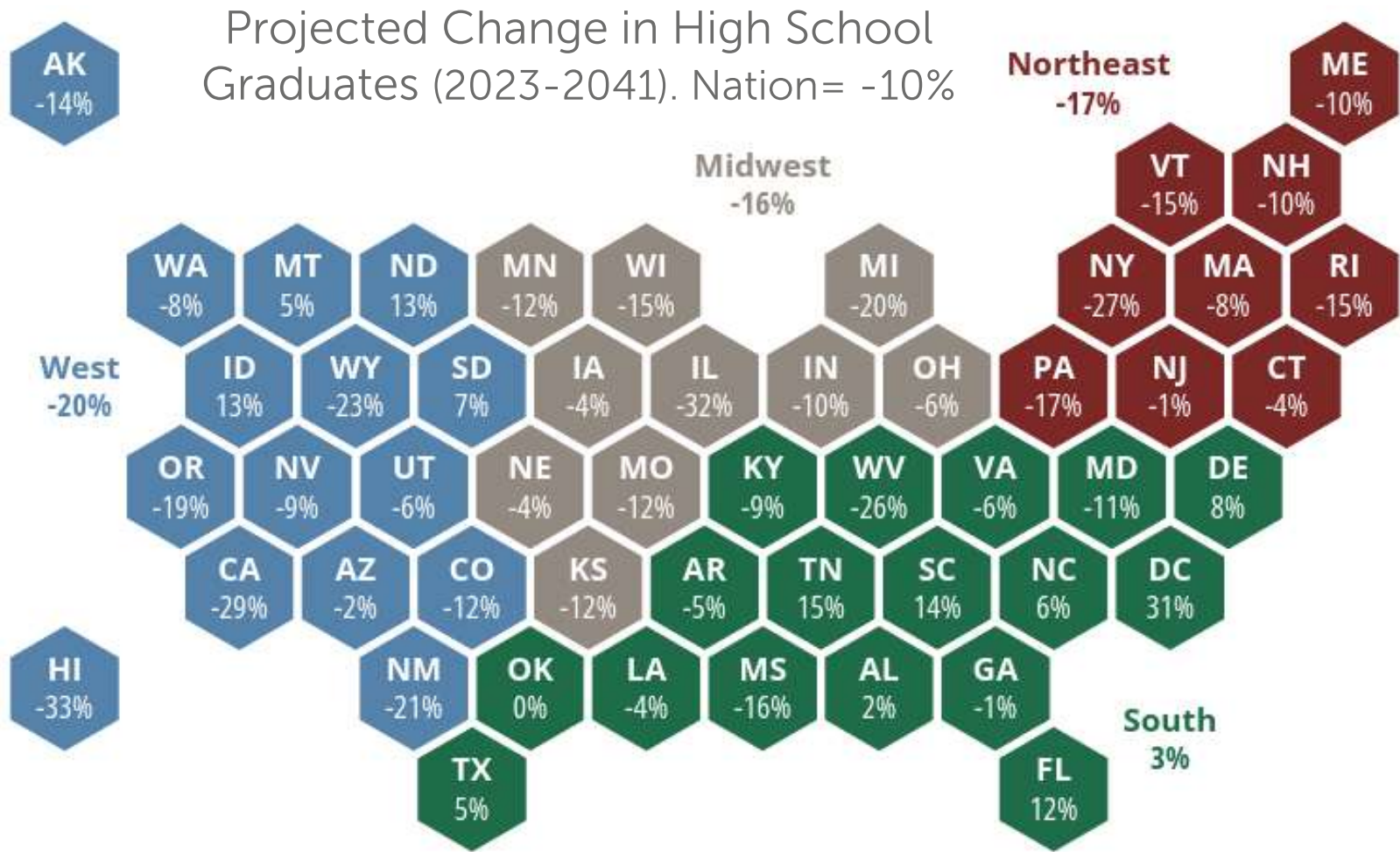




# No Degree, No Problem- Winning Back Adult Learners



# Why adult learners matter



## Big market opportunity

### High School Graduates

(2023 vs. 2041F)

-10%

3.9m (2025)

3.4m (2041P)

### Adults Aged 25-44 without Bachelor's

(2023 vs. 2041F)

+5%

45m (2025)

47m (2041P)

# Four Big Questions

What is the health of the adult undergraduate market?

Are adults opting for college alternatives?

Which schools appeal to adult undergraduates?

What does the future hold?







# Take a Practice Test

Prepare for your math placement test with our online practice test.

[Download Practice Test Questions](#) →





A Bachelor of Arts in humanities is interdisciplinary and comprehensive, allowing students to explore various topics within the social sciences. Faulkner University, located in Montgomery, Alabama, provides students with a diverse array of online courses that range from philosophy and literature to art history and foreign languages.



## NEW FAU DEGREE PROGRAMS TARGET WORKING PROFESSIONALS

April 14, 2022

Florida Atlantic University is launching four new master's degree programs for working professionals, including an expansion of the state's first Master of Science with Major in Artificial Intelligence (AI).





The **Post Graduate Diploma in Education** is an in-service programme for secondary school teachers, offered through the University of the West Indies (UWI).

This programme is targeted towards untrained, graduate teachers at the secondary and tertiary levels of the education system.

Its curriculum ensures the development of participants' pedagogical knowledge, teaching competence, and personal qualities.



