



UNDERSTANDING THE

Impact of COVID-19 on the **Adult Learner Mindset**

Four Predictions to Inform Graduate
and Online Enrollment Strategy

Adult Learner Recruitment

Speak to an Expert



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EAB's team of graduate, online, and degree completion experts is available to speak with you about this research. If you would like to discuss how the findings in this white paper could support and shape your institution's growth strategy, please email [**jocelynpowers@eab.com**](mailto:jocelynpowers@eab.com).

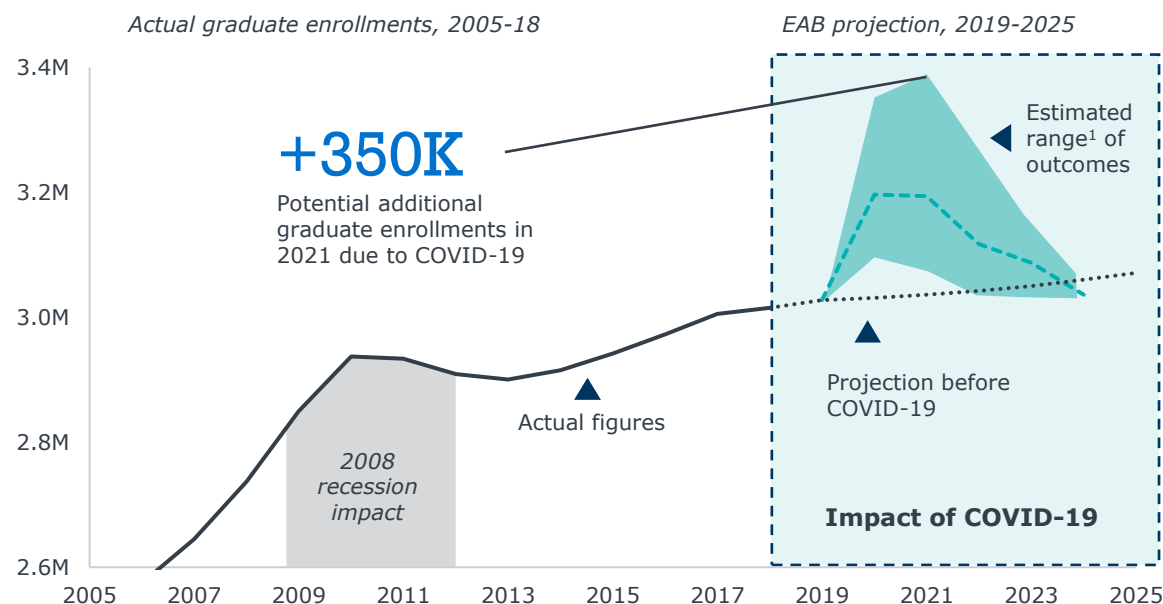


Executive Summary

A Pivotal Moment for Adult Learner Enrollment

The COVID-19 pandemic has accelerated the trend of declining undergraduate enrollment, with first-time enrollments now estimated to drop by as much as 30% from 2019 to 2025. At the same time, the crisis has presented institutions with new opportunities to offset declines in undergraduate revenue through adult learner growth, with estimates showing up to 350,000 additional graduate enrollments in 2021. However, with increasing competition, capturing countercyclical growth will be challenging. To succeed, institutions will need to carefully tailor their program offerings and recruitment strategies to prospects' preferences and behaviors.

Figure 1: Expecting a Countercyclical Boost in Graduate Enrollments



Understanding the Adult Learner Mindset During COVID-19

As COVID-19 has transformed daily life, it has profoundly altered adult learners' preenrollment behaviors and mindsets. To help our partners better understand these shifting dynamics and their implications for enrollment strategy, EAB conducted a survey of more than a thousand current and prospective students of graduate, online, and undergraduate degree completion programs in late May 2020. This report pairs findings from that research with data from a survey of adult learners conducted just before the pandemic in winter 2020. As we will elaborate in the following pages, our findings indicate that four key trends will shape adult learner behavior throughout the pandemic.

1) Range of possibilities is not a confidence interval.

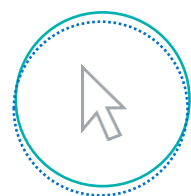
Source: BLS US Unemployment Statistics, IPEDS Fall Enrollments 2005-2018, EAB interviews and analysis.

