

Navigating an Uncertain Enrollment Landscape

Research Insights for Graduate Recruitment During the Pandemic

Presented by Will Lamb, Ph.D., Dean of Graduate and Adult Learner Recruitment



**We help schools
support students
from enrollment to
graduation and beyond**

➤ **ROOTED IN RESEARCH**

7,500⁺ Peer-tested
best practices

500⁺ Enrollment innovations
tested annually

➤ **ADVANTAGE OF SCALE**

1,500⁺ Institutions
served

3.7 M⁺ Students supported
by our SSMS

➤ **WE DELIVER RESULTS**

95% Of our partners continue
with us year after year,
reflecting the goals we
achieve together

➤ Find and enroll your
right-fit students

➤ Support and graduate
more students



➤ Prepare your institution
for the future

1 The Shifting Graduate Enrollment Landscape

2 The Impact of COVID-19 on the Adult Learner Mindset

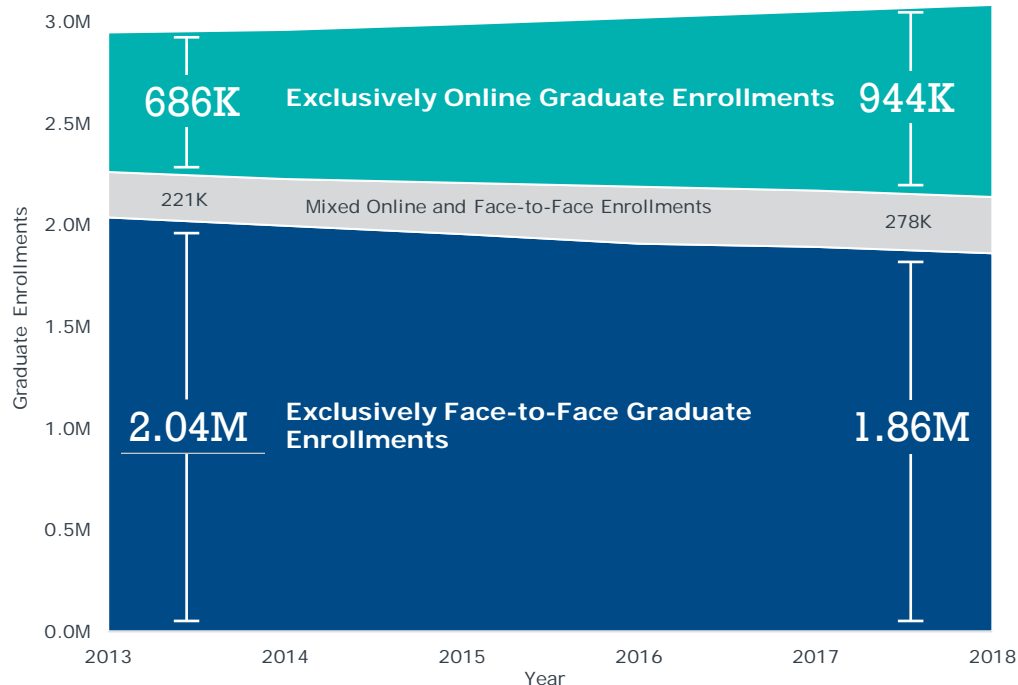
3 Conclusion and Q&A

Graduate Market Growth Was Already All Online

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Online, Face-to-Face, and Mixed Graduate¹ Enrollments, 2013-2018

Exclusively, Some, and No Online² Courses



+258K

Total Increase in Online Graduate Students 2013-2018

+6.6%

Avg. Annual Growth

-179K

Total Decrease in Face-to-Face Graduate Students 2013-2018

-1.8%

Avg. Annual Decline

1) Graduate students include both master's and doctoral students.

