



How to Increase Enrollment By Better Understanding Prospective Graduate Students

Kevin Shriner, EdD

Director, Strategic Leadership, EAB Adult Learner Recruitment

Maribeth Watwood, PhD

Dean, Graduate College, Northern Arizona University

Northern Arizona University in Brief



NORTHERN ARIZONA UNIVERSITY



A public research university in Flagstaff, Arizona with a total enrollment of 31,000 students

NAU Graduate College

- 125 graduate degree and certificate programs
- 3,995 students enrolled
- \$3M in graduate assistantship and tuition waiver funding

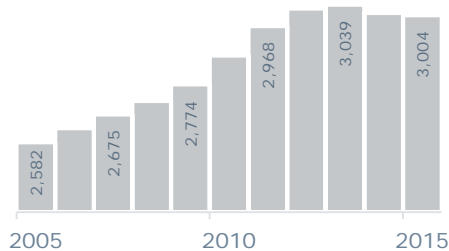


- 1 **A Pivotal Moment in Graduate Enrollment**
 - 2 Understanding the Shifting Adult Learner Mindset
 - 3 Designing Graduate Programs for Growth
 - 4 Break
 - 5 Interactive Diagnostic Activity
 - 6 Conclusion and Q&A
-

An Increasingly Challenging Landscape

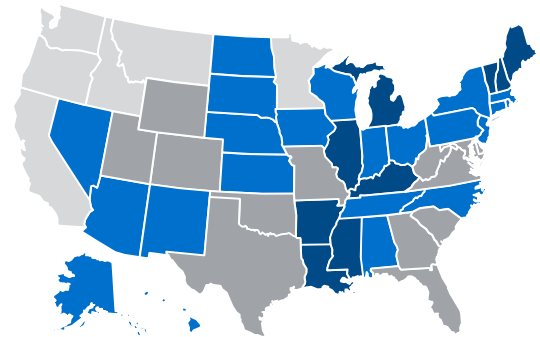
College Capacity Has Grown...

Total 4-Year Degree-Granting Institutions



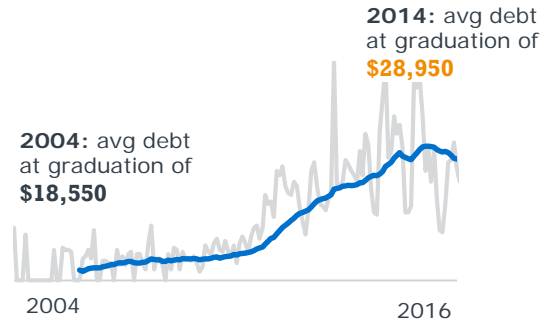
...With Far Fewer Students on the Horizon

Projected Decline in Students Attending Regional Four-Year Colleges and Universities, 2017-2029



...Amid Growing Doubt Over Value...

Google searches for: **"Is College Worth It?"**



Regional:

Research universities & liberal arts colleges ranked outside of Top 100 (USNWR rankings)

- 0% to 10% growth
- 1% to -9% decline
- 10% to -19% decline
- over -20% decline

Source: National Center for Education Statistics Integrated Postsecondary Education Data System (IPEDS), 2000-2016; Google Trends; Grawe, Nathan D., Demographics and the Demand for Higher Education, 2017; EAB data and analysis.

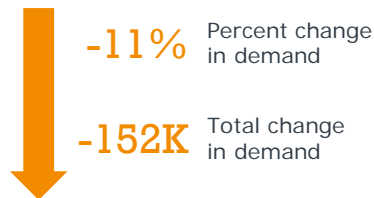
Anticipating “Winners” and “Losers”

Regional Institutions Have Just a Decade to Escape a Looming “Death Spiral”

Enrollment Outlook 2017-2029

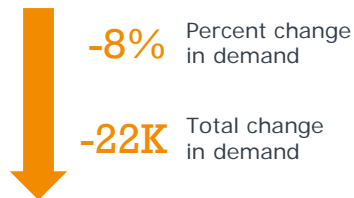
Regional Institutions

Research universities and liberal arts colleges ranked outside of Top 100 (USNWR rankings)



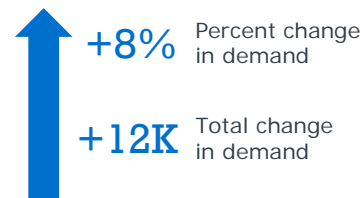
National Institutions

Top 50-100 research universities, Top 50-100 liberal arts colleges (USNWR rankings)



Elite Institutions

Top 50 research universities, Top 50 liberal arts colleges (USNWR rankings)



THE WALL STREET JOURNAL.

U.S. Colleges Are Separating Into Winners and Losers

February 2018

The First Signs...

28% of publics **43%** of privates

Percent of institutions that **missed enrollment and net tuition revenue goals in 2016**



Optimism in Master's and Online Programs

Programs Oriented Toward Older Students Will Continue to See Growth

Growth in Students Age 25-34
2007-2017, NCES

15%

All institutions

620K

Total students



Growth in Online-Only Students
2013-2017, EAB Research

47%

Public 4-years

42%

Private non-profit 4-
years

Growth in Master's Conferrals
2007-2017, NCES

25%

All institutions

160K

Total graduates

More Growth on the Horizon
NCES Projections Through 2026

11%

Projected growth
students age 25-34

22%

Projected growth
master's degrees



Tracking the Market EAB Research



10-25%

Recent increases in online
program **growth targets**

Provosts Considering Big Moves to Capitalize on the Opportunity

“We need to grow our professional and master’s programs to offset the pressure on undergrad net tuition. But it feels like we are behind.”

-Provost, Private University

“We are at \$50M in online tuition revenue. How do we get to \$100M?”

