrid, and in-person education changed because of COVID-19?

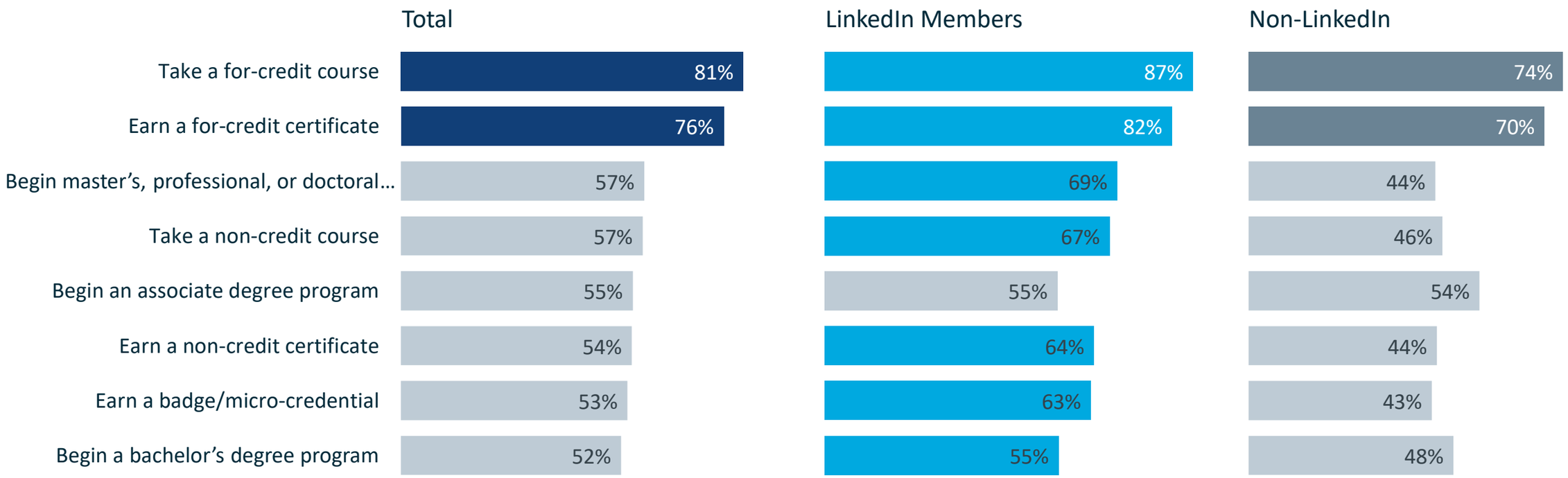


Adult learners are most interested in taking for-credit courses or earning for-credit certificates. And **LinkedIn members** are even more interested in degree and for-credit courses.

Most respondents (97%) were interested in degree and non-degree options, meaning interest is high for education regardless of program type.

How likely are you to do any of the following IN THE NEXT 2 YEARS? Please do not include any courses or programs you are currently enrolled in. Scale: 1=Not at all likely, 2=Somewhat likely, 3=Extremely likely, 4=Don't know

How likely are you to do the following in the next 2 years? (% Somewhat/Very Interested)



Adult learners are looking to move forward with their education incredibly soon. The urgency is even higher for **LinkedIn members.**

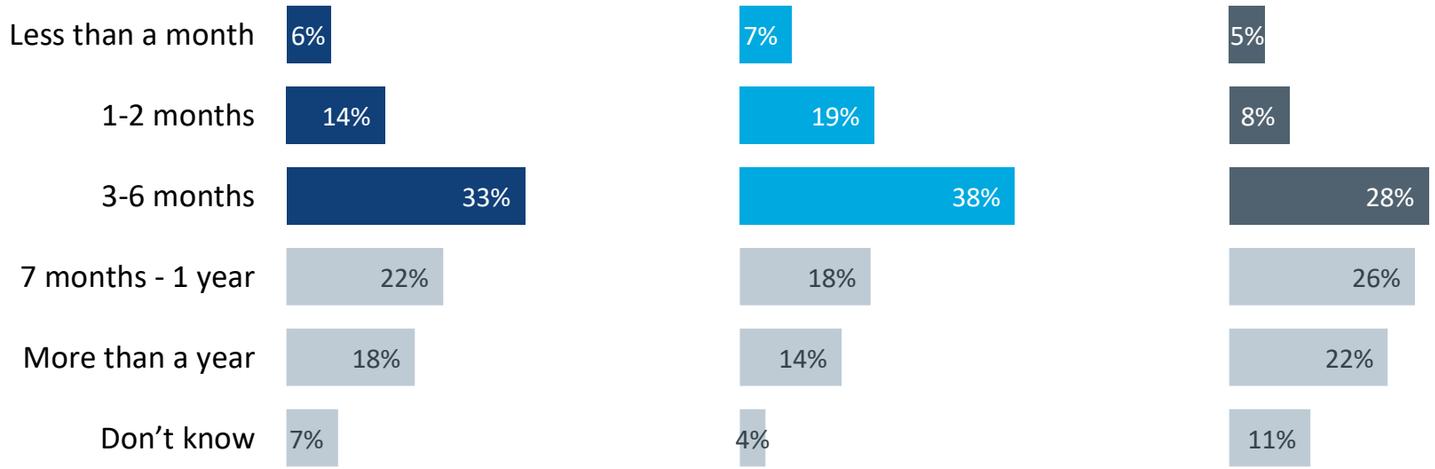
3 in 4 LinkedIn members are actively considering and researching educational options. 6 in 10 plan to enroll within the next six months.

In comparison, about half of non-members are actively considering options, with 4 in 10 planning to enroll within six months.

Are you considering continuing your education (for example, through a course, bootcamp, certificate, degree, or other option) in the next two years?

How soon do you want to enroll in some form of additional education?

	Total	LinkedIn	Non-LinkedIn
Actively considering and researching educational options	67% including 8% who have already applied to programs	77% including 9% who have already applied to programs	56% including 7% who have already applied to programs
Plan to enroll in additional education within 6 months	53%	64%	41%



What the Data is Telling Us —

Adult learners are looking to pursue additional education in this current environment.

1 in 2 prospects are more interested in pursuing education because of COVID-19, and they are interested in all program options.

The sense of urgency among LinkedIn members is greater and more are actively considering and plan to enroll in the next 6 months. With this growing majority seeking online options, there is clearly a new cohort of learners for schools and programs to target. This population segment is actively weighing options and **desires to enroll within the next 6 months** – making them an attentive and engaged audience.

Our Recommendation

We know that in uncertain times, adults seek the future certainty that new knowledge and upskilling provide. The data shows that this global pandemic is no different, and a surge in interest means that schools and programs that offer what prospective students desire must utilize this moment to reach this growing audience.