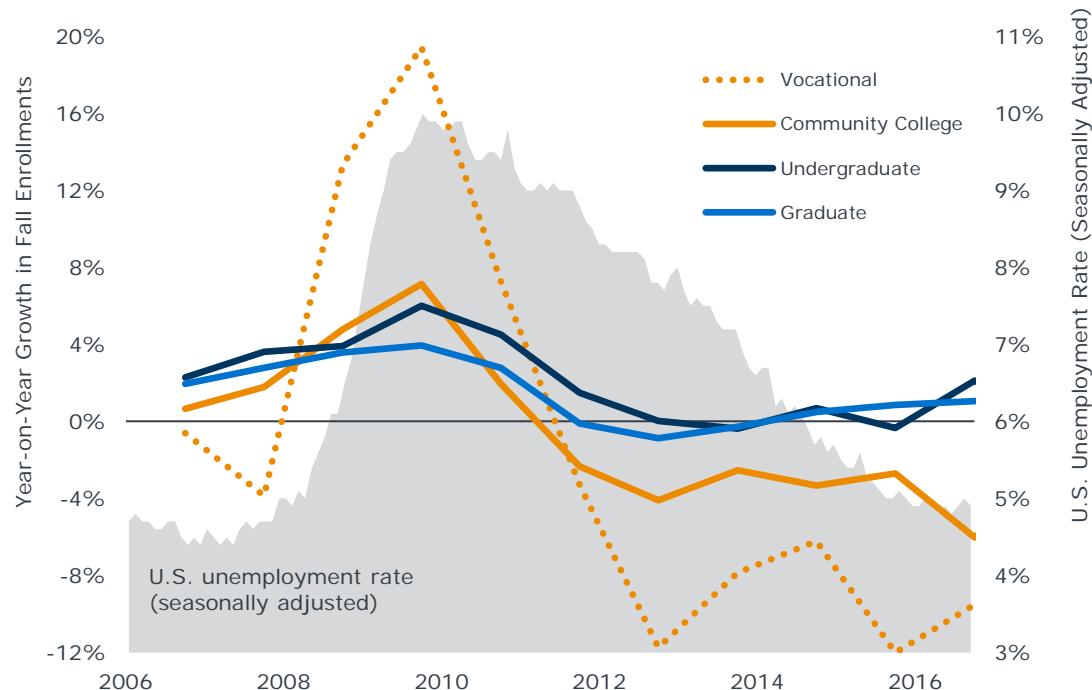
2) Recorded as 'Distance Education' in IPEDS data

Source: EAB analysis of distance enrollment data from IPEDS Fall Enrollment Surveys 2012-18, EAB interviews and analysis.

How Countercyclical Is Higher Ed Enrollment?

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Sub-Baccalaureate Market Grew the Most During the Last Recession



- 1) Includes all public 2-year institutions.
- 2) Includes all less-than-2-year institutions and all private nonprofit and for-profit 2-year institutions.