-Provost, Public Flagship

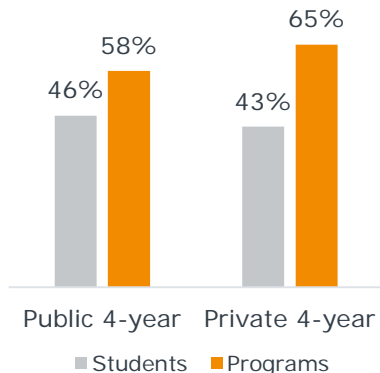


No Surprise, Added Competition for Students

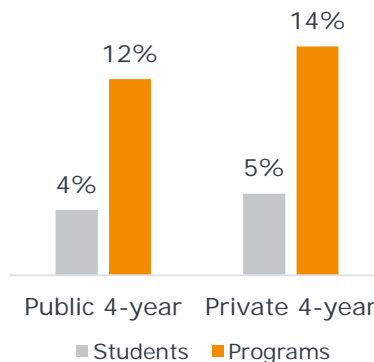
Program Growth Outpacing Student Growth, Driving Up Recruitment Costs

Growth in Graduate Programs vs. Students

Online Graduate
2013-2017, EAB Research



Ground-Based Graduate
2013-2017, EAB Research



**Explosive Program
Growth Wreaking Havoc
on Recruiting Expenses**



226%

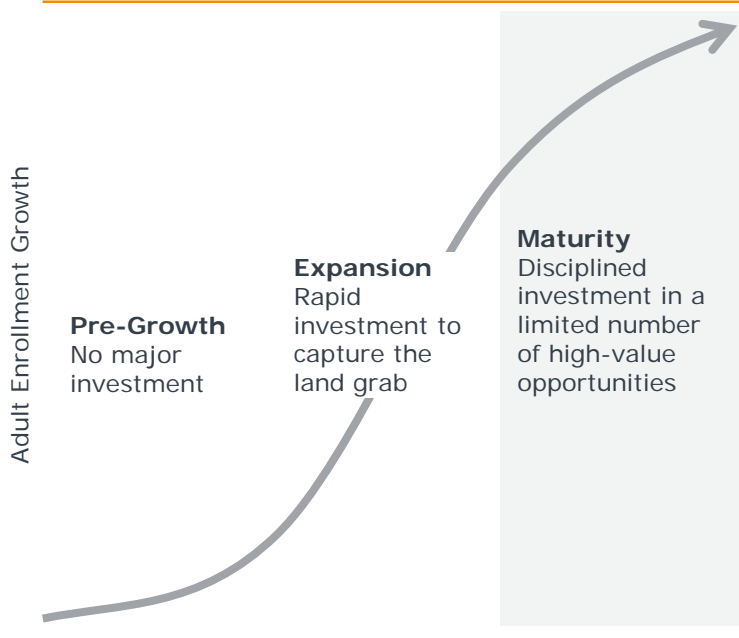
Increased **cost per click** for
graduate programs from 2009-2014

Prioritizing and Designing Programs for Growth



A Maturing Adult Market Demands a Strategic Approach to Growth

Entering the Era of Smart Growth



Adapting to Smart Growth

Tough Questions Leaders Must Answer

- ? What current programs have growth potential?
- ? How do we design our programs to be competitive in the market?
- ? What are the best areas for new expansion?
- ? How do we develop a sound online strategy?

1

A Pivotal Moment in Graduate Enrollment

2

Understanding the Shifting Adult Learner Mindset

3

Designing Graduate Programs for Growth

4

Break

5

Interactive Diagnostic Activity

6

Conclusion and Q&A

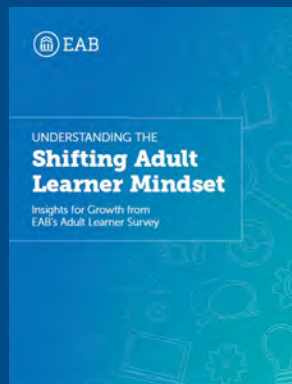
EAB's Survey of Current and Prospective Adult Learners

How We Defined “Adult Learners”

- ▶ Current and prospective students of graduate, undergraduate degree completion, online, and certificate programs¹

Why We Conducted This Research

- ▶ To help institutional leaders better understand the perceptions, motivations, and behaviors of today's adult learners



1) Students considering or currently enrolled in graduate programs comprised 69% of all survey respondents.

Understanding How Adult Learners Think



12

Sample Questions Explored



What **motivates** adult learners to apply and enroll?



What **factors** do adult learners value when **choosing** programs?



What **prevents** interested students from applying?

Today's Discussion: Three Key Themes That Emerged

- 1 Adult learners require a **return on their education**.
- 2 Adult learners are **extremely pragmatic**.
- 3 Adult learners **require flexible options**.

Theme #1

Adult learners require a
return on their education.



A Climate That Drives Cost Consciousness

Influenced by the Student Loan Crisis and a Strong Economy

Student Debt Looms Large in Public Discourse

\$1.5 trillion

Dollars owed in US student loan debt

THE WALL STREET JOURNAL.

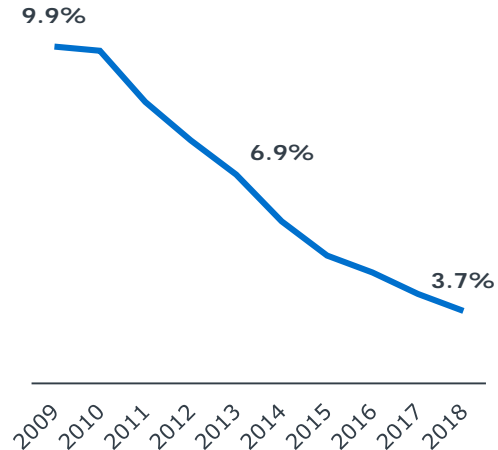
Nearly 5 Million Americans in Default on Student Loans
December 2017