**THE UNIVERSITY  
OF THE  
WEST INDIES**

# Online Student Experience

## Flexibility to learn wherever you are

The George Washington University (GW) brings innovation to you with world-class programs geared toward helping you find a rewarding career in fields like clinical research, medical laboratory sciences, and healthcare management.

Our flexible programs, which are offered 100% online or as hybrid with online coursework with in-person requirements, allow you to advance your career on your own schedule, wherever you choose to learn. For Health Sciences Programs online courses, you will need to









# WISDOM TEETH REMOVAL

Are you looking for wisdom teeth removal in Palmdale, CA? Wisdom teeth can cause severe discomfort and even infection if left untreated. At AV Sierra Dental Center, our experienced professionals offer wisdom teeth removal in Palmdale, California. We provide quality care with minimally invasive techniques that help you recover faster and with fewer complications.

Our team will ensure you receive the best treatment at every step of the process! With us on your side, we'll ensure your procedure is safe, comfortable, and as stress-free as possible! Plus, thanks to advanced technology, we can plan an effective strategy that fits each patient

**New Patients** ↗



What if [there was] a natural resource that could create thousands of jobs, unlock individual prosperity, and produce an infusion of talent to power economic growth?

This economic super fuel may be the tens of millions of Americans who started college but never finished.

**Beverly E. Perdue, Former Governor of North Carolina, and Pete Wheelan, CEO of InsideTrack (2016)**

The untapped potential of 'some college, no degree', The Hill (8 December 2016)