But Countercyclical Enrollments Not a Given This Time Around



Fewer students filing FAFSA



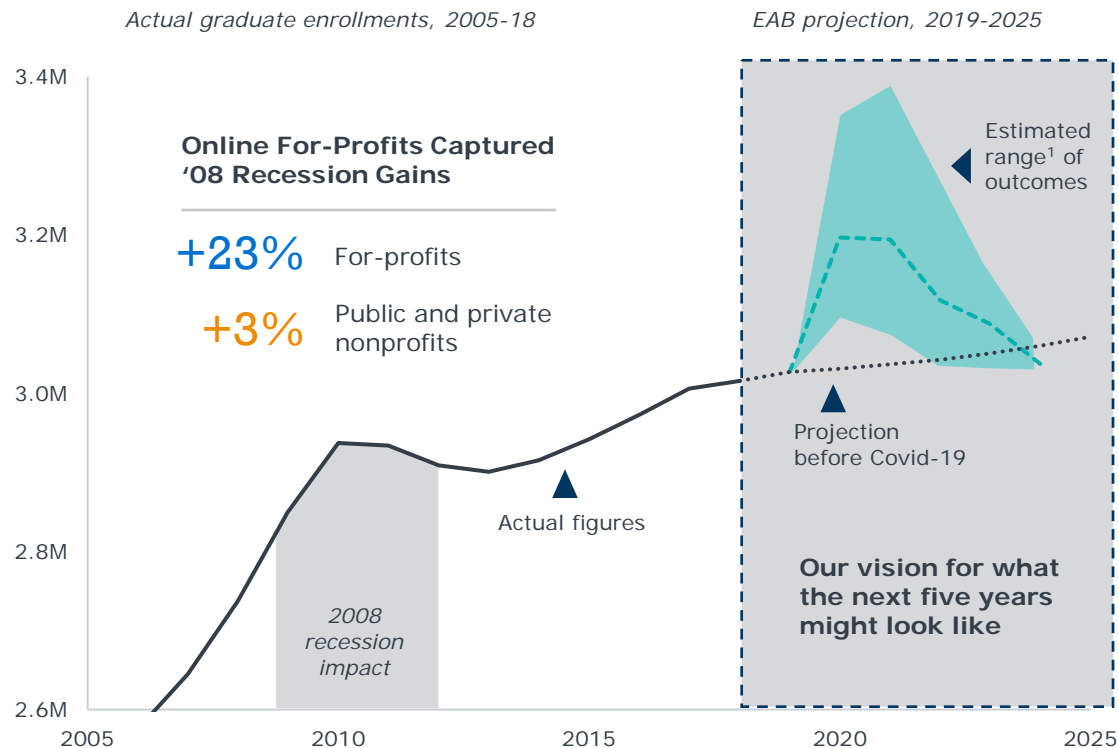
Unlikely to repeat '09 Pell expansion



More High School Dropouts Likely

Anticipating a Countercyclical Boost for Graduate Enrollment

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Assumptions Used to Produce EAB Projection

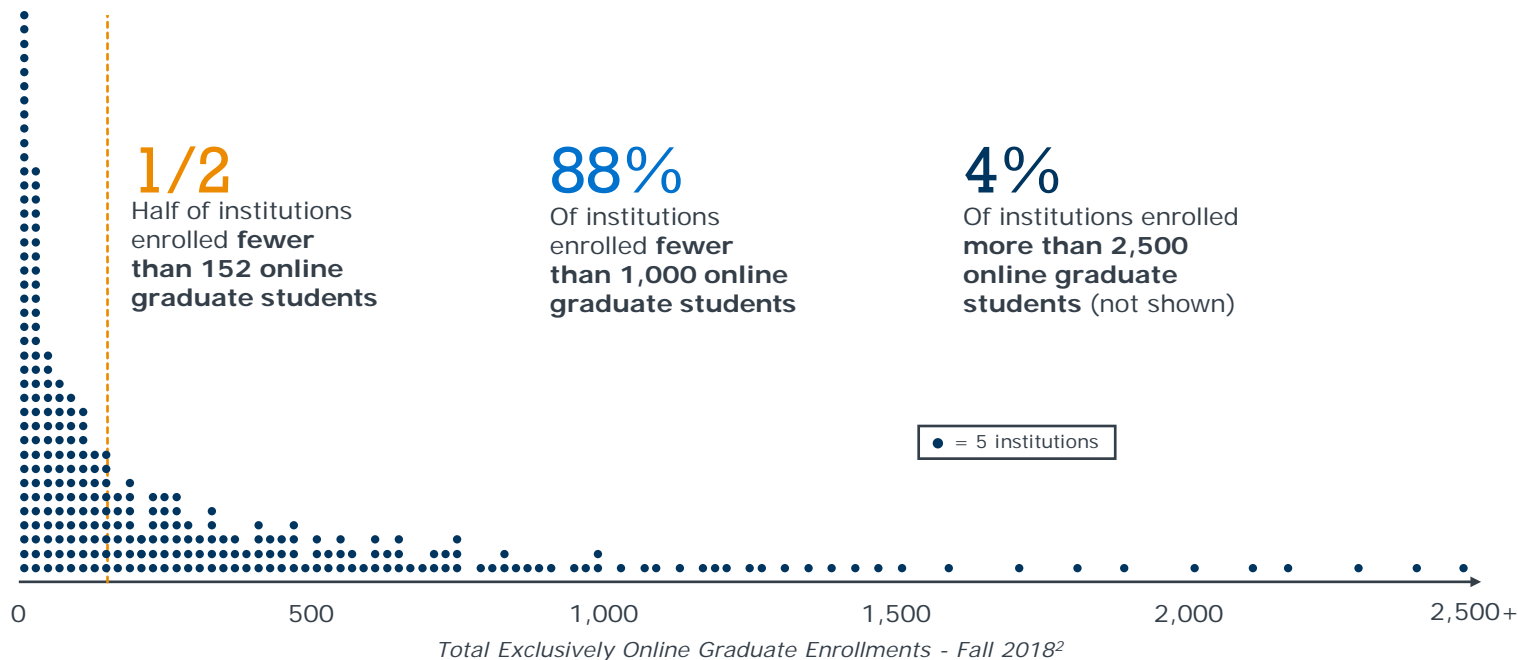
- Unemployment (Q2 2020): 14-18%
- Duration of high (8%+) unemployment: 1-3 yrs.
- Student expectation of economic recovery: 0-25% reduction in countercyclical effect
- Share of countercyclical enrollments to alternative providers: 0-25%
- Enrollment decline due to cost aversion: 0-3% above '08 effect