The New York Times

I'm a Doctor and Even I Can't Afford My Student Loans
August 2018

While School Becomes Less Appealing with Strong Employment Options

US Unemployment Rate, November 2009-November 2018



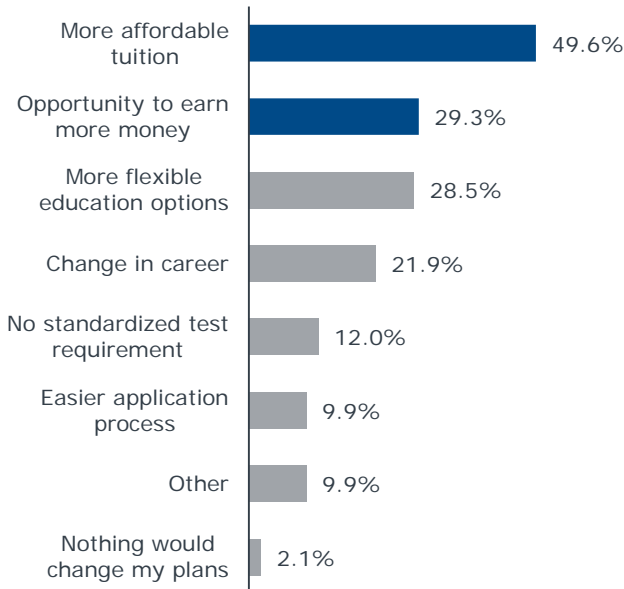
Sources: <https://www.wsj.com/articles/nearly-5-million-americans-in-default-on-student-loans-1513192375> <https://www.nytimes.com/2018/08/20/opinion/medical-school-student-loans-tuition-debt-doctor.html>, <https://data.bls.gov/timeseries/LNS1400000>.

Cost Is the Top Barrier to Enrollment

Responses from Students Without Immediate Plans to Enroll

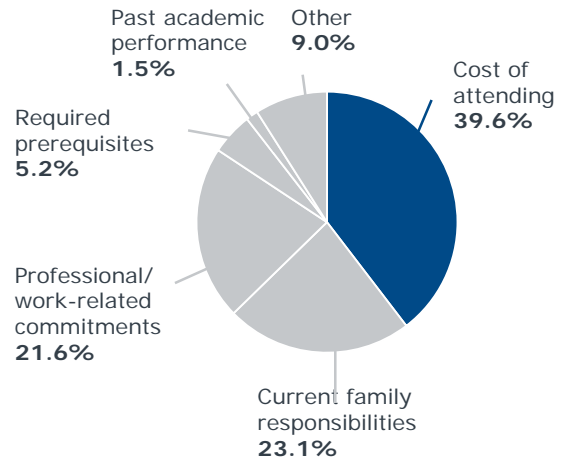
Students Who Are Not Planning to Enroll in Adult Learner Programs within Two Years

Q: What, if anything, would change your plans?



Students Who Are Undecided or Open to Enrolling at Some Point

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



Finances Influence Where Students Enroll

Responses from Students Who Plan to Enroll or Who Are Currently Enrolled

Which Factors Are Most Important in Students' Enrollment Decisions?

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

Most Important Factors	Mean
Program accreditation	4.32
Cost of attending	4.08
Financial aid/scholarships	3.82

Least Important Factors	Mean
Physical facilities	2.82
No prerequisites to enroll in the program	2.72
Size of the school	2.44

Students Prefer Lower-Tuition Options

69%

of participants considered public institutions

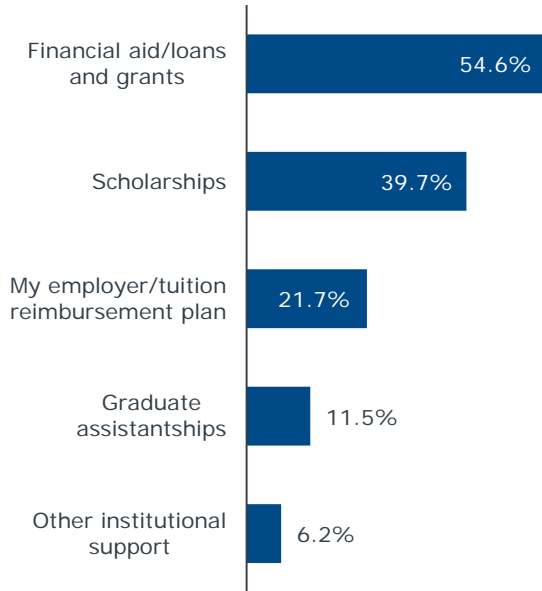
vs.

41%

of participants considered private institutions

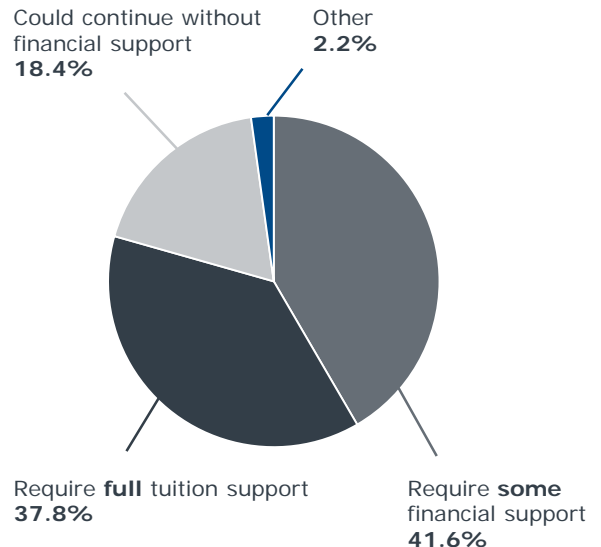
Adult Learners Rely Heavily on Financial Aid