How? Adults are fully aware that their newfound interest in education (specifically online education) stems from COVID-19, so advertising should be direct in communicating a school's ability to meet prospects' needs. As we'll see, this cohort is pragmatic in their needs and outcomes, and transparent communications around outcomes will be appreciated.

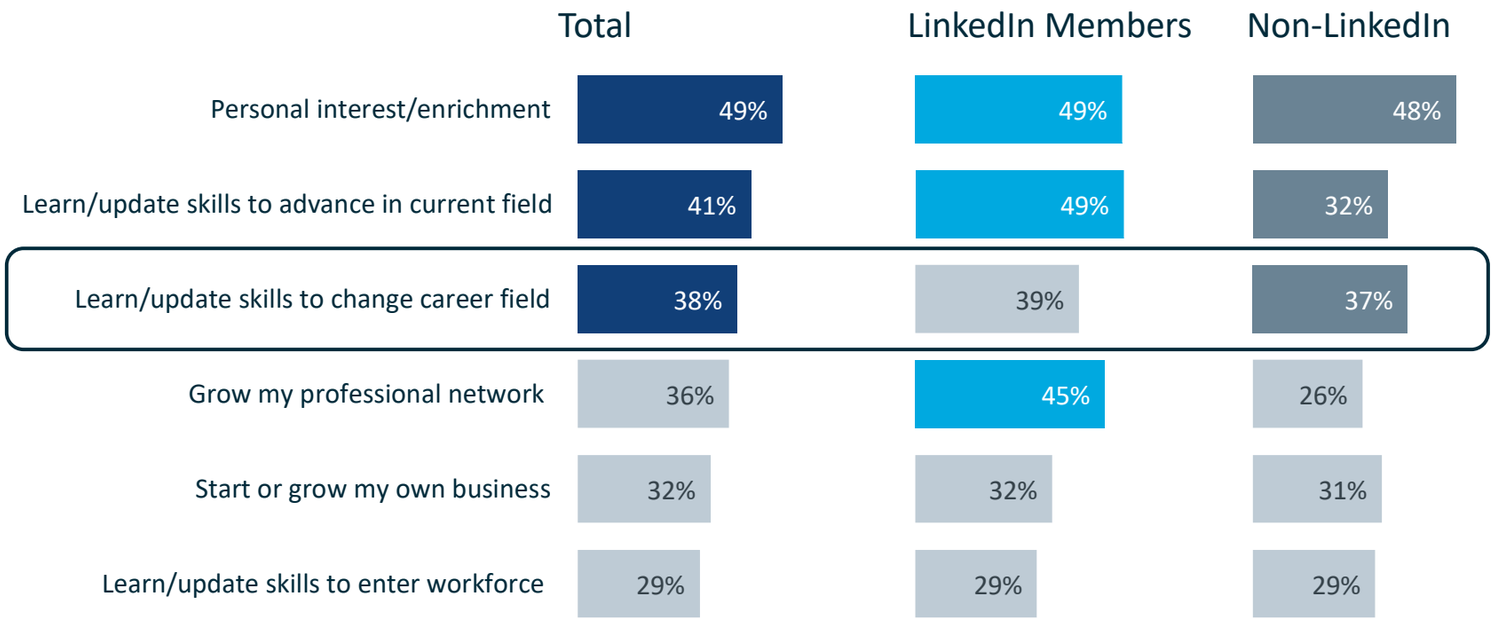
Where? Schools should direct efforts to where the most interested and urgent market is. LinkedIn members have demonstrated greater active interest in additional education since the pandemic, and hope to enroll even sooner than the broader population. LinkedIn members have a demonstrated mindset to grow professionally and are actively seeking opportunities to learn. Leverage LinkedIn's first party member targeting to reach those with the highest propensity to enroll.

And when? Schools and programs should consider immediate investments in marketing designed to reach this new wave of learners who are prepared to enroll now, or in the very near future.

Today's adult learner has pragmatic desired outcomes.

Adult learners primarily want additional education for personal enrichment, to update skills for advancement in their current fields, and to learn skills to change career fields. **LinkedIn members** are also more likely to want to grow their professional networks than non-members.

Why do you want to obtain additional education?

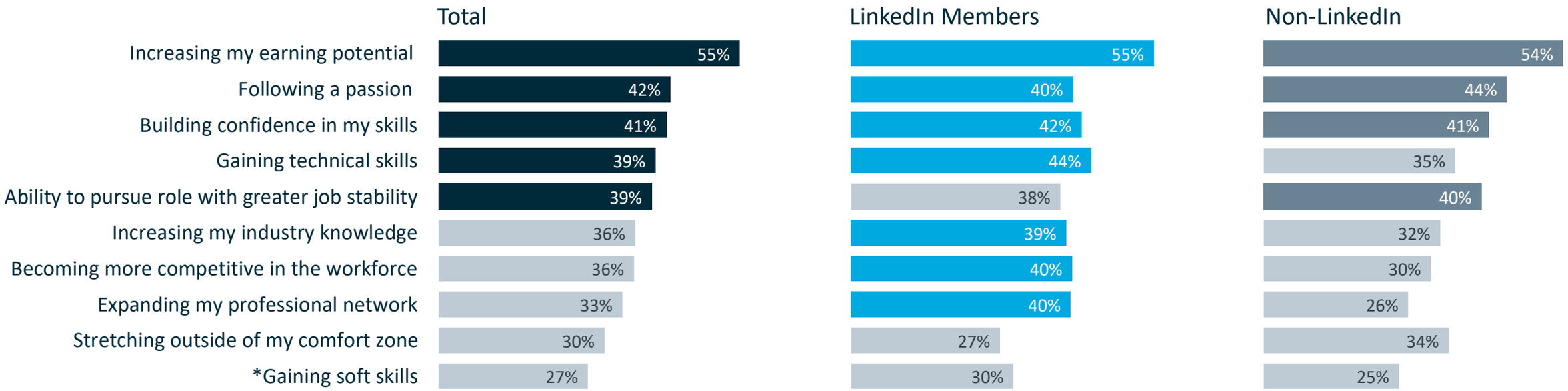


Why do you want to change career fields?

Earn more money	66%
Have more opportunities to advance	50%
Do work that is more stimulating/ better suits my interests	49%
Find a better fit for my talents	47%
Have a more consistent paycheck	35%
Do work that helps more people	34%
Have more control over my workload/schedule	33%
Move into a field that is hiring now	19%

Overall, adult learners predominantly cite increased earning potential among the biggest benefits of additional education. Other top reasons include following a passion and building confidence in one's skills. **LinkedIn members** are more likely than non-members to want to gain technical skills, increase industry knowledge, become more competitive in the workforce, and expand their professional networks.

What are the biggest benefits of obtaining additional education or training?