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The Pandemic Will Increase the Volatility of Your Prospect Pool

PREDICTION

1

Prospects' Plans in Flux amid Economic Uncertainty

Many Prospects Are Changing Their Enrollment Plans as COVID-19 Impacts Their Career, Finances, and Home Lives

Due to the pandemic's extensive impact on the economy and prospects' day-to-day lives, enrollment leaders can expect a much less stable prospect pool than in previous years. More than one in three adult learner prospects reported that COVID-19 had already changed their enrollment plans in our May 2020 survey.

Career and finances have always played a central role in adult learners' enrollment considerations, and that trend holds true during the economic turbulence of the pandemic. Our survey indicated just how wide-reaching COVID-19's economic impacts have been for prospective adult learners, with over 70% of participants reporting that the pandemic had negatively impacted their current or future employment outlook. While the most frequently reported impacts were increased concerns about current job security or future job prospects, about one in five participants reported that they had been fired or furloughed. In free responses, participants elaborated on the many other ways their employment status or plans had been affected, including changes due to spouses' employment and concerns about the safety of their job during the pandemic.

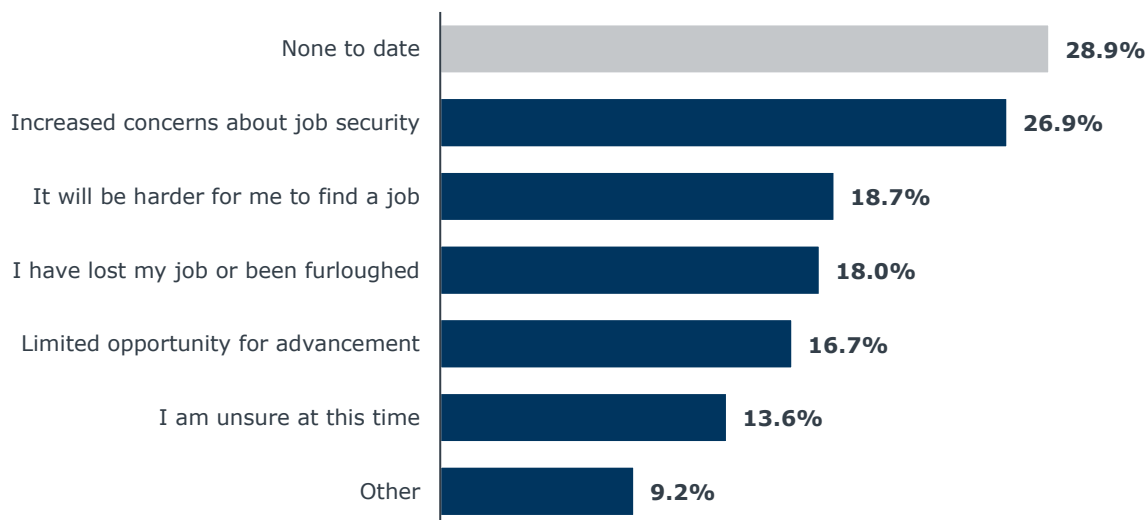
COVID-19 Influencing Enrollment Decisions

34.4%

of prospective adult learners indicated that COVID-19 had changed their plans to pursue additional education

Figure 2: "What impact has the COVID-19 pandemic had on your current job and/or future employment prospects?"

Prospective Students¹



Adult Learners Describe Wide-Reaching and Diverse Effects on Employment

Free Responses on the Impact of COVID-19

"My partner is unlikely to find a job in academia next year, so I need a better paying job."

"I quit [my] job due to lack of safety and protocol."

"My hours were significantly reduced."

1) Participants could select multiple responses.

Differentiating the ‘Hesitators’ from the ‘Accelerators’

Diverging Responses to New Financial Pressures

While our research revealed that financial concerns were very influential in prospects’ decisions to change their plans, it also showed that the same factors that motivate some prospects to enroll will deter others. Faced with negative financial or employment consequences from the pandemic, some prospects will choose to expedite plans to enroll, while others will opt to defer them. Differentiating the mindsets and behaviors of the two groups can help enrollment leaders more accurately plan enrollment strategy and address the needs and concerns of each.

Understanding the “Hesitators”: Prospects Who Choose to Delay Enrollment Timelines

A large segment of prospective adult learners who had previously planned to return to school will instead choose to defer their plans. Many will make this choice due to a new lack of resources: because of job loss, furlough, or a pay cut, they will no longer have the same level of resources to finance their education. For others, concerns about future financial security will motivate them to continue working. As one participant explained, “[I’ve] been held back from applying, focusing on making money.” For prospects who choose to delay enrollment plans, previous concerns about the financial burden of enrollment or doubts about return on education have been heightened by the pandemic. As discussed in the third section of this report, the possibility of remote-only instruction has introduced further concerns about return on education for many prospects.