Share of Students Receiving Institutional or Employer Support



Many Adult Learners Are Reliant on Institutional Support

Students Currently Receiving Financial Aid and/or Grants from Their Institution

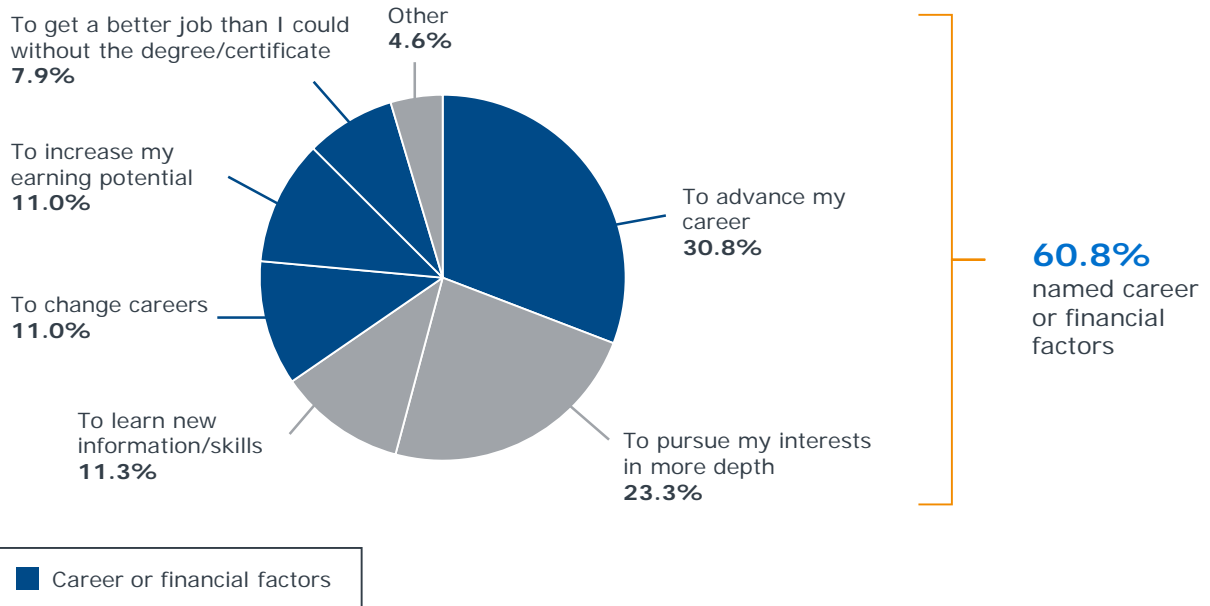


The Flip Side: Career and Finances as Motivators



Interest in Education Is Primarily Driven by Career and Finances

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



Implications and Campus Perspective

**NORTHERN
ARIZONA
UNIVERSITY** 



Theme #2

Adult learners are **pragmatic**.



Concerns about Value and Time Lead to a Pragmatic Approach



Uncertain About Value of Enrolling

"What if I get to the end of the application process and decide not to enroll anywhere?"



Pressed to Find the Time to Apply

"How will I find time to finish my applications while I'm working full-time and taking care of my family?"



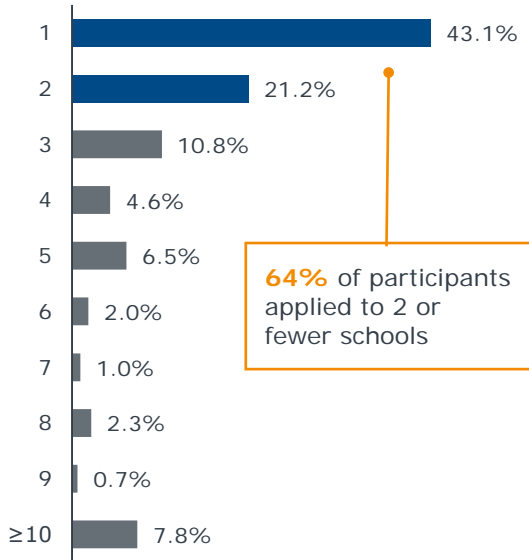
Approaching the Application Process Strategically

"How can I make sure I'm not wasting time on unnecessary tasks?"

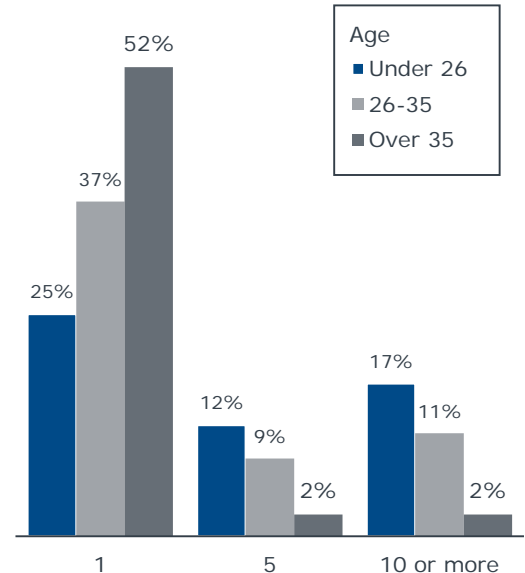
Most Adult Learners Are Applying to <3 Schools