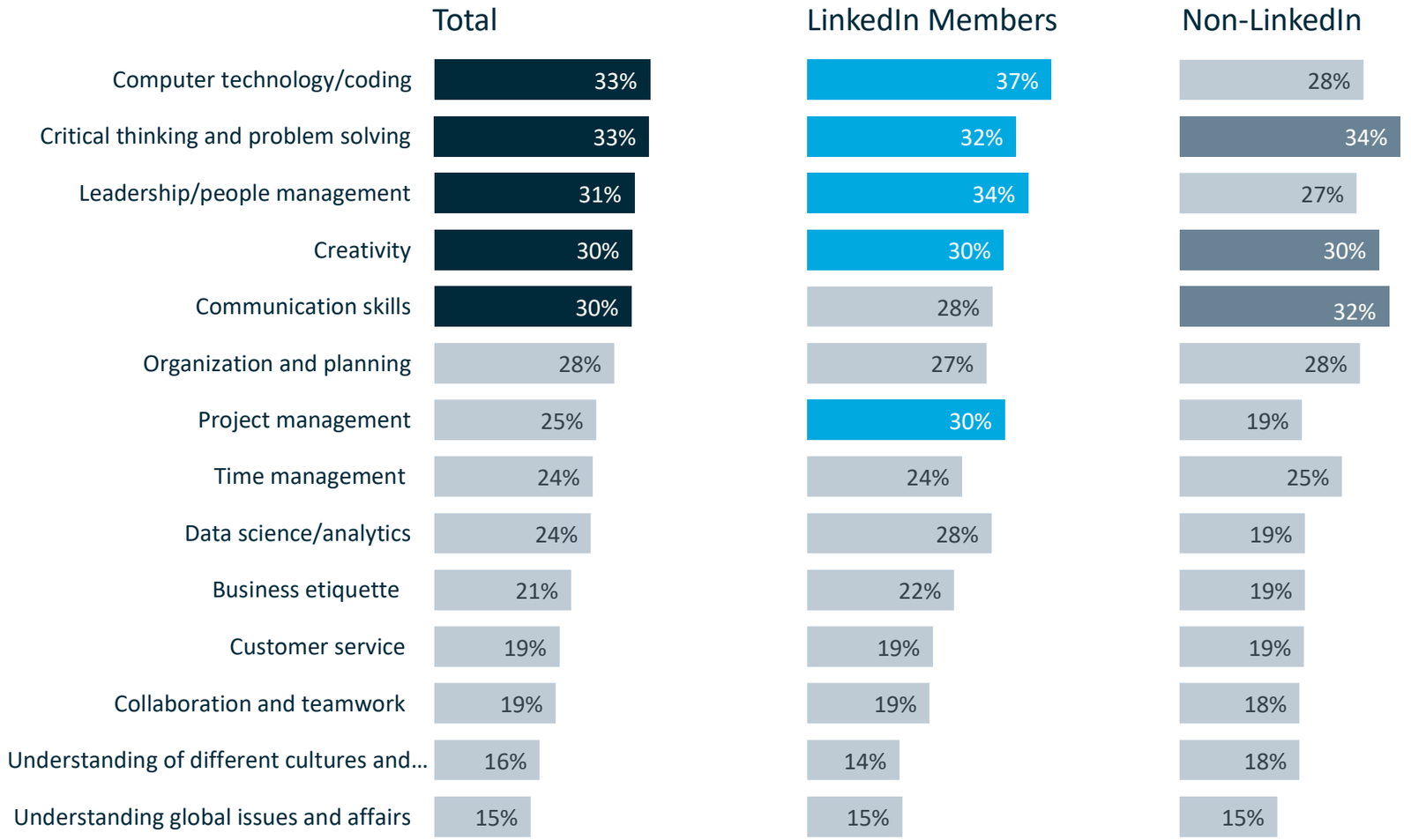
*Full text: Gaining soft skills (e.g. critical thinking, interpersonal skills, etc.)

Aside from computer technology and coding, adult learners are seeking skills such as critical thinking, leadership, and communications.

LinkedIn members have greater interest in computer tech/coding, leadership and people management, and project management skills.

Aside from the specific skills associated with your program, which of the following are you interested in obtaining as part of your additional education? (select all that apply). *"Don't know" and "other" were ≤4% overall and are not charted at right.*

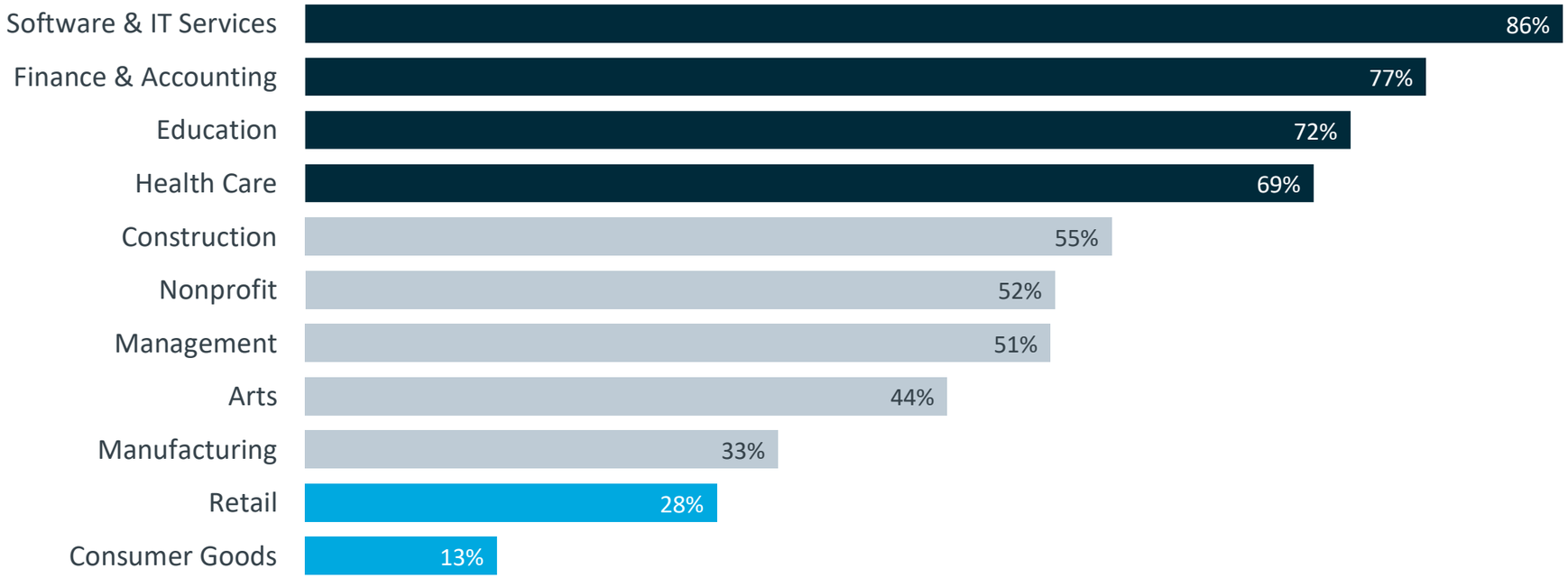
Which of the following are you interested in obtaining as part of your additional education?