1) Range of possibilities is not a confidence interval.

Even More Will Play—Few Will Get Big

Few Institutions Poised to Become Online Giants (Or Even Online Mediums)

Institutions by Total Exclusively Online¹ Graduate Enrollments, Fall 2018



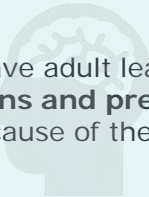
1) Recorded by IPEDS as exclusively distance enrollments.

2) Bin widths equal 20 enrollments.

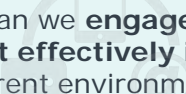
An Imperative to Understand the Shifting Adult Learner Mindset

Understanding How Prospects Think and Behave Is Critical to Growing Enrollment During COVID-19

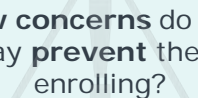
Key Questions for Growing Enrollment in Our “New Normal”



How have adult learners' **motivations and preferences** changed because of the pandemic?



How can we **engage them most effectively** in the current environment?



What **new concerns** do they have that may **prevent** them from enrolling?

1

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Conclusion and Q&A

Introducing EAB's 2020 Graduate and Adult Student Survey Research

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How We Defined "Adult Learners"

Current and prospective students of graduate, bachelor's degree completion, online, and certificate programs¹

Research Methodology

COVID-19 Pulse Survey



Late May 2020
1036 Students and Prospects



Adult Learner Mindset Survey



Winter 2020
1077 Students and Prospects¹

¹) Students considering or currently enrolled in graduate programs comprised 67% of all survey respondents.

Key Findings

Four Predictions to Inform Graduate Enrollment Strategy During COVID-19

- 1 The pandemic will increase the **volatility** of your prospect pool.
- 2 **Online research** will become even more central to the adult learner journey to enrollment.
- 3 **Generational differences** will persist in attitudes toward online education.
- 4 Adult learners will approach the application process even **more pragmatically** than before.



Prediction #1

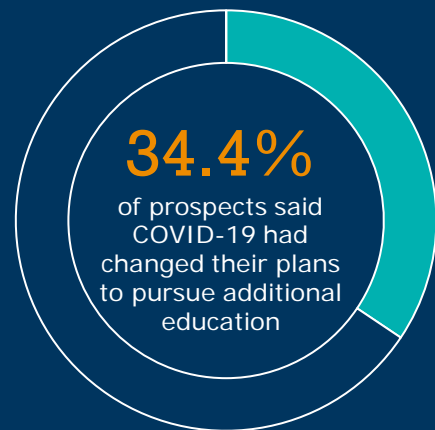
**The pandemic will increase the
volatility of your prospect pool.**