# “Tapping the potential of adult learners requires a new paradigm...”

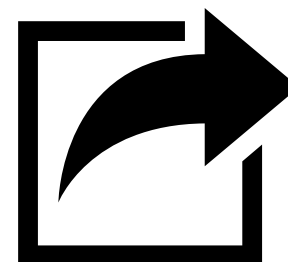
Dedicated  
Recruitment



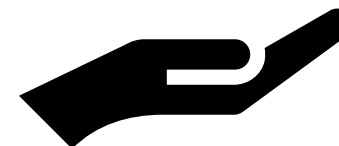
Cost  
& Aid



Simple  
Transfer

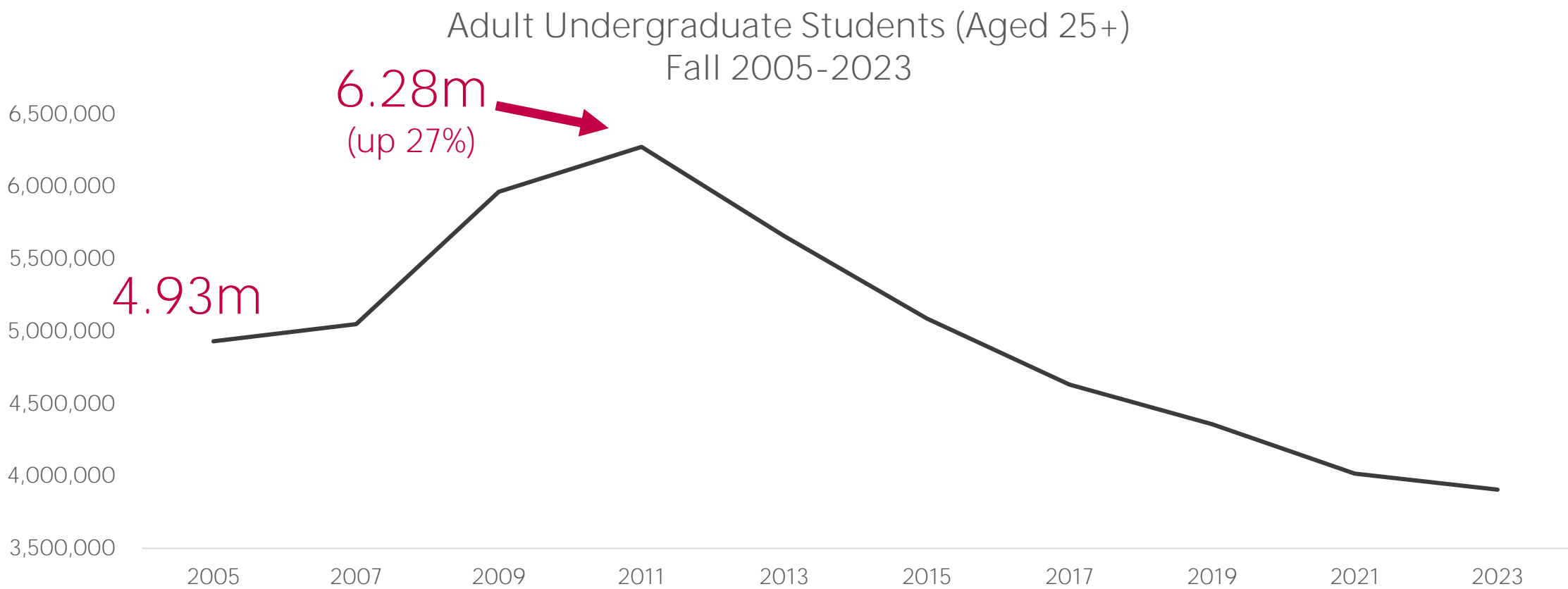


Targeted  
Support

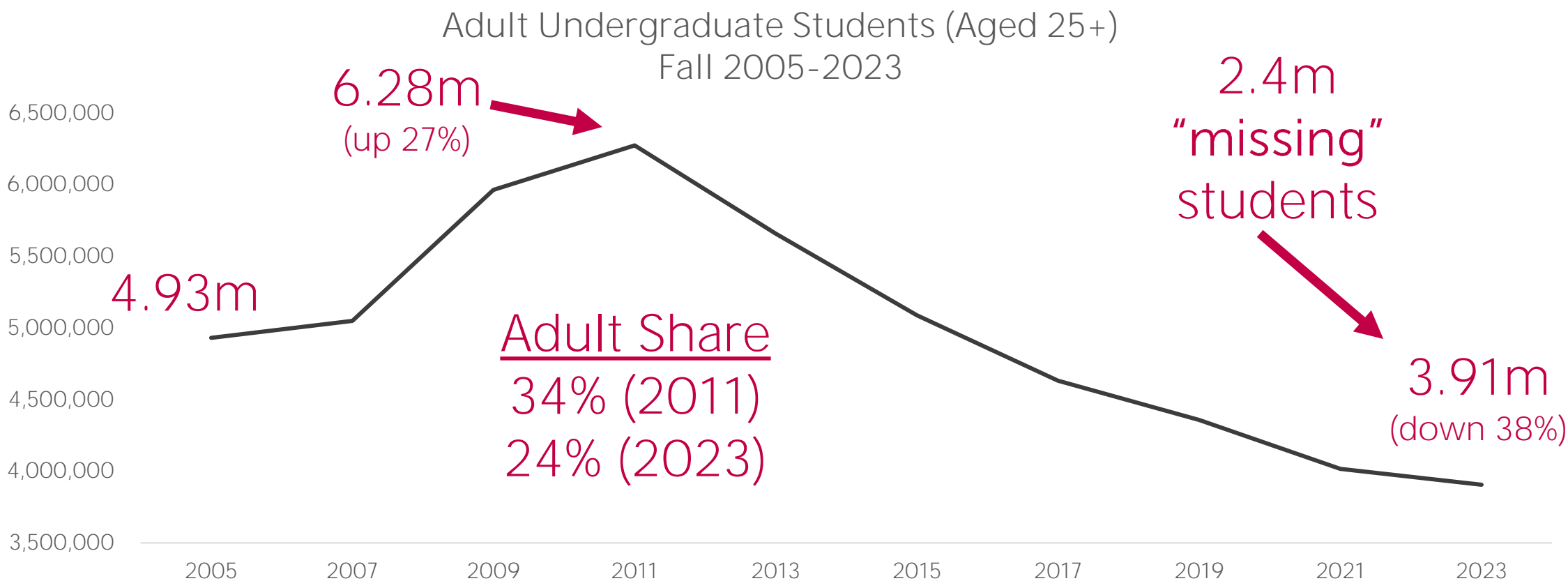




# Well actually... adult undergraduate enrollment collapsed



# Well actually... adult undergraduate enrollment collapsed

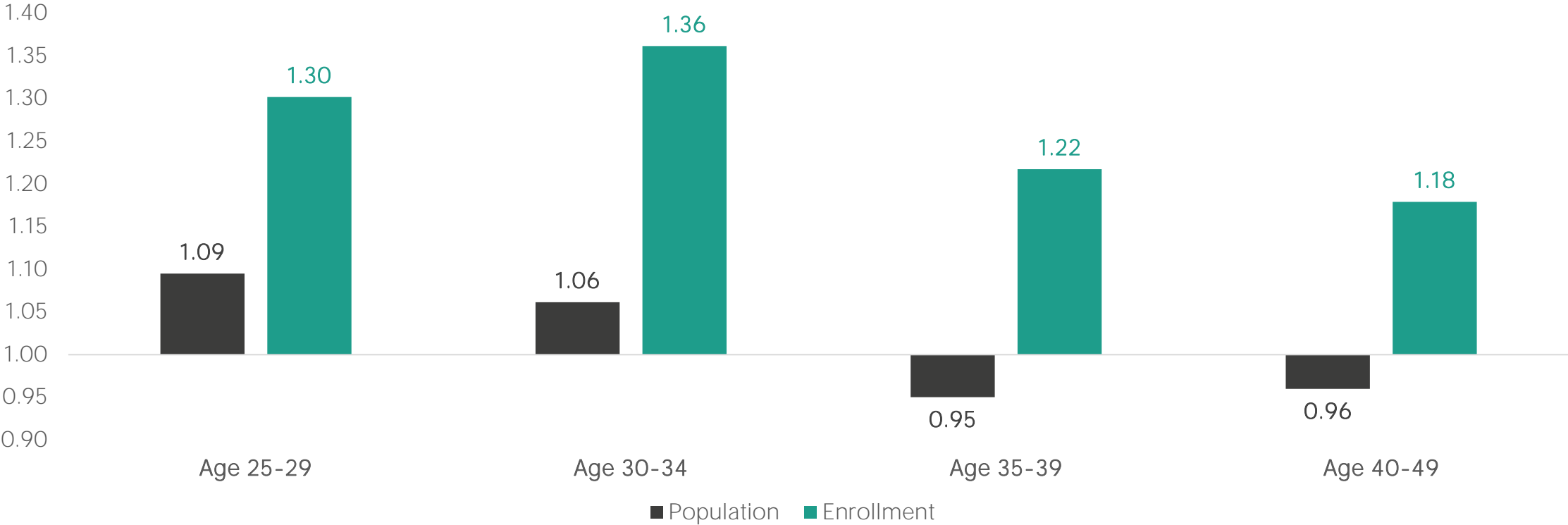


Why did adult enrollment  
undergraduate collapse?