Questioning Return on Education

“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

Understanding the “Accelerator” Mindset

In contrast, for many other prospects, new financial concerns will act as a catalyst for their return to school. Our research showed that many students in this group are seeking to enroll sooner than they had previously due to emerging apprehension about job security or employment prospects. These students are motivated by the desire to gain new skills, make themselves more attractive to employers, and wait out a tough job market. As one participant put it: “I was not going to apply this soon, but it is better to start now because we don’t know what the job market will look like. It’s better to have more skills and degrees to increase [my] chances of getting a job.” While many of these prospects seek to enroll in traditional degree programs, for others, non-degree credentials are more appealing.

Feeling Reaffirmed About the Value of Additional Education

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

- Survey Participant

Managing Turbulence in Your Prospect Pool

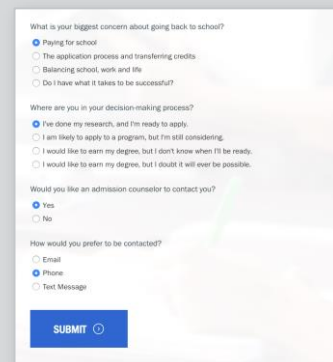
Strategy Recommendations

With a more dynamic prospect pool and an evolving economic and public health landscape, it will be critical for enrollment leaders to engage prospects through relevant messaging and appealing program offerings. We recommend that you implement the following strategies.

1

Discover Individual Prospect Concerns and Market to Each Prospect Accordingly

Enrollment leaders should implement tactics for discovering individual prospect timelines and concerns throughout the entire student journey. Understanding prospects' intents will be critical both to accurately assess enrollment funnel performance and to engage prospects based on their concerns and motivations. Micro-surveys are one method that EAB uses to help our [Adult Learner Recruitment](#) partners determine prospect concerns and intent at the consideration stage. Admitted-student surveys can also serve the same purpose at the deposit stage. These tactics can help your institution determine the appropriate audience, channel, messaging, and call to action for communications.

A sample EAB Prospect Micro-Survey form. The form contains several questions with radio button options. The first question is 'What is your biggest concern about going back to school?' with options: 'Paying for school', 'The application process and transferring credits', 'Balancing school, work and life', and 'Do I have what it takes to be successful?'. The second question is 'Where are you in your decision-making process?' with options: 'I've done my research, and I'm ready to apply.', 'I am ready to apply to a program, but I'm still considering.', 'I would like to earn my degree, but I don't know when I'll be ready.', and 'I would like to earn my degree, but I doubt it will ever be possible.'. The third question is 'Would you like an admission counselor to contact you?' with options: 'Yes' and 'No'. The fourth question is 'How would you prefer to be contacted?' with options: 'Email', 'Phone', and 'Text Message'. At the bottom is a blue 'SUBMIT' button with a circular arrow icon.

Sample EAB Prospect Micro-Survey

2

Ensure That Your Marketing Articulates Return on Education

As prospects reconsider their enrollment plans, it will be critical to demonstrate the value that your programs can offer during this period of economic uncertainty. In addition to providing data on program graduates' career outcomes, institutions should also consider showcasing their career support services as a means of illustrating return on education. Articulating the specific ways that your institution can support career goals can be a valuable differentiating factor as prospects compare institutions.

3

Analyze Industry Trends to Identify Portfolio Vulnerabilities and Opportunities

Changes in regional and national labor markets are a key cause of the current turbulence in prospect pools. As they continue to shift, it will be essential to monitor and assess program offerings to ensure alignment with employer demand. Institutions should periodically audit program portfolios to identify vulnerabilities and reprioritize opportunities.



Online Research Will Become More Central to the Student Journey to Enrollment

PREDICTION

2

The Growing Importance of Online Research

The Key Role of Online Research Before COVID-19

Online research played a critical role in the adult learner journey to enrollment before the pandemic hit. Our winter 2020 survey indicated that students rely on search engines and websites as they consider their enrollment options, with 71% of current students saying that they consulted the school's website when searching for more information. They also named online resources as some of the most important contacts and communications when searching for information.

One Step in a Multichannel Journey

While digital research is one of the key methods that prospects use to educate themselves about their options, it's important to note that online research complements other critical sources. In our winter 2020 survey, students also named resources such as email communications, personal communication with faculty, and word of mouth as top sources of information.