Most prospective adult learners indicated an interest in staying in their current industry. This is particularly true for those working in software and IT, finance and accounting, education, and health care.

Respondents working in retail and consumer goods are more likely to be looking for industry changes.

% Of Respondents Who are Planning to Stay in Current Industry (industries with ≥30 respondents shown)



What the Data is Telling Us —

The desire for pragmatic outcomes drives interest in education: prospects want a higher earning potential and to grow their set of skills.

Even more so than non-members, **LinkedIn members** are looking to gain industry knowledge, update/enhance their skills, and get ahead in their career. Nearly 1 in 2 LinkedIn members also want to expand their professional network through education.

Our Recommendation

At the end of the day, the pursuit of higher education is done in the promise of a better future. Even more so today. Adult learners are seeking practical outcomes as result of their education and messaging needs to be tailored to their wants and desires.

Making sure the program is appealing in the market is extremely important. Program-focused marketing messages should showcase how the program of interest and the institution will *benefit* the adult learner and allow them to achieve their stated goals. For instance, how a specific program will teach leadership and management skills that will ultimately allow the individual to advance in their career.

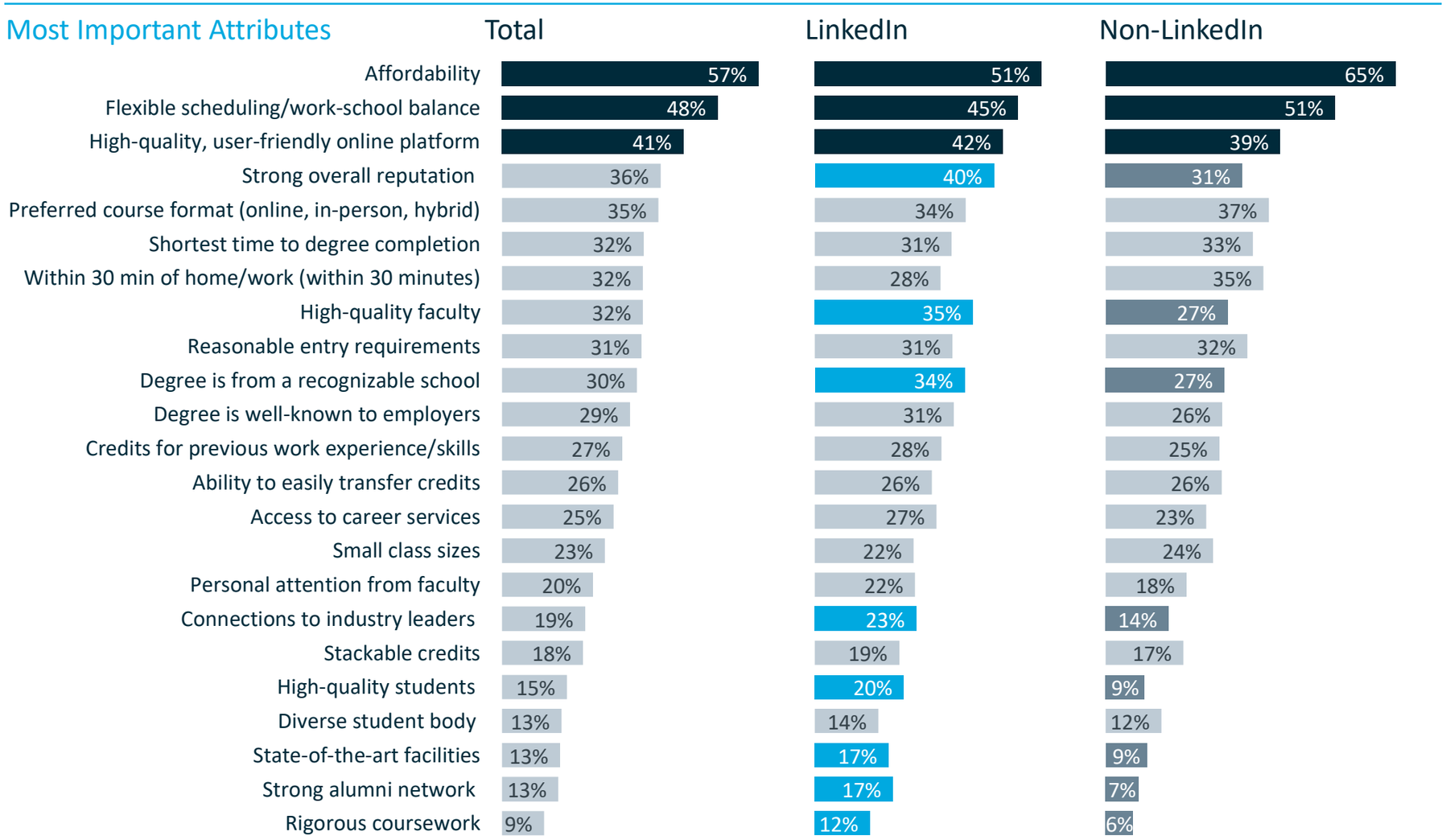
Understanding your target audiences and developing a messaging strategy for communicating the appropriate message via channels that will reach them is a best practice. Develop a user journey to bridge the details of the audience to the marketing plan and identify the best ways to connect your brand with your audience's priorities and goals. Members come to LinkedIn looking for educational opportunities to help them navigate their professional career. Create multiple versions of ad copy to A/B test against specific audiences on LinkedIn and optimize towards best engagement.

Affordability is a key concern, but institutions must differentiate beyond cost.

Adult learners are seeking affordability, flexibility, and a user-friendly experience.

LinkedIn members are more concerned than non-members with reputational attributes including strong overall reputation, high-quality faculty and students, and a degree from a recognizable school. This attributes to the fact that LinkedIn members are more actively seeking education right now.