Prospects' Plans in Flux Amid Economic Uncertainty

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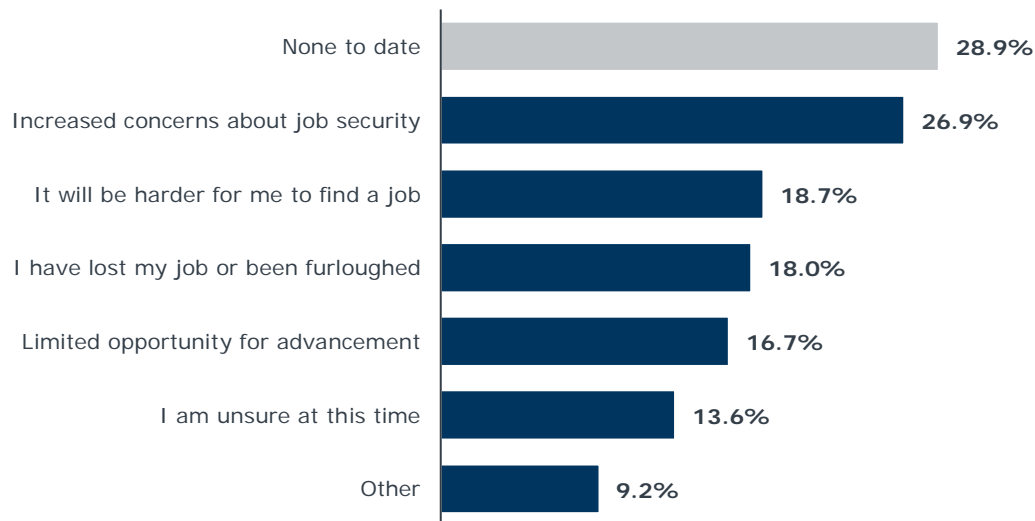
COVID-19 Has Impacted Many Prospects' Enrollment Plans

As of May 2020



"What impact has the COVID-19 pandemic had on your current job and/or future employment prospects?"

Prospective Students, as of May 2020¹



1) Participants could select multiple responses

Differentiating the “Hesitators” from the “Accelerators”

Hesitators



Accelerators

Mindset and Behaviors

- Will choose to delay enrollment plans
- Some are facing sudden lack of resources to support education due to job loss, furlough, or pay cut
- Others are now motivated to continue working due to new concerns about future financial security

“Will I have enough money to attend school?
Should I reconsider in order to pay for more important bills?...For those who can't afford school, it becomes a **want over a need**.
Education is important, but can I afford it?”

- Survey Participant

Mindset and Behaviors

- Will choose to expedite enrollment plans
- Often seeking to enroll sooner to gain new skills because of newly difficult job market
- May be interested in non-degree or certificate options

“The job market has shrunk, and **education seems like a smart investment** in my future.”

- Survey Participant

Managing Turbulence in Your Prospect Pool

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Strategy Recommendations



Discover and Respond to Individual Prospect Concerns

Use tactics such as micro-surveys to understand shifting prospect intent as they progress through the student journey



Ensure That Your Marketing Articulates Return on Education

In addition to providing data on career outcomes, showcase career support services that can help graduates in an uncertain economy



Identify Portfolio Vulnerabilities and Opportunities

Analyze industry trends to determine how countercyclical effects might impact program and portfolio enrollment



Prediction #2

Online research will become even more central to the adult learner journey to enrollment.

The Key Role of Online Research Before COVID-19



“Indicate how important the following contacts and communications have been in your search for information about furthering your education.”

Adult Learners Aged 26 and Older, Winter 2020 Survey

Top 5 Most Important Contacts and Communications	Mean
School's responsiveness to my inquiries	4.15
Resources available on the school's website	4.08
Email communications from the school	3.80
Online resources (e.g., search engines, banners, and directories)	3.71
Individual communication with faculty in my program of interest	3.68

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

Online Research a Pivotal Component of Prospects' Multichannel Journey

71%

of adult learners used the school's website when they began searching for more information

Search Is More Critical to Enrollment Strategy During COVID-19



Online Search a Key Resource for Prospects as Their Plans Shift



As the crisis and economic situation evolve, prospects will turn to search engines to inform their enrollment decisions.

Paid Search an Important Lead Generation Tool



Paid search can help supplement test-taker lists, which may be impacted by the crisis.

Ensuring Your Recruitment Strategy Supports Online Research



Recommendations



Ensure Your Website Is Search Engine Optimized

Audit program webpages to confirm they are optimized to appear in top search results, address common crisis-related questions, and include any recent updates to admissions policy.



Optimize Paid Search Efforts

Use paid search campaigns to reach prospects as they research programs. As paid search becomes more competitive, it will become critical to manage campaigns effectively to keep costs manageable.