Figure 3: "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

Top 5 Contacts and Communications	Mean
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
Recommendations from professionals working in intended area of study	3.38

Search engines and websites were classified as "very important"

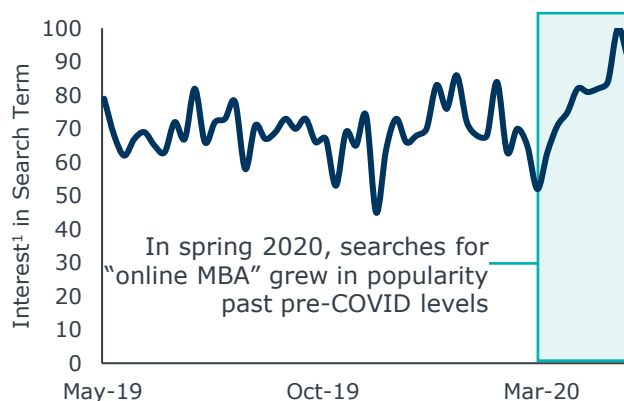
Mean scores are based on a 5-point scale, where 5 = extremely important and 1 = not at all important.

Online Search to Become More Critical to Engage Adult Learners During COVID-19

As the crisis influences prospects' daily lives in the form of financial worries, health concerns, questions about the value of remote instruction, and numerous other ways, they'll turn to search engines to help them make informed decisions. We've already seen evidence of this behavior, when interest in search terms related to online learning increased significantly as the country transitioned from in-person to remote instruction during the spring. For example, searches for "online MBA" quickly increased, surpassing pre-COVID levels during this time period.

As prospects continue to use online research to help them navigate unprecedented times, it will be critical for institutions to ensure they offer up-to-date, engaging information for online researchers on their school website and in search results.

Figure 4: Search Popularity Grew for "Online MBA" During COVID-19, May 2019-May 2020



1) Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. A score of 0 means there was not enough data for this term.

Engaging Online Researchers During COVID-19

Paid Search Is an Increasingly Important Lead-Generation Tool

In addition to connecting prospects to highly relevant and engaging information about your institution, paid search can also be a valuable lead-generation tool. With disruption in test-taking during COVID-19, it will be important for institutions to supplement test-taker lists with additional lead sources, including paid search.

Strategy Recommendations

To ensure your enrollment strategy leverages online research behavior, consider implementing the following strategies:

1 Ensure Your Website Is Search Engine-Optimized

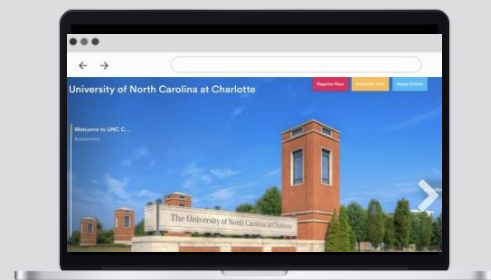
As prospects' concerns and your institution's policies evolve, it will be critical to ensure that your website enables easy access to relevant and engaging information. Make sure that website headlines and content are accurate and clearly address any key changes to your institution's admissions policies or other responses to the crisis. In addition, periodically review the most popular organic pages and ensure that they're easily accessed through your home page or other central pages. Furthermore, review technical components of your site that impact user experience, including page speed and broken links, to facilitate easy navigation.

2 Optimize Paid Search Efforts

As institutions across the country ramp up paid search, it will be imperative to manage campaigns effectively to control cost amid heightened competition. To maximize return on investment from paid search campaigns, institutions should be sure to adjust ad creative so that it reflects their recruitment strategy during COVID-19, including any updates to testing or admissions requirements. In addition, as the effects of the pandemic vary by state and region, it will be critical to monitor geographic trends and respond quickly if keywords are performing poorly in certain regions.

3 Leverage a Virtual Tour

Even if in-person instruction has been temporarily scaled back or paused at your campus, it will be critical to nurture leads who might be interested in attending courses on campus once they are able. Virtual tours can help build affinity with these prospects by allowing them to "visit" if they're unable or unwilling to visit in the short term.



EAB's YouVisit Virtual Tour

Source: EAB research and analysis.