Which of the following are MOST IMPORTANT to you in considering where to obtain your education? (select all that apply). *"Don't know" and "other" responses were ≤1% overall and are not charted at right.*



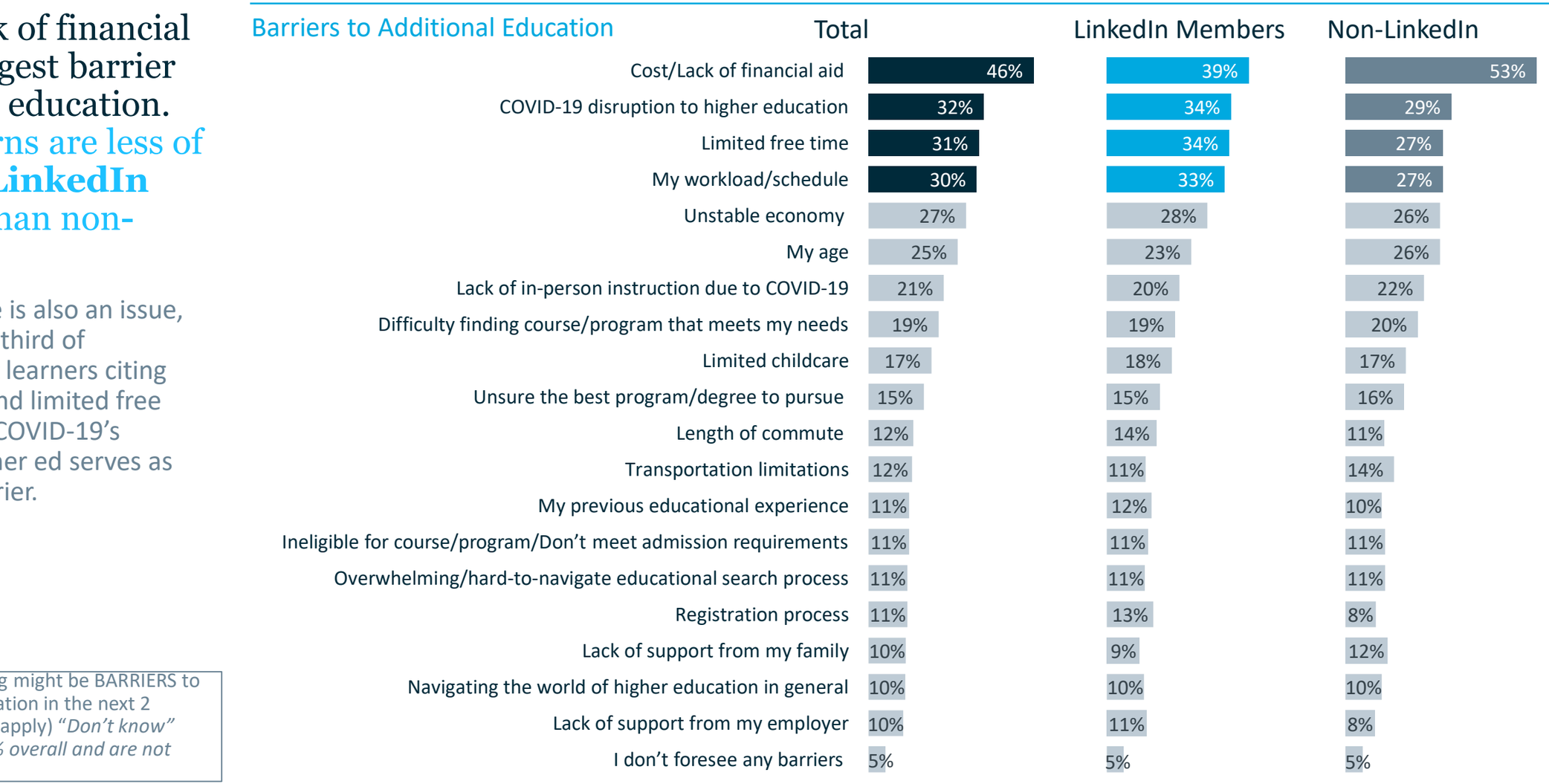
Cost and lack of financial aid is the biggest barrier to furthering education.

These concerns are less of a barrier to **LinkedIn members** than non-members.

Work/life balance is also an issue, with just under a third of prospective adult learners citing their schedules and limited free time as barriers. COVID-19's disruption to higher ed serves as an additional barrier.

Which of the following might be BARRIERS to continuing your education in the next 2 years? (select all that apply) "*Don't know" and "other" were ≤1% overall and are not charted at right.*