Leverage a Virtual Tour

For prospects who are interested in the campus experience, virtual tours can help them “visit” campus if they’re unable or unwilling to visit in the short term



Prediction #3

**Generational differences will persist
in attitudes toward online education.**

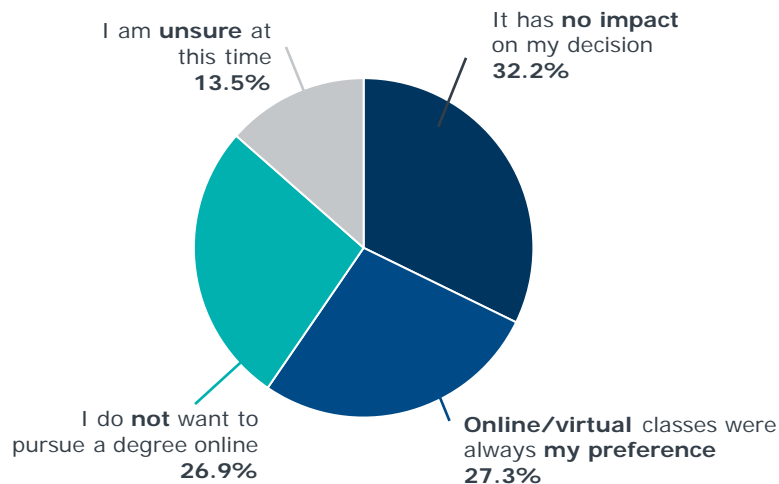
How Online Course Delivery Might Impact Enrollment Decisions

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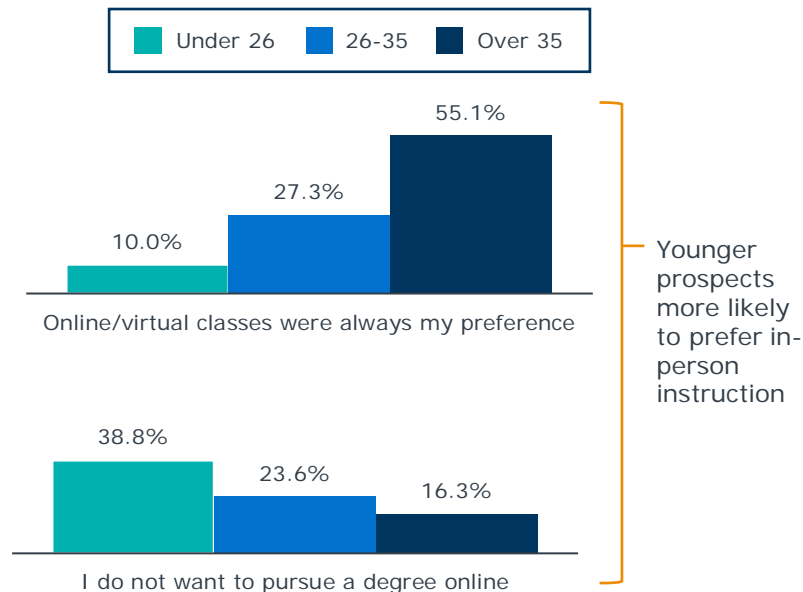
How Will Online-Only Contingency Plans Impact Prospects' Decision to Enroll?

"Which of the following statements best reflects your preference?"

All Responses



Responses by Age

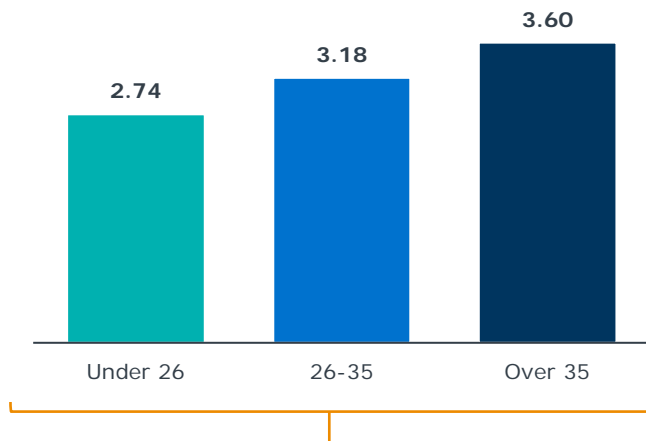


Perceptions of Quality of Online Options Vary by Age

Older Students Value Flexible, Online Options, While Younger Students Value Campus Environment

Older Students More Likely to View Online Options as Essential

Mean Scores by Age¹



Level of agreement with the statement
“**Online classes are essential** to my ability
to obtain a degree”

Younger Students More Likely to Question Return on Online Education During COVID-19

“Online learning deprives me of the same faculty engagement and opportunity I was looking for in a residential graduate program. **I am currently unable to make those personal connections, go to networking and professional development events, and intern in my field.** That is an integral part of my graduate education and **without it, the sky-high cost is not worth it.**”

- Survey Participant

1) Mean scores are based on a 5-point scale, where 5 = strongly agree and 1 = strongly disagree.