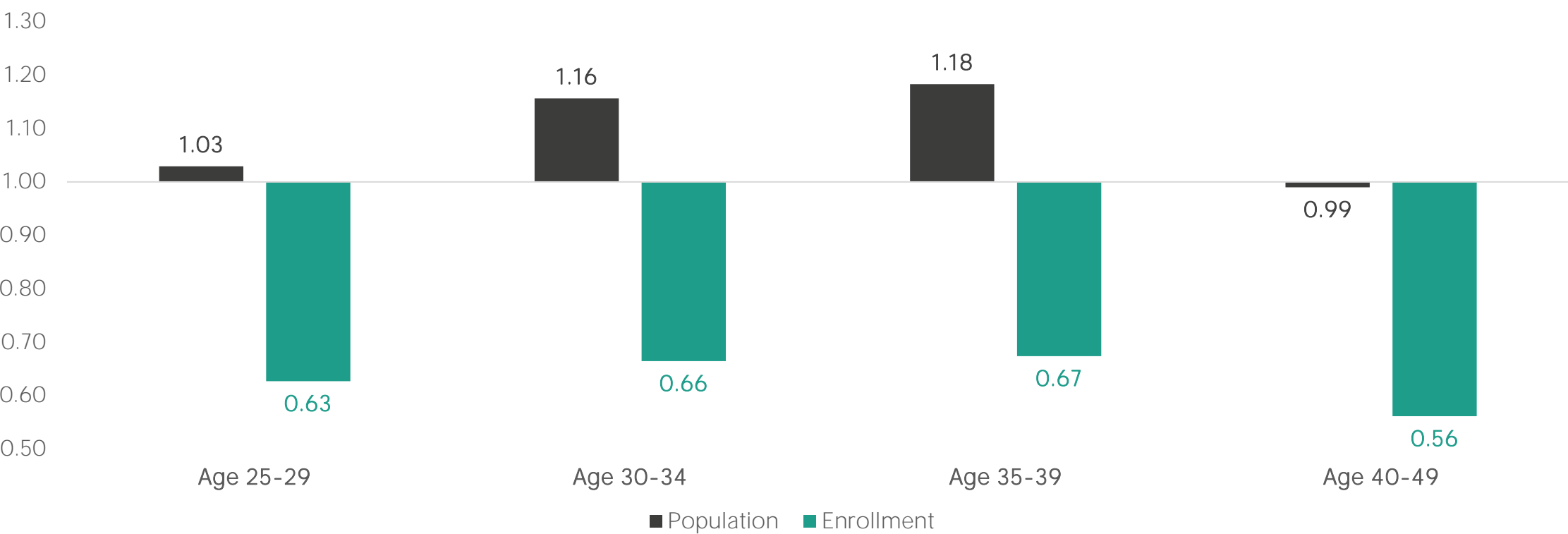
# GROWTH PERIOD: population flat but enrollment up c.25%

Population vs. Enrollment (2011 vs. 2005) by Age Segment



# DECLINE PERIOD- population up c.10%, enrollment down 1/3

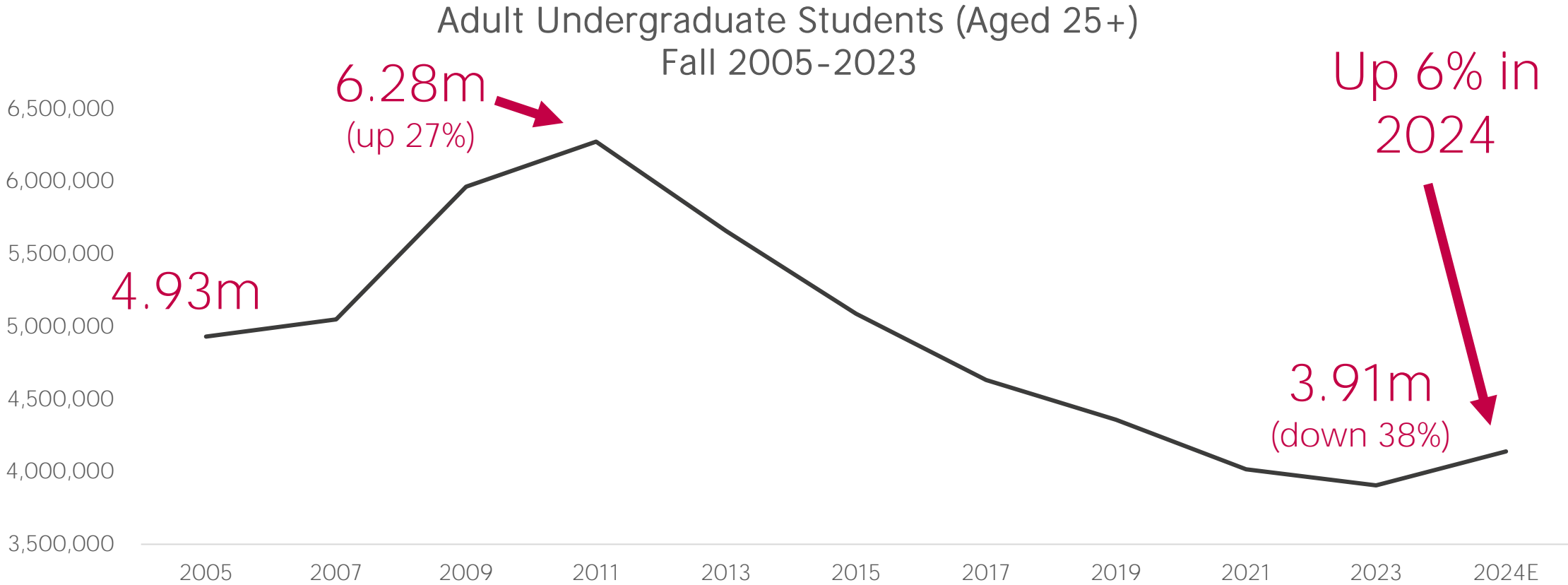
Population vs. Enrollment (2023 vs. 2011) by Age Segment