Generational Differences Will Persist in Attitudes Toward Online Education

PREDICTION

3

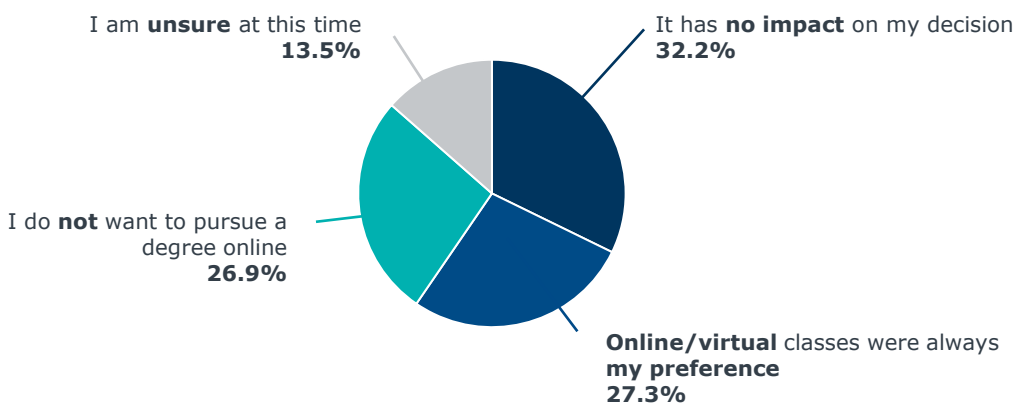
How Online Course Delivery Impacts Students' Plans

Most Adult Learner Prospects Are Open to Online Courses

As institutions consider whether to conduct classes on campus or remotely in 2020 and beyond, they must weigh the impact that prospects' attitudes toward online-only instruction might have on their decision to enroll. Our May 2020 survey revealed mixed reactions from adult learners. While 60% of prospects indicated they either did not mind or preferred online classes, 26.9% responded that they did not want to pursue a degree online. This data indicates that a significant minority of prospects will choose to not enroll while classes are held online, contributing to turbulence in the prospect pool.

Figure 5: How Will Online-Only Contingency Plans Impact Decisions to Enroll?

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

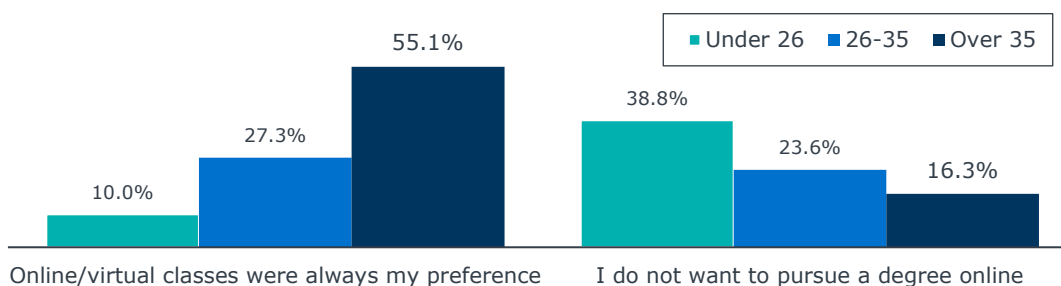


Older Adult Learners Are More Open to Online Course Delivery

Our research indicated that older prospects were, in general, more comfortable with the possibility of pursuing their degree online. Prospects over the age of 35 were more than five times as likely as prospects under age 26 to say that online or virtual classes had always been their preference, and they were about half as likely to say that they did not want to pursue a degree online.

Figure 6: Younger Prospects Are More Likely to Prefer In-Person Instruction

"Which of the following statements best reflects your preference?", Responses by Age