Navigating Differing Perceptions of Online Education

Recommendations



Tailor Your Marketing According to Students' Concerns and Preferences

Messaging about flexibility is more likely to appeal to older prospects, while discussions of return on education can help address younger prospects' concerns about quality.



Vet Programs Carefully Before Taking Them Fully Online

Ensure that program learning objectives align to market trends and account for competitive intelligence, historical enrollment, and revenue performance.



Prediction #4

Adult learners will approach the application process even more pragmatically than before.

Adult Learners Remain Highly Pragmatic

A Tactical Approach to the Application Process

Applying with a Focused Plan

72%

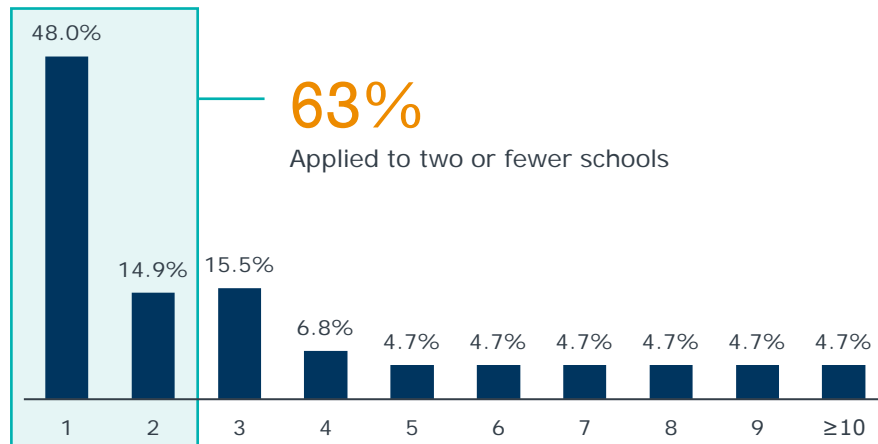
Of respondents knew where they would be applying before they took a graduate admissions test

52%

Enrolled within 6 months of taking a graduate admissions test

"To how many schools/programs did you apply?"

Students Aged 26 and Older, Winter 2020 Survey

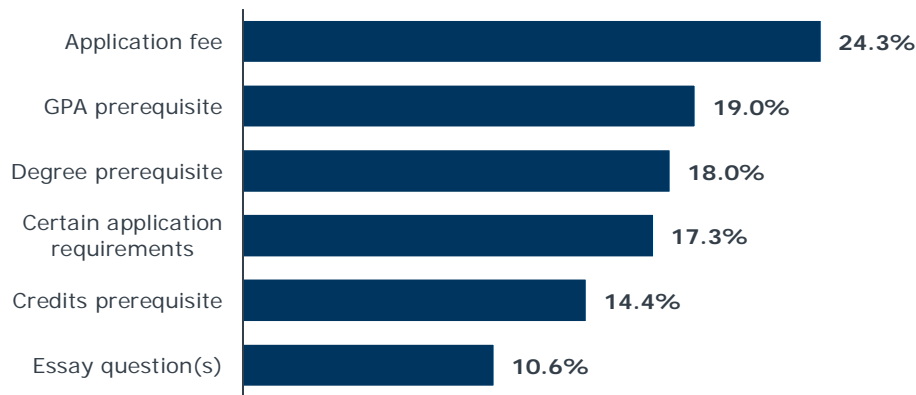


Minimizing Time and Resources Spent While Applying



“Which application and admissions requirements (if any) influenced your decision not to apply to a specific school or program?”