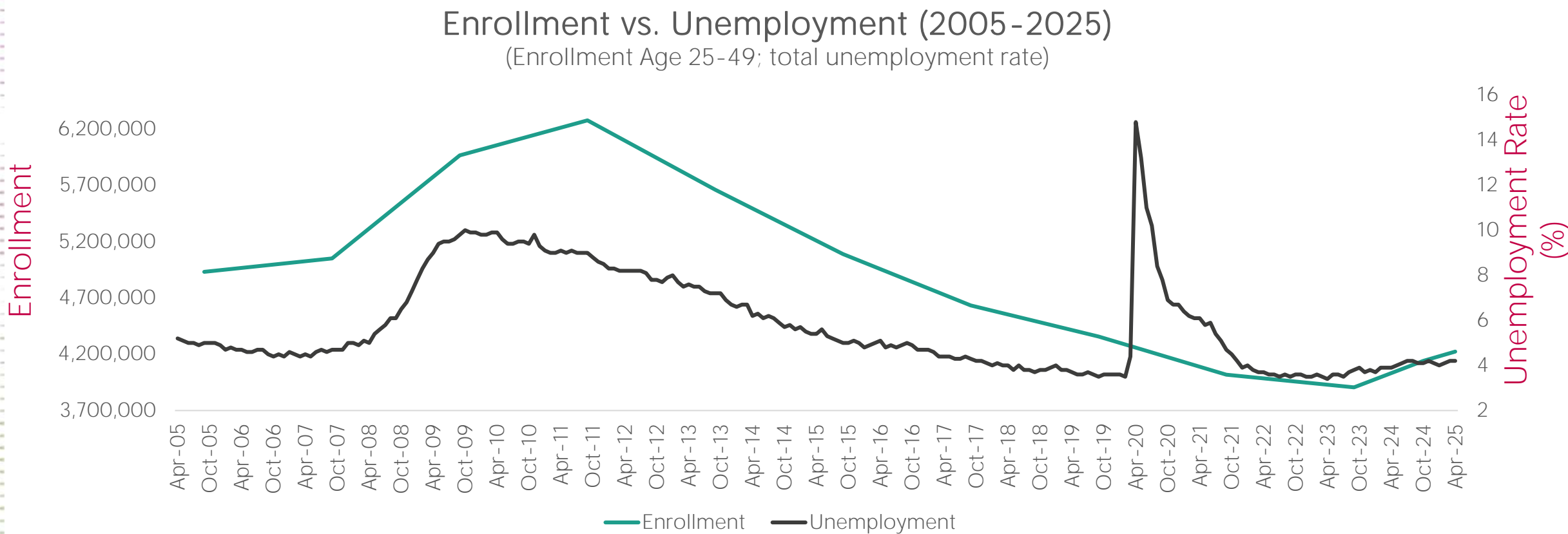




# Turnaround?



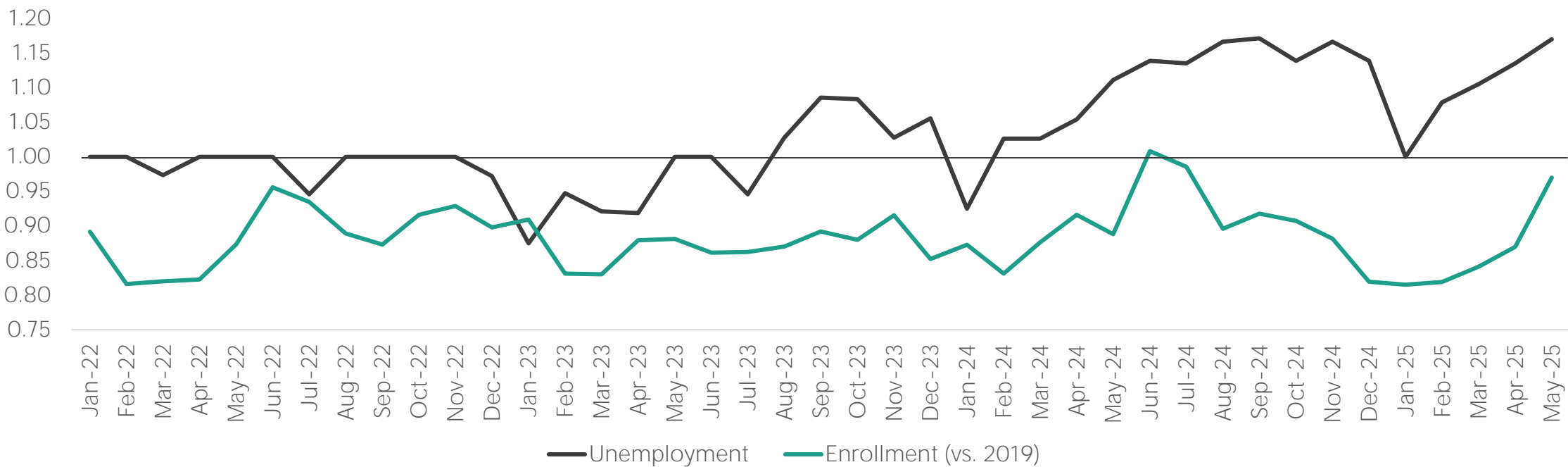
# WHAT ABOUT UNEMPLOYMENT? Much clearer relationship