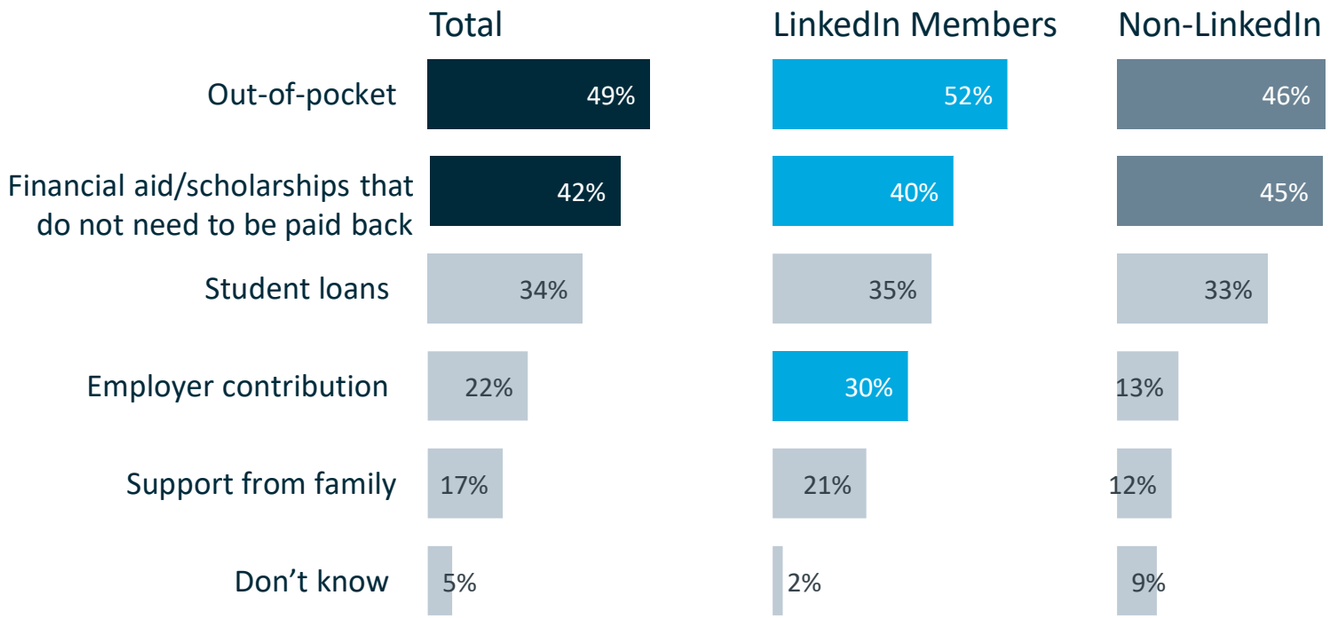
Barriers to Additional Education



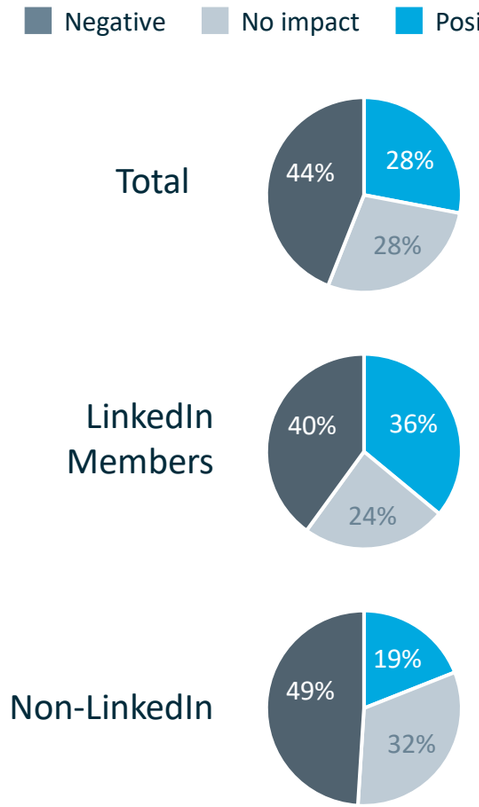
Prospective adult learners plan to pay for their additional education out-of-pocket and through financial aid or scholarships. Approximately 4 in 10 said COVID-19 has negatively impacted their ability to pay.

LinkedIn members are more than twice as likely as non-members to plan on employer contributions.

How do you currently plan to pay for your additional education?



What impact has COVID-19 had on your ability to pay for additional education?



What the Data is Telling Us —

More than 1 in 2 respondents consider affordability to be the most important factor in their decision on where to pursue additional education. But other top attributes indicate the quality of delivery and of the institution.

48% of respondents indicated that flexible scheduling is a major consideration, and 41% noted the importance of a high-quality, user-friendly online platform. Also noteworthy: 40% of LinkedIn members found a strong *overall* reputation of the school to be an important factor.

Our Recommendation

Adult learners have a pragmatic approach to selecting their education source — they want it to be affordable, flexible, and easy to navigate. While COVID-19 had either no impact or a positive impact on about 50% of respondents' ability to pay for education, cost is still a factor even for those prospective students for whom COVID-19 increased their interest in education. But it's not the whole story, and few can win on affordability alone.

Higher education marketers need to understand students' expectations and barriers to enrolling to ensure short and long-term marketing success. The selection criteria of adult learns and the institution's unique way to deliver on them should be a major focal point of your messaging and advertising. Focus on the desired attributes associated with the institution and areas you can "win" against competitors, rather than the features of being affordable. Messaging should be at the intersection of what you can authentically offer and what is desired among adult learners, such as a high-quality online platform, flexibility, and overall reputation.

Cost, and paying for education, are important messages, although best used as down funnel messages. The most successful institutions on LinkedIn highlight the value of their program/course to the end user. While often highlighting fee support or low-cost options, many institutions also look to program flexibility as a key message. LinkedIn audiences, like those on other platforms, are not solely influenced by cost. Pummeling the market with messages about affordability will more than likely hurt in the long-term and compromise perception of quality.

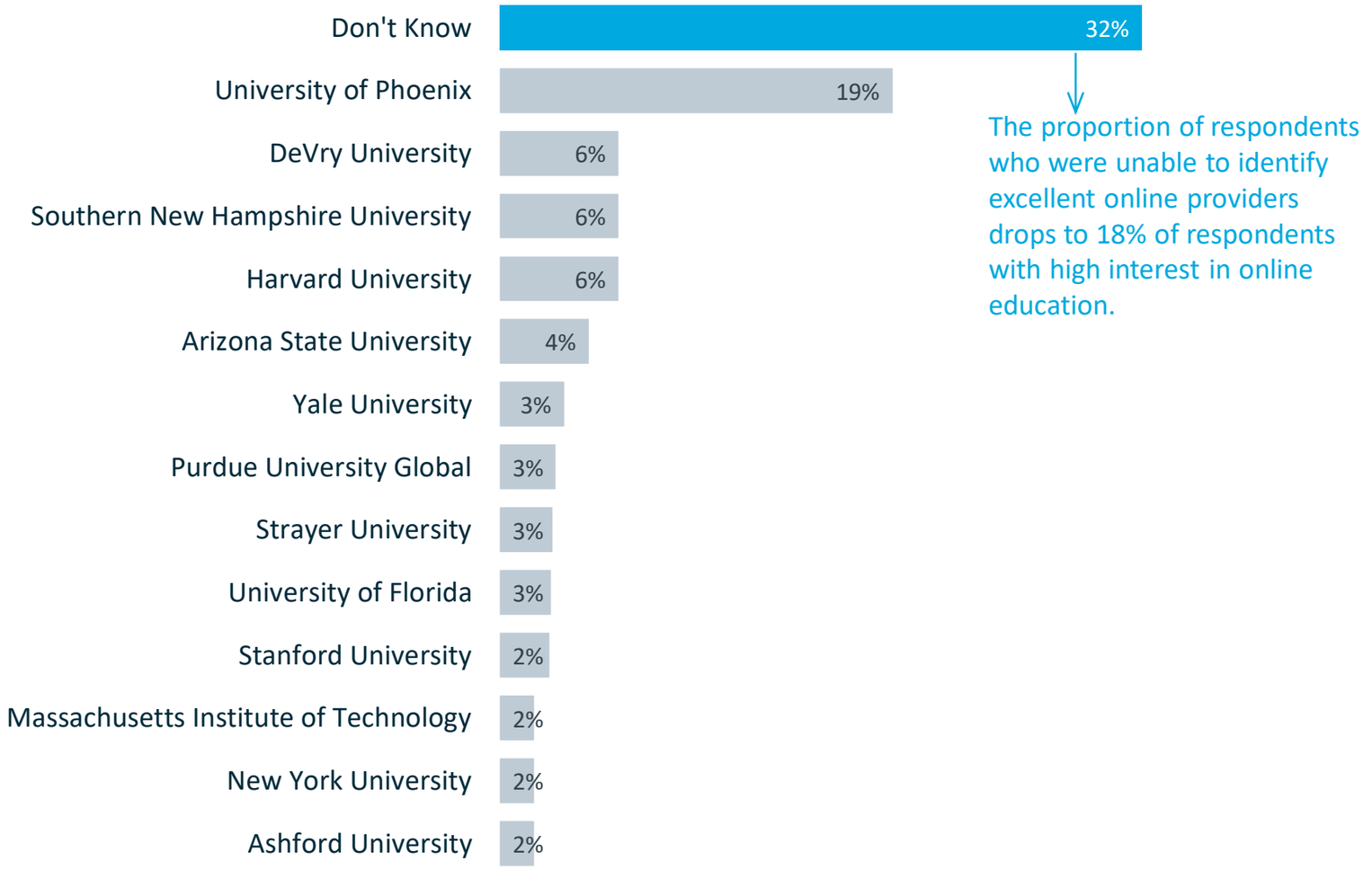
Visibility-building is paramount for long-term success in a crowded market.