The Number of Schools Applied to Decreases by Age

Number of Schools/Programs Applied To



Younger Prospects Tend to Apply to More Schools

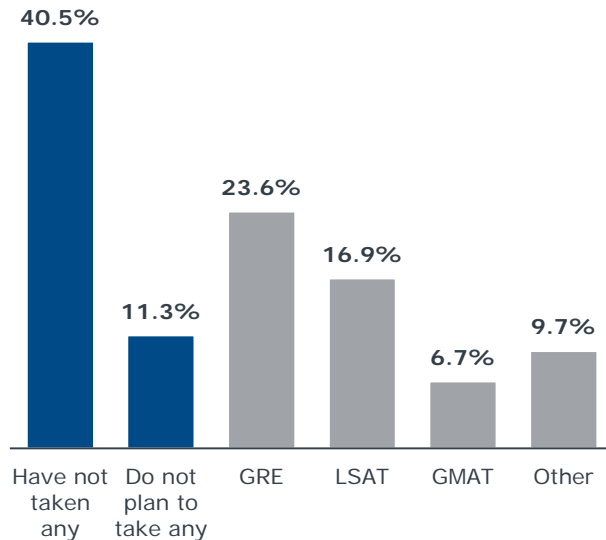


A Downward Trend in Test-Taking

Fewer Prospects Are Taking Admissions Tests Now Than Were Previously

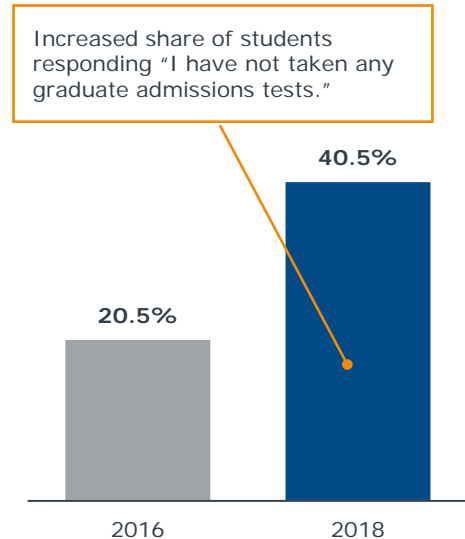
Four in Ten Adult Learners in 2018 Hadn't Taken an Admissions Test

Participants Who Planned to Enroll or Were Currently Enrolled



A Decrease in Test-Taking Since 2016

EAB 2016 Survey vs. EAB 2018 Survey

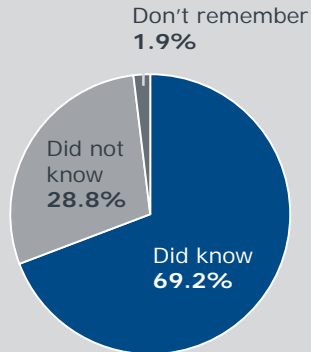


Increased share of students responding "I have not taken any graduate admissions tests."

Approaching Tests with a Plan in Mind

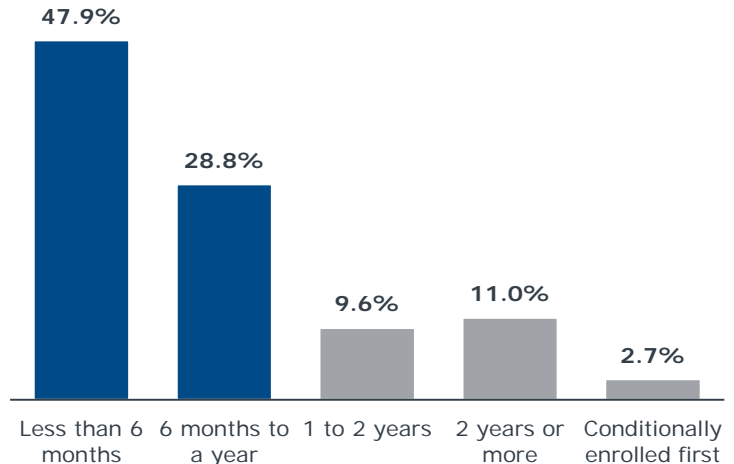
Test-Takers Have Researched Options and Tend to Enroll Within One Year