# RECENT UNEMPLOYMENT: why did the gap widen?

Enrollment Rate vs. Unemployment Rate- by month (Jan 2022-April 2025)  
(vs. same month in 2019) Enrollment Age 25-44 with at least a high school diploma but no bachelor's degree; total unemployment rate)

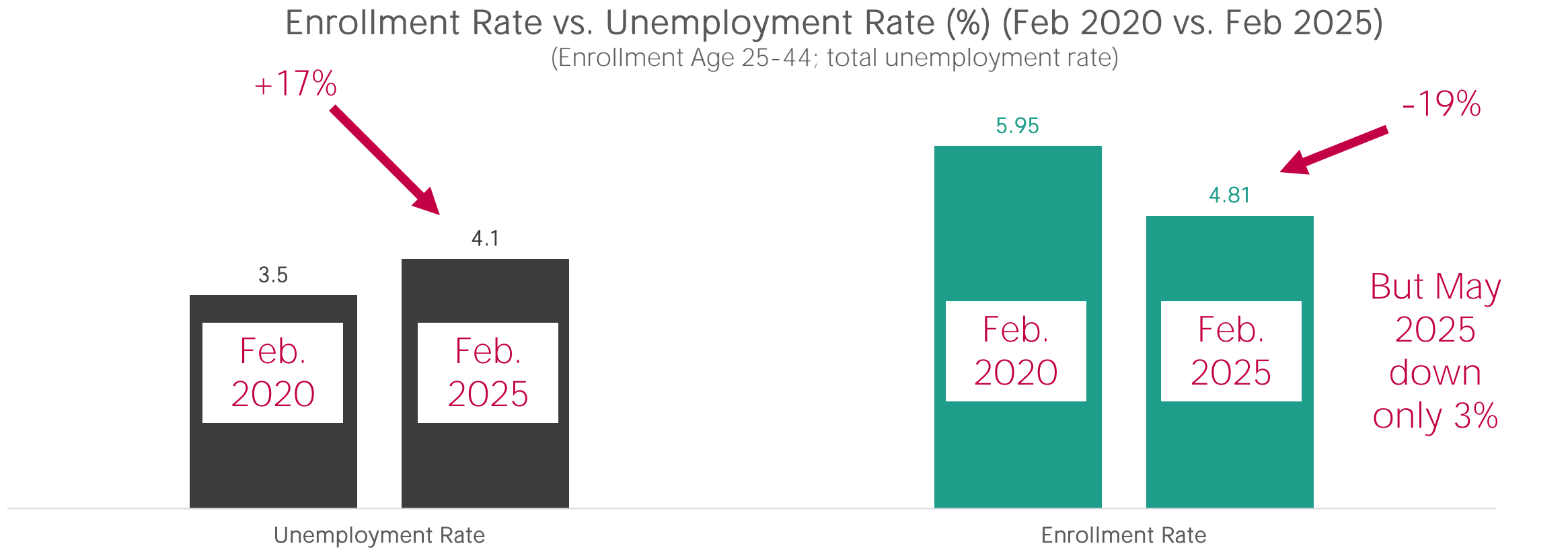
Enrollment & Unemployment Rate  
(vs. same month in 2019)



— Unemployment — Enrollment (vs. 2019)