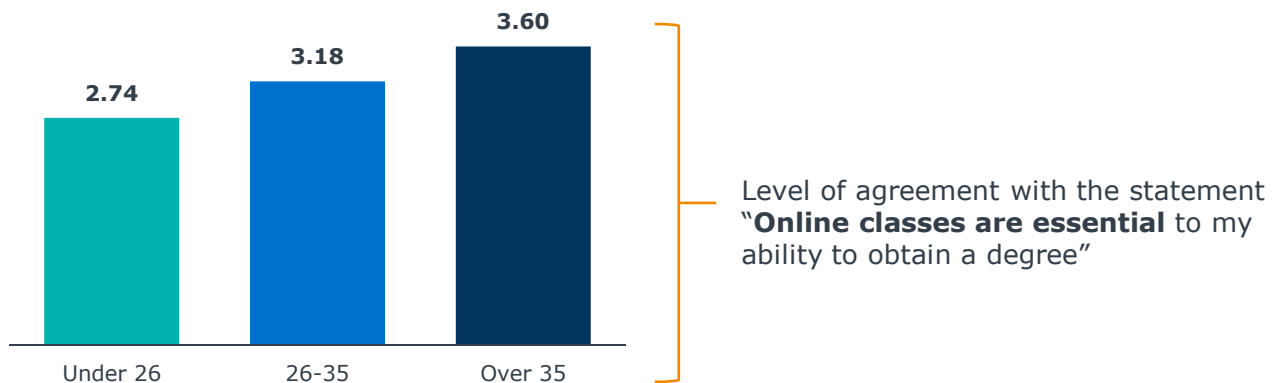


Perceptions of Quality of Online Options Vary by Age

Older Adult Students Have Historically Viewed Online Programs More Positively

Trends in prospects' openness to online courses during COVID-19 align with findings from our winter 2020 survey, which showed that older adult learners have a more favorable perception of online courses than younger adult learners do. Older adult learners are more likely to say that online options are comparable in quality to traditional on-campus education and that faculty will be equally accessible in online and in-person environments. Furthermore, our winter 2020 survey indicated that older adult learners are more likely to believe that online classes are essential to their ability to attain a degree. It also reaffirmed findings from our 2019 survey that older students value flexible and online options, which allow them to balance family and professional obligations with their pursuit of education.

Figure 7: Older Students More Likely to View Online Options as Essential
Mean Scores by Age



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

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

Our 2019 survey research also showed that younger adult learners placed more importance on campus environment and on-campus support services than older adult learners did when considering programs. These findings indicate that younger prospects are more likely to question whether remote options offer the same level of value as on-campus options.

Doubts About Remote Learning

“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

Navigating Differing Perceptions of Online Education

Strategy Recommendations

As enrollment leaders recruit for programs offered online, including temporarily remote courses and fully online offerings, we recommend the following strategies for engaging prospects with differing perceptions of the value and quality of online education.

1 Tailor Your Marketing According to Students' Concerns and Preferences

To appeal to younger adult learners, marketing should highlight the value offered through your degree and address concerns about lack of on-campus support services. Now more than ever, messaging about return on education is essential to engage and recruit younger adult learners. Marketing for older adult learners should highlight the flexibility and potential for work-life balance that online options offer.

2 Vet Programs Carefully Before Taking Them Fully Online

An EAB survey of enrollment leaders in late March 2020 found that 65.1% planned to expand fully online graduate courses and programs in light of COVID-19. However, as our survey findings illustrate, online options will not be universally appealing. As institutions develop plans for new online courses and programs, it will be critical to ensure that they lay careful groundwork for successful and scalable programs.

We recommend prioritizing high-enrollment courses and building blocks for full degree programs. In addition, institutions should develop a prioritized course and program migration plan that can guide allocation of scarce instructional design resources. Enrollment leaders should also ensure that program learning objectives align to market demand and account for competitive intelligence, historical enrollment, and revenue performance.

Many Institutions Planning to Expand Online

65.1%

of enrollment leaders reported that their institution planned to expand fully online graduate courses and programs as a result of COVID-19



Prospects Will Approach the Application Process More Pragmatically Than Ever

PREDICTION

4

Adult Learners Remain Highly Pragmatic

A Tactical Approach to the Application Process

Our winter 2020 survey data reinforced findings from our previous survey research, showing that prospects approach the application process with a focused plan. We found that most adult learners apply to two or fewer schools and that a large majority enroll within six months of taking a graduate admissions test.

Applying with a Focused Plan

51.8%

Enrolled within 6 months of taking a graduate admissions test

62.9%

Applied to two or fewer schools

49.3%

Completed their application in two hours or less

Minimizing Time and Resources Spent Applying

Our 2020 survey findings also reaffirmed that adult learners seek to strategically limit the time and resources spent on the application process. One in two adult learners aged 26 or older reported completing applications in two hours or less. Many also reported being deterred by certain application requirements, with one in four prospects saying that they had decided not to apply to a specific school or program because of an application fee. In addition, 47% of adult learners who plan to enroll or who are currently enrolled said they had not taken a graduate admissions test, and 72% of respondents indicated that they knew where they would be applying before they took a graduate admissions test. These findings suggest that many prospects don't take a graduate admissions test until and unless they have confirmed that it's required by one of their top-choice programs.

Deterred by Application Prerequisites

Our research also showed that many adult learners seek to minimize wasted time on applications by applying only to schools at which they feel confident they'll be accepted. Almost 20% of prospects reported that they had decided not to apply to a school or program because of a GPA or degree prerequisite, and 14% said the same of credits prerequisites. While it's logical that prospects self-select based on listed requirements and prerequisites, many institutions are likely deterring prospects whom they would be willing to accept upon closer review despite not meeting all posted requirements, thus unnecessarily narrowing their prospect pool.

Figure 8: "Which application and admissions requirements (if any) influenced your decision not to apply to a specific school or program?"

Students Aged 26 and Older



Source: EAB research and analysis.