Most Students Knew Where They Would Apply Before Taking a Test



Over 75% of Students Enrolled Within One Year of Taking an Admissions Test

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



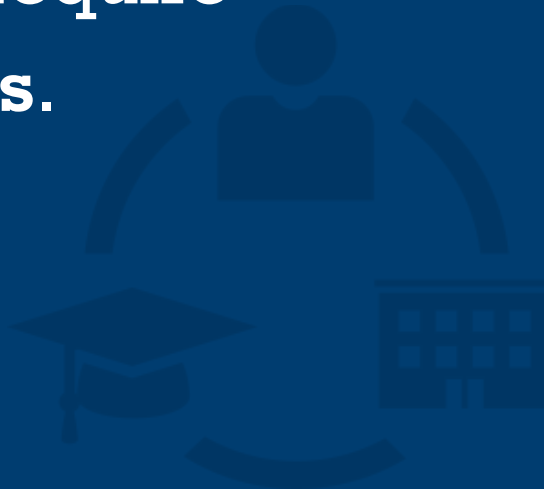
Implications and Campus Perspective

**NORTHERN
ARIZONA
UNIVERSITY** 



Theme #3

**Adult learners require
flexible options.**

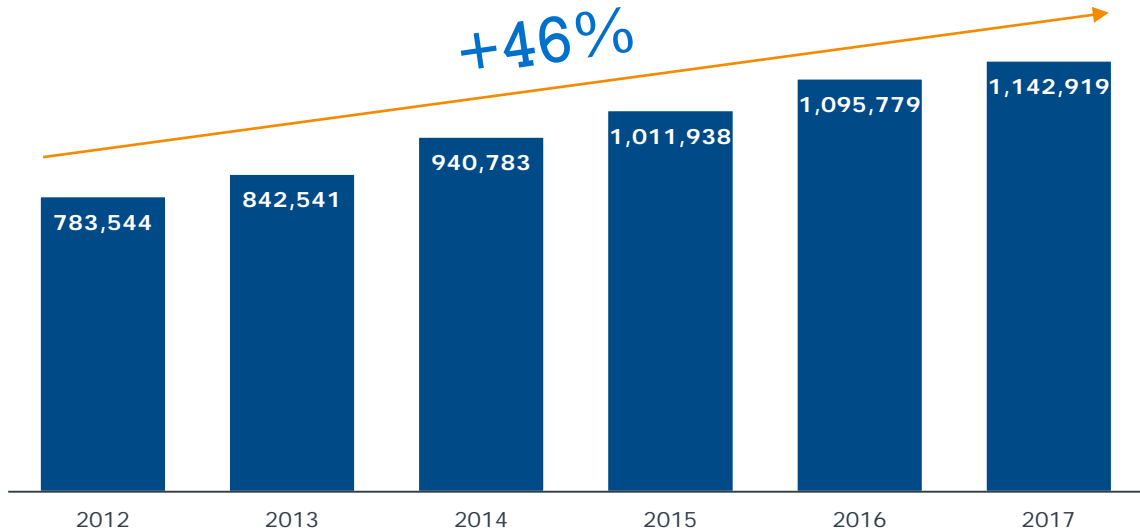


Students Increasingly Embracing Online Options

Online Needed to Appeal to Adult Learners in Today's Competitive Market

Graduate Students Enrolled in at Least One Distance Course

Fall 2012-2017, Degree-Granting, Title IV Participating, US Institutions

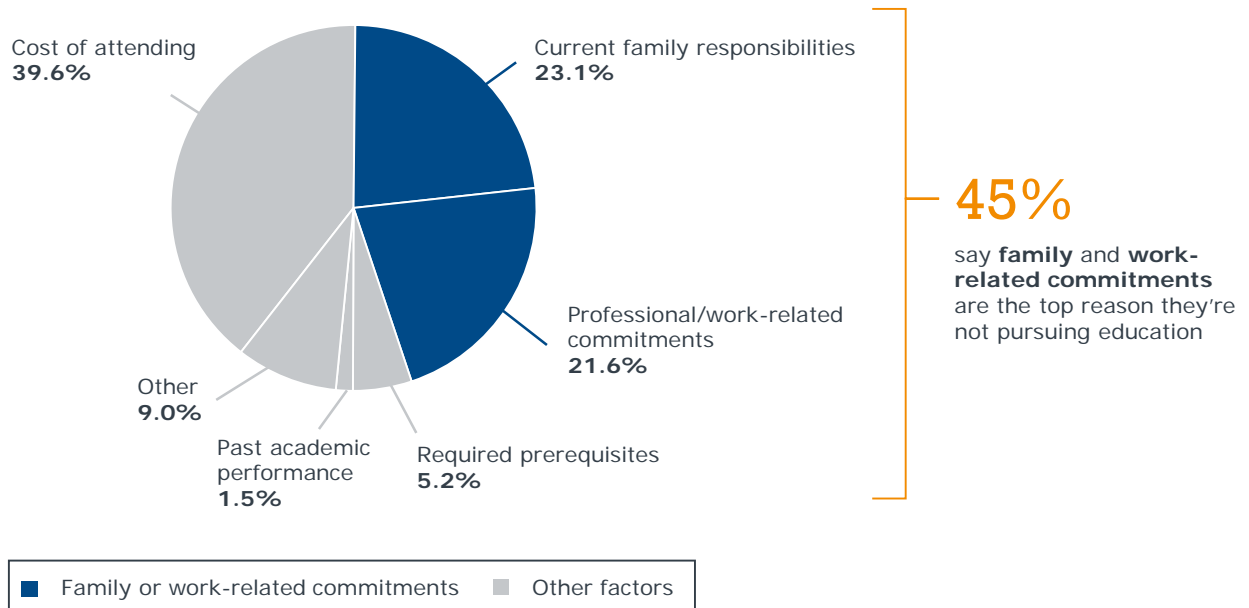


A Substantial Enrollment Obstacle

Family and Work Commitments Prevent Interested Prospects from Enrolling

What Prevents Interested Prospects from Pursuing Their Education Further?

Participants Who Indicated an Interest in Enrolling, but Not Within the Next Two Years



Students Value Flexible and Online Options



Flexible and Online Options That Ranked as Somewhat to Very Important in Enrollment Decisions

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

1 in 2

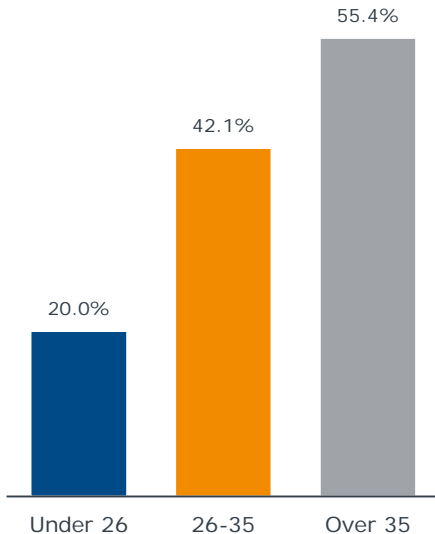
prospects considered online options when researching programs

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

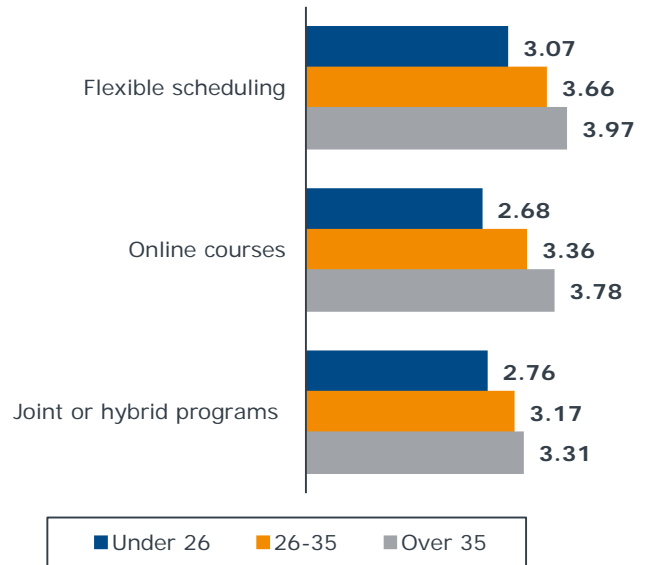
Especially Appealing to Older Adult Learners