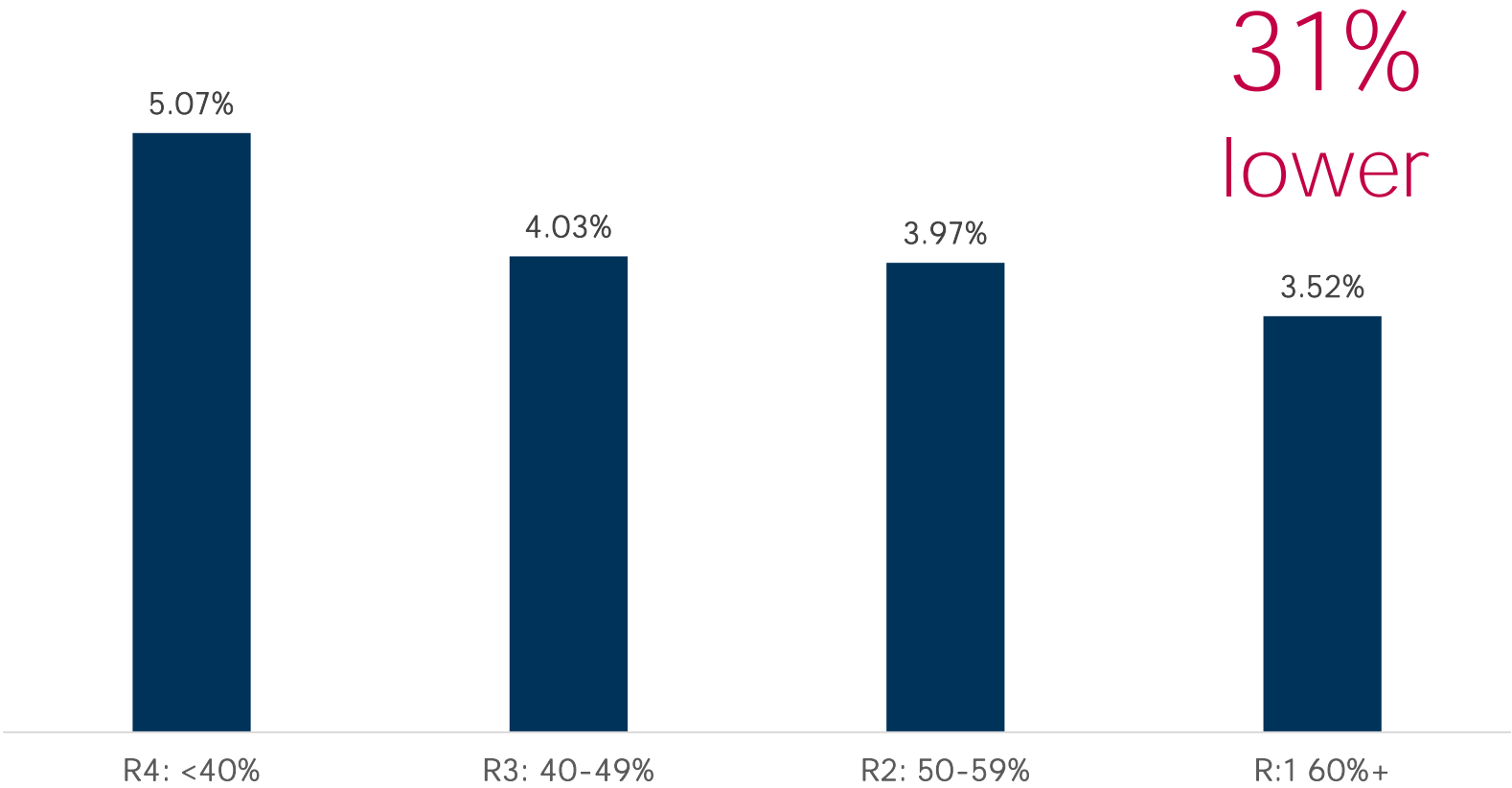
# Unemployment is up but adult enrollment is down???



# What about politics?

- Average income: almost identical
- Similar ER gap a decade ago (but less marked)
- State of the economy: much more influential
- Low ER in rural/small town America (regardless of politics)

Adult Enrollment Rate by County GOP Vote % in 2024 Election  
(age 25-44 high school diploma but no bachelor's degree; enrollment 2023-25)











Idk-college •• 5min  
ago

I would recommend careers  
with a physical presence  
that can't just be done on a  
computer. That's why  
trades, nursing, trucking,  
aviation, etc are in demand  
😊