A third of all respondents were unable to identify excellent providers of online education when asked to do so through open-ended questions.

Only 13 schools were mentioned by more than 1% of all 1,200 respondents. Of these, many hold strong national reputation, not necessarily in the online space.

Excellent Schools/Providers of Online Education in the U.S.
(>1% respondents)

When you think of EXCELLENT schools or providers of ONLINE EDUCATION in the United States, which ones come to mind FIRST? (allowed up to 5 responses; open-end)



What the Data is Telling Us —

The market is crowded and only a handful of schools hold mindshare. When asked to list excellent online schools, only 13 schools were named by more than 1% of respondents.

While a few schools have some brand awareness among respondents, all have big opportunities for improvement. Most schools are more likely to never have been heard of, or only have their name known than to register any familiarity among respondents.

Our Recommendation

When 1 in 3 respondents cannot name a single excellent provider of online education, there is an awareness problem in the marketplace. Especially in a moment when increased eyes are on the online education space, now is the time to firmly establish a brand identity.

Making gains in brand health metrics takes a lot of time and investment, but it should clearly be a principal goal of an institution in a crowded marketplace with low awareness. The marketing budget should be funded consistently and at levels corresponding with top, middle, and bottom funnel goals, and there *needs* to be a balance of brand marketing and tactical program-specific marketing across channels. It is not an either-or scenario: both are crucial when prospects are weighing your offer and cost against their outcome (read: the value of their degree, and how your name enhances it).

The best approach is to make balanced investments in building overall awareness and positive impressions of the over-arching brand, and precision targeting messages for specific programs. A typical rule of thumb is 60% brand-building (awareness) and 40% direct response (conversion) — and consider a healthy channel mix when you're building your campaigns. Investment in building a powerful reputation now will pay dividends down the road. LinkedIn paid campaigns can help generate awareness of your institution, program or course earlier in the prospective student's decision journey, ultimately driving greater conversion of interest to enrollment

Secondary Findings

High Interest in Online Education

80% of respondents

INTEREST IN ADDITIONAL EDUCATION

Online prospects are more likely than other prospects to be actively considering options and are more interested in starting sooner.

	Online	Other
Actively considering options	71%	51%
Want to enroll within 6 months	57%	38%

Impact of COVID-19: Online learners are more likely to say that COVID-19 has significantly increased interest in additional education, increased interest in online, and decreased interest in in-person. Lack of in-person options is less of a barrier.

	Online	Other
Significantly increased interest in additional education	23%	13%
Increased interest in online learning options	60%	40%
Decreased interest in in-person learning	45%	31%
Lack of in-person learning options is a barrier	19%	27%

On average, online prospects are 1.4 times more interested than other prospects in all types of educational opportunities. They have higher familiarity with online providers, are more likely to consider them excellent, and more interested in pursuing programs they offer.

Top Considerations: Affordability and flexibility are top concerns for both online and other prospects. But high-quality, user-friendly online platforms, short degree completion times, and degrees from recognizable schools are more important to online learners.

	Online	Other
High-quality, user-friendly online platform	44%	26%
Shortest degree completion time	33%	26%
Degree from recognizable school	32%	25%

PERSONAL CHARACTERISTICS

Prospects with high interest in online learning are more highly educated and are more likely than other prospects to be middle level or managers.

	Online	Other
Less than a bachelor's	54%	68%
Bachelor's degree	30%	23%
Master's degree	17%	9%

Middle level or manager

Online	Other
54%	68%

DESIRED PROGRAMS, SKILLS, AND OUTCOMES

Interest in specific skills and programs more often trend towards tech, computer science, and coding among online prospects than other prospects. They are more actively considering educational options and, as a result, are more likely to identify a variety of outcomes as reasons they are seeking education. They are particularly more likely, however, to want to grow their professional networks and learn and update their skills to advance in their current fields.

Programs/Skills	Online	Other
Technology	31%	20%
Computer science	22%	16%
Info systems/data analytics	21%	13%
Computer tech/coding	34%	27%

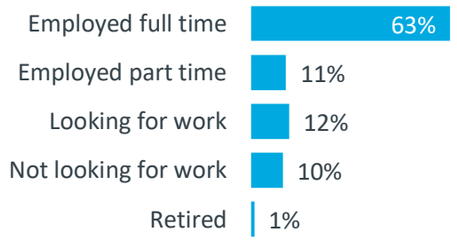
Outcomes	Online	Other
Grow professional network	38%	27%
Learn/update skills	43%	33%

Degree Seekers

81% of respondents are likely to begin an associate, bachelor's, or advanced degree in the next 2 years

PERSONAL CHARACTERISTICS

- 79% ages 30 and up
- 25% mid-level, 16% senior leadership or executives, 12% administrative staff



Household Income	
Less than $50K	40%
$50-74K	22%
$75-99K	16%
$100K and up	21%

Education Level	
No college	19%
Some college/associate	37%
Bachelor's degree	29%
Master's degree	15%

INTEREST IN ADDITIONAL EDUCATION

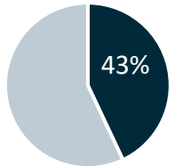
74% Actively searching

58% Plan to enroll within 6 months

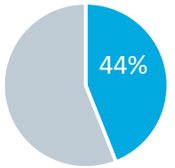
High Interest in Format	
Online	84%
Hybrid	69%
In-Person	56%

Somewhat/Extremely Likely, Next 2 Yrs.	
Take for-credit course	88%
Earn for-credit certificate	83%
Begin master's, professional, or doctoral degree	71%
Begin associate degree	68%
Begin bachelor's degree	64%

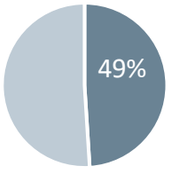
COST AS A BARRIER TO EDUCATION



Cost/financial aid is a barrier to education



COVID-19 has had negative impact on ability to pay



COVID-19 has had negative impact on employment

IMPORTANT ATTRIBUTES

Like all prospective adult learners, degree seekers identify affordability, flexibility, a high-quality and user-friendly online platform, and strong overall reputation as their top considerations when researching their educational options.