Minimizing Preenrollment Obstacles During COVID-19

COVID-19 Increasing Pragmatism

The pandemic has created new pressures and demands on many prospects' attention beyond their previous family or work obligations, including increased childcare responsibilities, concerns about their own health or the health of a family member, and shifts in their employment routine or responsibilities. With these new personal and professional stressors, combined with the fact that many students may have increased doubts about the value of a degree, we expect adult learners to behave even more pragmatically during the pandemic.

Making Tough Trade-Offs

"I want to continue education to better myself and others but when family, income, and health are more fragile than ever, priorities shift."

- Survey Participant

Application requirements and prerequisites can represent barriers that prevent prospects from applying, and these obstacles will disproportionately impact disadvantaged students. Eliminating certain nonessential requirements can be an important way to both widen your prospect pool and increase access.

Strategy Recommendations

When EAB conducted a poll of adult learner enrollment leaders in late March 2020, 32.6% of respondents reported their institution plans to relax standardized test requirements in response to COVID-19. While those institutions were considering amending application requirements as an immediate emergency response, all institutions should consider whether to make similar interventions long-term shifts in policy.

1 Assess Application and Program Requirements

To ensure that application requirements aren't creating undue hurdles for prospects, institutions should critically evaluate all application components, such as letters of recommendation, application fees, and essays. Furthermore, institutions should consider removing GPA requirements from their website to avoid deterring prospects who may qualify for admission given the opportunity for a complete application review.

Encouraged by Changes to Requirements

"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."

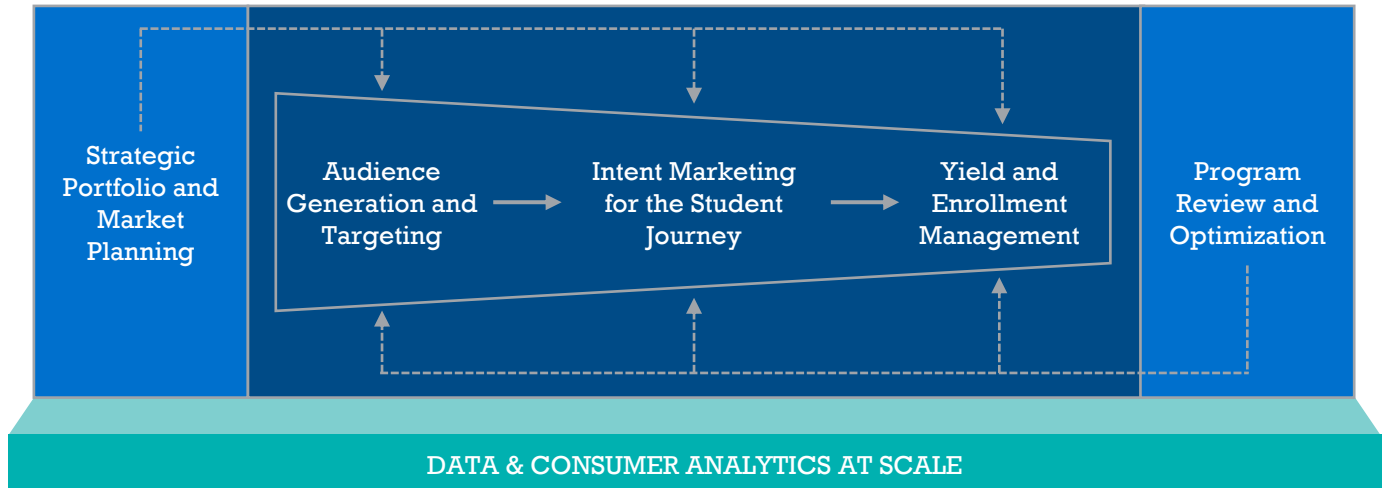
- Survey Participant

2 Compare Requirements and Prerequisites to Those of Competitors

As students are comparing and selecting programs, it's critical for institutions to understand how their application process compares to that of competitors. Analyze all application requirements and program prerequisites against those of top competitors to determine key differentiators and potential vulnerabilities.

Introducing EAB's Adult Learner Recruitment

EAB's strategic enrollment solution combines intent marketing, market research, and strategic consulting to fuel smart growth for graduate, online, and adult degree completion programs.



Strategic Portfolio and Market Planning

We provide rich market intelligence via our Professional and Adult Education Forum that synthesizes real-time labor market data with a variety of sources, including research interviews and enrollment conferral data. Our reports lead with actionable recommendations to help you validate demand, answer critical marketing and curriculum questions, and accelerate program development efforts.