Importance of Flexible Options Increases with Age of Student

Percentage of Prospects Who Considered Online Options by Age



Mean Importance of Flexible/Online Options by Age



Implications and Campus Perspective

**NORTHERN
ARIZONA
UNIVERSITY** 



1

A Pivotal Moment in Graduate Enrollment

2

Understanding the Shifting Adult Learner Mindset

3

Designing Graduate Programs for Growth

4

Break

5

Interactive Diagnostic Activity

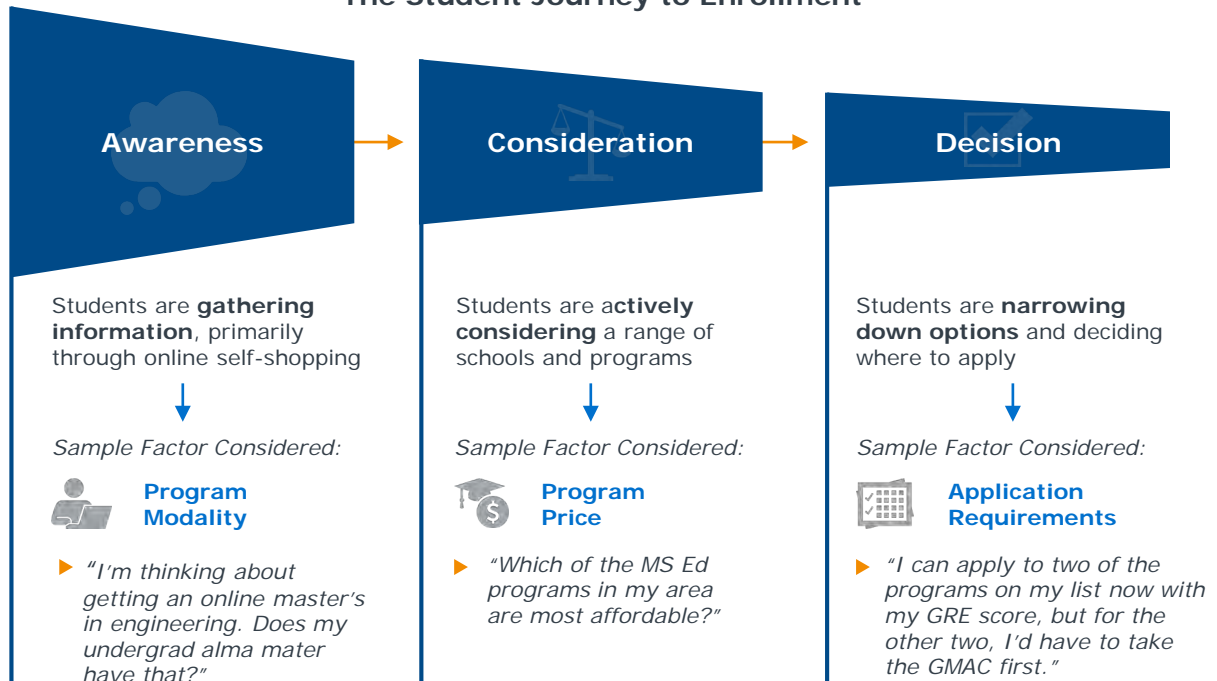
6

Conclusion and Q&A

Adults Learners Are Savvy Decision-Makers

Program Structure and Design Matter at Every Stage of the Student Journey







The Student Journey to Enrollment



A Compiled List of Factors to Assess

Creating Academic Programs That Are Competitive and Marketable

Top Factors to Consider When Evaluating Your Program

<i>Category</i>	<i>Considerations</i>
 Degree Name	Does degree name resonate in the market place? Do concentrations/specializations increase attractiveness?
 Market	Admissions requirements should consider career changers as well as career enhancers.
 Program Structure	<ul style="list-style-type: none"> • Credits • Courses • Time to Complete • Starts • Terms • Prerequisite(s) • Delivery
 Tuition	Evaluate list price against that of competitors
 Selectivity	Evaluate average test scores against those of competitors
 Residency	Evaluate residency against that of competitors, consider students studying at a distance

Finding the Data to Assess Your Programs

Sample Analyses for a Public University in the Midwest

IPEDS Degree Conferrals

Degree Conferrals *Master's in Nuclear Engineering*

	Avg % Change 2013-2017
National	-6.6%
Regional	-5.4%
Statewide	-6.9%

Assessment



Red

Bureau of Labor Statistics Occupational Outlook

Projected Occupational Growth *Master's in Biomedical Engineering*

		% Change in Job Openings 2016-2026
National	Engineering Managers	5.5%
	Biomedical Engineers	7.2%
Statewide	Engineering Managers	6.0%
	Biomedical Engineers	8.5%