Students Aged 26 and Older, Winter 2020 Survey



Limiting Time Spent on the Application Process

1 in 2

Adult learners completed their application in **2 hours or less**

47%

Of adult learners who plan to enroll or who are currently enrolled said they **had not taken a graduate admissions test**

Eliminating Unnecessary Obstacles to Enrollment

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Assess Application Requirements



Ensure Your Application Is User-Friendly



Audit Program Requirements



Strategies for Streamlining:

- Enable test-optional policy or self-reported scores
- Accept unofficial transcripts
- Waive application fees or requirements for multiple letters of recommendation

Application Best Practices:

- Include straightforward instructions and navigation
- Make sure your application is easy to complete on mobile
- Pre-populate student information on landing pages

Audit Components:

- Critically review all program prerequisites
- Assess requirements against those of competitors

“Initially I wasn't going to pursue a master's degree after graduation. However, many programs are waiving [parts of] the application and the GRE test. Therefore, I am taking the initiative to apply to programs.”

- May 2020 COVID-19 Survey Participant

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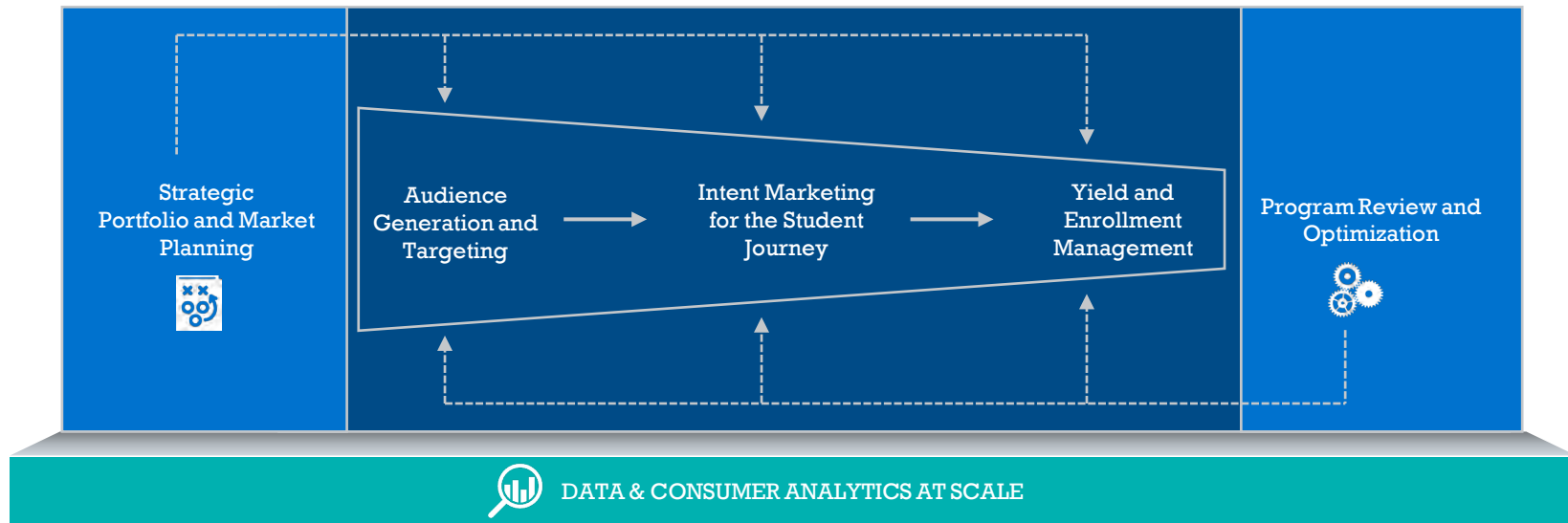
Conclusion and Q&A

Key Takeaways

- 1 It will be critical to understand and respond to shifting prospect intent.
- 2 Website optimization and paid search efforts are more important than ever.
- 3 The imperative to articulate return on education will become greater.
- 4 When possible, eliminate obstacles in the application process.

The Smart Growth Solution for the Adult Learner Market

Our **strategic enrollment solution** combines intent marketing and strategic services to fuel adult learner growth.



1.5B+

Student interactions analyzed annually

100+

Data and analytics experts on staff

500+

Field marketing tests performed annually

7000+

Custom market demand briefs completed since 2012



To learn how EAB can help you meet your enrollment goals, email EABALRCommunications@eab.com



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