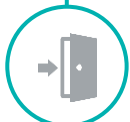
Audience Generation and Targeting

We help you expand your reachable audience to ensure that you can contact as many potential right-fit students as possible, early in their journey. Targeting sources include a national consumer database, test-taker lists, your institution's inquiry pool, young alumni and current undergraduates, and first-party digital platforms. Our targeting analysts help you optimize search parameters and define your markets to ensure that you maximize your reach.



Intent Marketing for the Student Journey

We engage prospective students at every stage of their journey from awareness to application. Using our national consumer database, we develop detailed student personas that inform marketing strategy. We design custom campaigns at scale according to student intent, which incorporate micro-surveys, responsive landing pages, behavioral campaign flows, data-informed creative, and a streamlined application experience.



Yield and Enrollment Management

We deploy a proprietary survey-based approach to help you determine accepted students' intentions, predict which students will enroll, and triage your outreach.



Program Review and Optimization

We conduct rigorous testing and research on an ongoing basis to identify highest-impact industry practices and maximize your results. We provide resources to help your organization plan for growth, and we evaluate marketing campaign performance to adjust strategy and optimize results.

To learn how EAB can help meet your growth goals, visit eab.com/ALR or email jocelynpowers@eab.com.

Research Methodology

Overview of Study

EAB's Adult Learner Recruitment division conducted two surveys of current and prospective adult learners in 2020 to learn about their enrollment motivations, preferences, and concerns. In addition to the survey data, findings in this report reflect insights from EAB research based on our partnership with 100+ graduate, online, and adult degree completion programs.

COVID-19 Adult Learner Pulse Survey, May 2020

This survey investigated changes in prospects' enrollment plans, employment and financial situations, and attitudes toward online learning during the coronavirus pandemic. The reported results include responses from 1,036 participants.

Participant Profile

Gender	Percentage
Female	68%
Male	32%
Other	<1%

Age	Percentage
Under 25	35%
26-35	43%
Over 35	22%

Employment	Percentage
Employed full-time	46%
Employed part-time	25%
Not employed	30%

Education	Percentage
Degree program	94%
Certificate program	6%
Individual course(s)	2%
Unsure at this time	<1%

Ethnicity	Percentage
African/African American/Black	20%
Asian/Pacific Islander	11%
Hispanic or Latinx	11%
Middle Easterner/West Asian	3%
Native American	1%
White/Caucasian	60%
Other	1%

Region	Percentage
Northeast	20%
South	37%
Midwest	11%
West	18%
Outside US	11%
Unknown	3%

Research Methodology

Adult Learner Survey, Winter 2020

This survey explored prospects' motivations for pursuing education further, sources used to gather information about programs, key decision criteria, preferred communication channels, and perceptions of online learning. The reported results include responses from 1,077 participants.

Participant Profile

Gender	Percentage
Female	56%
Male	43%
Non-binary	1%

Age	Percentage
Under 25	49%
26-35	24%
Over 35	27%

Region	Percentage
Northeast	20%
South	37%
Midwest	11%
West	18%
Outside US	11%
Unknown	3%

Ethnicity	Percentage
African/African American/Black	18%
Asian/Pacific Islander	11%
Hispanic or Latinx	13%
Middle Easterner/West Asian	3%
Native American	2%
White/Caucasian	60%
Other	1%

Employment	Percentage
Employed full-time	45%
Employed part-time	26%
Not employed	29%

Education

- **Highest level of education completed:** 10% had completed high school, 18% had completed some college, 9% had completed an associate degree, 29% had completed a bachelor's degree, 12% had completed some graduate studies, 17% had completed a master's degree, 3% had completed a doctoral degree, and 2% had completed some other professional credential.
- **Plans to pursue educational education:** 33% were either considering enrolling or planning to enroll in a program, 57% were currently enrolled in a program, 3% were enrolled at one time but were no longer enrolled, and 7% did not plan to continue their education.
- **Programs considered or pursued:** The participants who planned to enroll or were currently enrolled were considering or pursuing the following degrees and programs:

Other master's degree (e.g., MA, MS, MFA): 32%
Bachelor's degree: 30%
Doctorate (e.g., PhD, EdD): 19%
Medicine (e.g., MD, DDS, DPT): 6%

Master of Business Administration (MBA): 5%
Certificate or certificate/credential leading to a degree: 3%
Law (e.g., MA, JD, LLM): 1%
Other: 4%



We help schools support students
from enrollment to graduation and beyond

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right-fit students

➤ Support and graduate
more students



➤ Prepare your institution
for the future

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best practices

500+ Enrollment innovations
tested annually

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served

4 M+ Students supported
by our SSMS

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



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