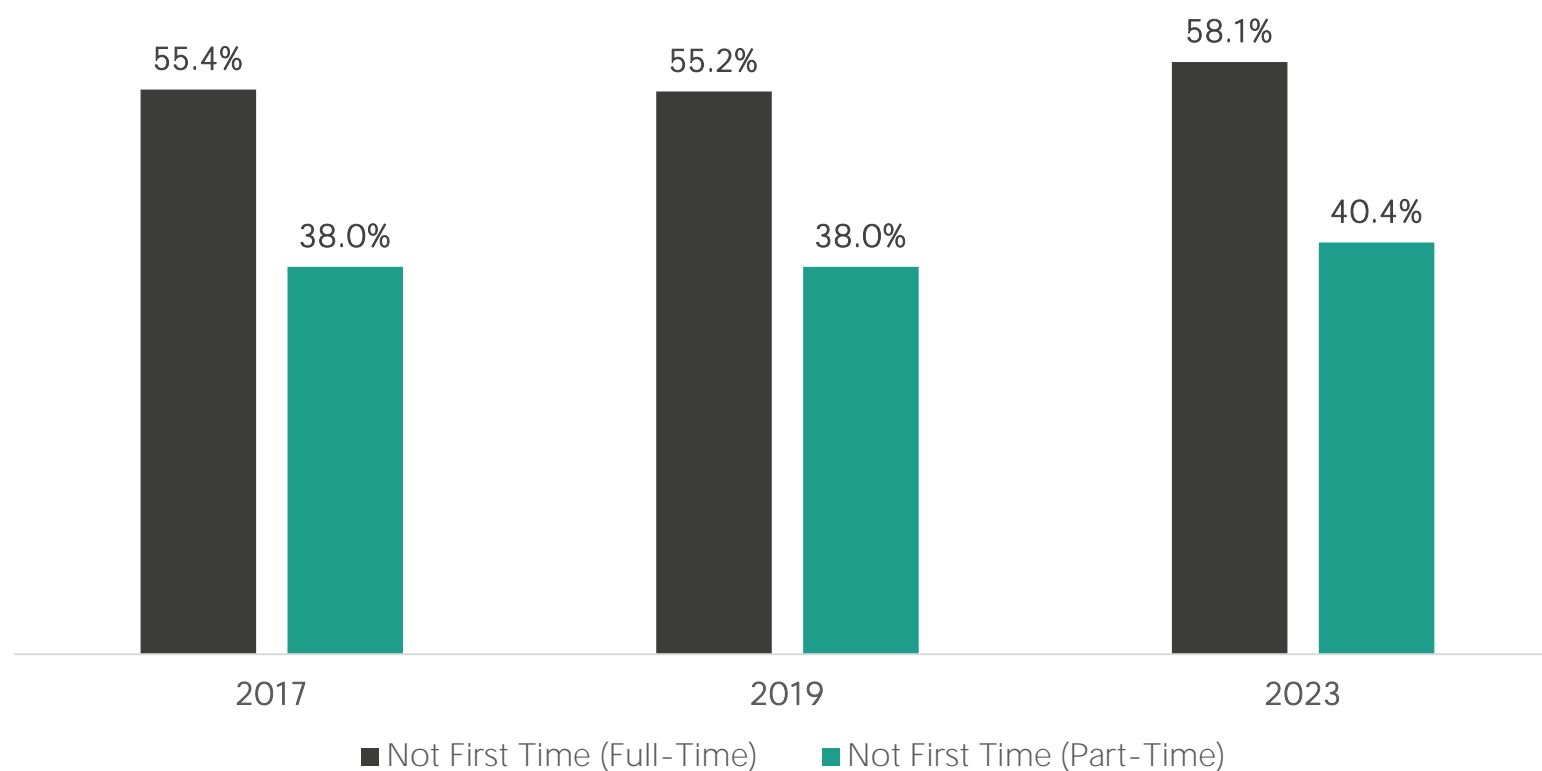


Are adults opting for college alternatives?



# Let's talk about outcomes...

## 8-Year Completion Rates for Adult Undergraduates (% receiving a credential from same institution)



But adult **bachelor's** degree attainment share up strongly:

- From **50%** to **69%** of credentials awarded (full-time students)
- From **17%** to **36%** (part-time)

# Evidence for Degree Alternative Enrollment Surge? Not too hard to account for 2.4 million “missing” adult students.

## No Evidence

- Noncredit enrollment at community colleges (e.g., CA flat 2018 vs. 2024)
- “Certification” attainment over past decade among non-degree adults- flat (Current Population Survey)
- Lumina reports declining non-degree share of attainment growth

## Some Evidence

- Growth in Registered Apprenticeship enrollment (up by almost 50% over past decade- +320,000)
- Google Certificates- c.250,000 U.S. completers since 2018 launch
- Undergraduate Certificates- awards up 30% (+120,000) since 2016

## Unclear Evidence

- Boom in non-degree enrollment on commercial platforms (e.g., Coursera, edX Pluralsight)- hundreds of millions of learners. Hard to parse by age, prior attainment, geography- but likely a scaled alternative

Source: CCCA, Current Population Survey (IPUMS), Lumina Foundation, Apprenticeship.gov, Google, National Student Clearinghouse, and Eduventures estimates.

# Benefits of “no college” not showing up in earnings

## Average Earnings for U.S. Adults Aged 25-44 (2017-24)

- High School Graduates= +30%
  - Some College= +35%
    - Associate= +35%
    - Bachelor's= +34%
    - Inflation= +28%
- Gap: Bachelor's & High School Grad= +96% (up from 89% in 2010)
  - Faster wage plateau for adults without a degree



Which colleges/universities  
have outperformed?

# Tough market

Top 20 Schools  
(adult market share)

11% (2011)  
(0.3% of schools)  
18% (2023)  
(0.4% of schools)

Schools >500 Adults  
(adult market share)

84% (2011)  
(45% of schools)  
76% (2023)  
(37% of schools)

Schools <250 Adults  
(adult market share)

5% (2011)  
(54% of schools)  
6% (2023)  
(62% of schools)





## Some predictable (and not-so-predictable) winners



+73%

(2023 vs.  
2019)



+31%



+97%



+178%



+3,000  
adults







Susie-#1-Adult-Learner  
1 min ago

Duh... pretty obvious: career programs, affordable, customer service, convenient, multiple starts!!??







# Implications for Higher Education Leaders



# Implications

*The same adult enrollment formula still works...*

But adult enrollment should be higher than it is

Same logic is driving prospects to degree alternatives

Good news for higher ed: wages still favor degrees

But where is the innovation?

# Welcome to the future...

Room for  
Creativity

Non-  
Degree  
Bias



Workforce  
Pell

# Welcome to the future...



Sounds like  
college...



Who needs  
institutions?

All  
Powerful?

# *What's Next?*

(Healthy) rebalancing of degree and non-degree

*AI furthers "convenience" logic AND raises human premium*

*Enduring relevance of "college" fundamentals*

*Leverage AI to free up time to focus on what AI can't do*

Openings for shorter, applied, stackable degrees







Q&A