Assessment



Yellow

IPEDS Online Program Growth

Online Programs Offered *Master's in Mechanical Engineering*

	Avg % Change 2013-2017
National	13.0%
Regional	5.1%
Statewide	12.5%

Assessment

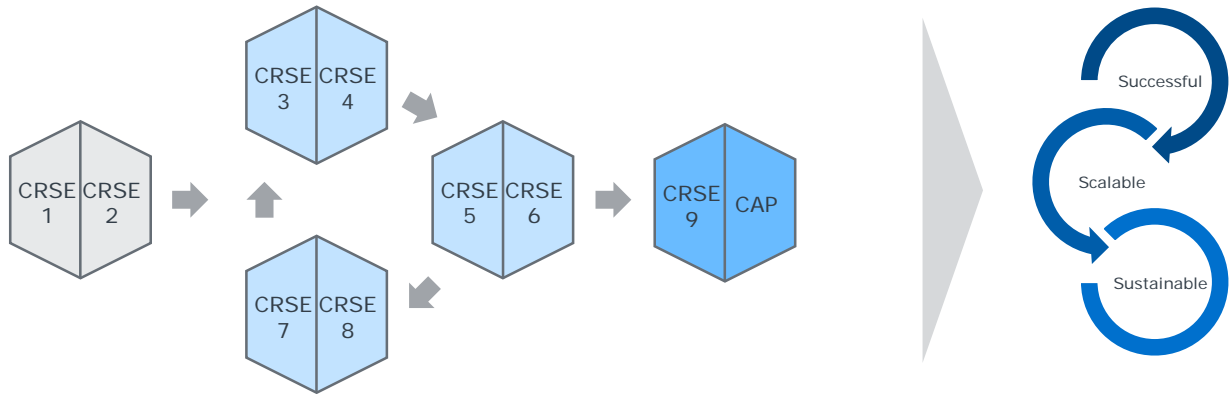


Green

Successful Curriculum Models Must Be Scalable

Part-Time Scheduling Accommodates Adult Learners and Financial Aid

Sample Curriculum Model



Considerations

- Does the curriculum model align to program outcomes and sequencing?
- Will the model allow for multiple entry points?
- How will faculty and instructional resources align to the model?
- Can the model be accommodated by the institution's academic calendar?

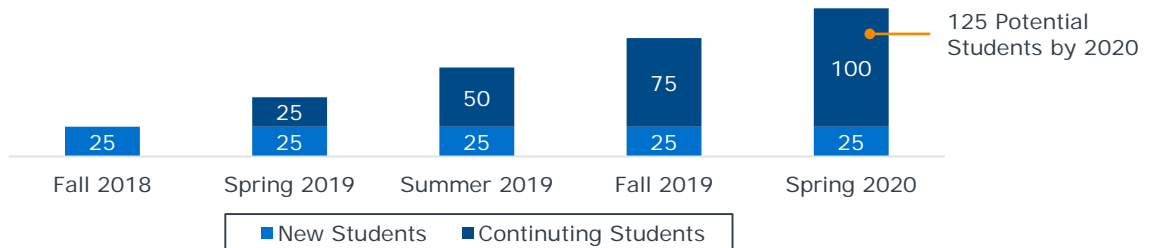
Strategic Schedule of Courses Requires Planning

Align Faculty Resources with Student Demand to Optimize Investment

Sample Schedule of Courses

Academic Terms	FA 2018 A	FA 2018 B	SP 2019 A	SP 2019 B	SU 2019 A	SU 2019 B	FA 2019 A	FA 2019 B	SP 2020 A	SP 2020 B
Admission Group 1	CRSE 1	CRSE 2	CRSE 3	CRSE 4	CRSE 5	CRSE 6	CRSE 7	CRSE 8	CRSE 9	CAP
Admission Group 2			CRSE 1	CRSE 2	CRSE 5	CRSE 6	CRSE 7	CRSE 8	CRSE 3	CRSE 4
Course Enrollments	25 N	25 N	25 N	25 N	25 N	25 N	25 N	25 N	25 N	25 N
			25 C	25 C	50 C	50 C	75 C	75 C	100 C	100 C
Sections (25 enrollments each)	1	1	1	1	1	1	1	1	1	1
			1	1	2	2	3	3	4	4
Faculty Headcount	1	1	1	1	1	1	1	1	1	1
			1	1	2	2	3	3	4	4

Hypothetical Enrollments



Snapshot of NAU's Institutional Journey

From Faculty-Centered
to **Student-Centered**



- 1 A Pivotal Moment in Graduate Enrollment
 - 2 Understanding the Shifting Adult Learner Mindset
 - 3 Designing Graduate Programs for Growth
 - 4 Break**
 - 5 Interactive Diagnostic Activity
 - 6 Conclusion and Q&A
-

1

A Pivotal Moment in Graduate Enrollment

2

Understanding the Shifting Adult Learner Mindset

3

Designing Graduate Programs for Growth

4

Break


5

Interactive Diagnostic Activity

6

Conclusion and Q&A

Adult Learner Program Planning Diagnostic


EAB

Adult Learner Program Planning Diagnostic

Does Your Program Design Support Graduate and Online Enrollment Growth?

Adult Learner Recruitment

Planning Diagnostic

Good graduate enrollment in a competitive environment, excellent leaders must take only actions related to program design, admission requirements, student resource allocation, and more, all to help graduate program leaders assess their own program planning practices and identify methods in support of growth goals.

It is designed to evaluate the following questions:

How do your program offerings and operations align with adult learner enrollment requirements (e.g., flexible flexible delivery, course options, and a streamlined admissions process)?
 How do your program offerings and operations align with adult learner enrollment preferences (e.g., program design, course options, and a streamlined admissions process)?
 How do your program offerings and operations align with adult learner enrollment needs (e.g., program design, course options, and a streamlined admissions process)?

	This assessment describes the	Adult Learner Enrollment
		How to improve the adult learner enrollment
Curriculum Design	Online	Open
	1 2 3 4 5	
Programs are designed to meet the needs of adult learners.		
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Delivery		
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Admission		
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Support		
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	
Programs are designed to meet the needs of adult learners.	1 2 3 4 5	

- 1 A Pivotal Moment in Graduate Enrollment
 - 2 Understanding the Shifting Adult Learner Mindset
 - 3 Designing Graduate Programs for Growth
 - 4 Break
 - 5 Interactive Diagnostic Activity
 - 6 **Conclusion and Q&A**
-

Key Takeaways

- 1 Be **student-centric** in program structure and design
- 2 Ensure decisions are informed by your **market and competitors**
- 3 **Align resources with demand** to optimize for growth



Washington DC | Richmond | Birmingham | Minneapolis

202-747-1000 | eab.com