Top Considerations	
Affordability	55%
Flexibility/work-school balance	48%
High-quality online platform	41%
Strong overall reputation	36%

MOTIVATIONS

Personal enrichment	49%
Advance in current field	44%
Grow one's professional network	39%
Change career fields	39%
Start or grow a business	33%
Enter the workforce	31%

TOP BENEFITS

Increasing earning potential	55%
Following a passion	42%
Gaining technical skills	42%
Building confidence in one's skills	42%
Pursue job with more stability	40%

Prospective Adult Learners by Age

20% ages 25-29, 43% ages 30-39, 37% ages 40-55

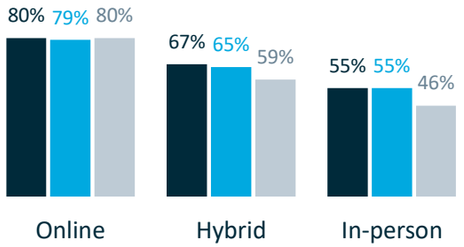
INTEREST IN ADDITIONAL EDUCATION

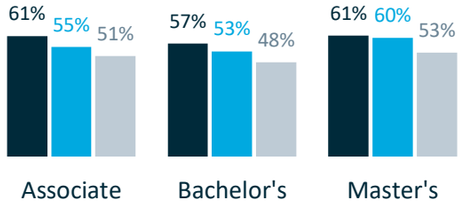
Actively considering/researching options

20s	30s	40+
70%	71%	60%

Prospects under age 40 are most likely to be actively considering/researching their educational options.

Though online education is preferred by all ages, prospects under 40 are more willing to consider in-person and hybrid options. Prospects under 40 are also have greater interest in degree options.





BARRIERS TO EDUCATION

Though cost is a concern for prospects of all ages, those in their 20s have especially felt the effects of COVID-19 through layoffs. In addition to cost, prospects under 40 cite workload and schedules, limited free time, and lack of childcare as barriers. Those 40+ view their age as a barrier.

	20s	30s	40+
Laid off as a result of COVID-19	33%	27%	20%
Cost/lack of financial aid is a barrier	45%	45%	47%
Workload/schedule is a barrier	36%	30%	26%
Limited free time is a barrier	35%	33%	25%
Limited childcare is a barrier	21%	21%	12%
Age is a barrier	21%	21%	31%

DESIRED BENEFITS AND OUTCOMES

Career changers in their 20s more likely to cite a desire to earn more money, have a more consistent paycheck, and have more control over their workload/schedule. Those in their 20s are also are more likely be seeking education to increase their industry knowledge and are more likely to view gaining understanding different viewpoints as a benefit. Meanwhile those 30+ are more likely to cite gaining computer skills as a benefit.

	20s	30s	40+
Change careers to earn more money	76%	66%	60%
Change careers to have amore consistent paycheck	41%	38%	28%
Change careers to have control over workload/schedule	40%	38%	23%
Important to increase industry knowledge	45%	38%	29%
Understanding different viewpoints as a benefit	22%	15%	14%
Computer technology skills as a benefit	27%	34%	35%

BIPOC* Prospective Adult Learners

37% of respondents

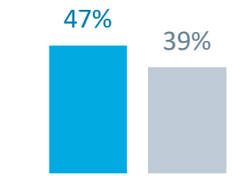
INTEREST IN ADDITIONAL EDUCATION

Somewhat/very likely to begin bachelor's degree

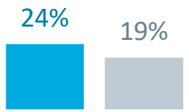
56%	49%
BIPOC	White

Prospective BIPOC adult learners are more likely than white prospects to begin a bachelor's degree in the next 2 years.

COVID-19 has decreased interest in pursuing in-person instruction more among BIPOC prospects than white prospects, and BIPOC prospects are more likely to cite lack of in-person options as a barrier.



Interest has decreased because of COVID-19



Lack of in-person instruction is a barrier

Small classes, stackable credits, and diversity are more important to BIPOC prospects.

	BIPOC	White
Small class sizes	27%	20%
Stackable credits	21%	10%
Diverse student body	19%	10%

COST AS A BARRIER TO EDUCATION

Nearly half of adult prospects cite cost as a barrier, and this holds true regardless of race or ethnicity. But BIPOC prospects are more likely to have felt the financial impacts of COVID-19 and are more likely to cite an unstable economy as a barrier. Regardless of race, 4 in 10 prospects are seeking additional education to change career fields. But BIPOC respondents are more likely to cite a consistent paycheck as a reason for changing careers.

	BIPOC	White
Cost/lack of financial aid is barrier	45%	47%
COVID-19 has had negative impact on employment or income	52%	45%
Unstable economy is a barrier	31%	25%
Want to change career fields for more consistent paycheck	42%	30%

DESIRED BENEFITS AND OUTCOMES

BIPOC career changers are more likely than white prospects to cite a desire to do work that helps people. In addition, BIPOC prospects are more likely be seeking education in order to grow a business and are more likely to cite gaining soft skills and becoming more competitive as benefits of education.

	BIPOC	White
Change careers to do work that helps more people	42%	30%
Seek education in order to grow a business	37%	28%
Gaining soft skills is a benefit	32%	25%
Becoming more competitive is a benefit	39%	34%

*BIPOC: black, indigenous, and people of color

Methodology

Methodology Overview

	Prospective Adult Students (LinkedIn Members)	Prospective Adult Students (Non-LinkedIn Members)
Geographic Distribution	National Sample: Controlled for distribution across Northeast, South, Midwest, and West, as well as between rural and urban areas.	
Margin of Error	+/- 3.67%	+/- 3.99%
Completed Surveys	687	586
Total Sample Size	1,233	
Data Collection Period	August 27 – September 3, 2020	
Method of Data Collection	Online Survey	

Sampling Frame —

- Adults ages 25-55 nationwide, interested in furthering their education in the next two years
- Current education level is less than a professional/ doctorate degree

This study is powered by InnovateMR.

Profile of Respondents — Prospective Adult Students 1,233 Respondents

Gender Identity	
Man	47%
Woman	52%
Non-Binary	1%
Prefer to self-describe	0%
Prefer not to answer	0%

Age	
20s (25-29)	20%
30s (30-39)	43%
40s or older (40-55)	37%

Race/Ethnicity	
White	69%
Hispanic, LatinX, or Spanish origin	12%
Black or African American	16%
Asian	8%
Another race or ethnicity	1%

Income	
Less than $10,000	7%
$10,000 to $24,999	10%
$25,000 to $49,999	26%
$50,000 to $74,999	21%
$75,000 to $99,999	15%
$100,000 to $199,000	17%
$200,000 to $299,999	3%
$300,000 to $499,999	0%
$500,000+	0%
Prefer not to answer	0%

Profile of Respondents — Prospective Adult Students 1,233 Respondents

Geographic Region	
Northeast	21%
South	42%
Midwest	18%
West	19%

Type of Region	
A suburb near a large city	34%
A large city	29%
A small city or town	21%
A rural area	16%

Highest Level of Education	
Less than high school diploma/GED	2%
High school diploma/GED	18%
Some college/no degree	22%
Associate degree	14%
Bachelor’s degree	28%
Master’s degree	15%

On behalf of our Alexandria, Oakland, and Columbus offices,

Thank you.

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