



# **Enrollment Snapshot: Key Trends in the Graduate Market**

Adult Learner Recruitment



# Education's Trusted Partner to Help Schools and Students Thrive



## Your Imperatives Determine Ours

### INSTITUTIONAL STRATEGY

#### Prepare Your Institution for the Future

Executive guidance rooted in research to support your strategic priorities

### MARKETING AND ENROLLMENT

#### Achieve Your Enrollment and Growth Goals

Tailored partnerships powered by a recruitment ecosystem with unrivaled reach to enroll your future classes

### STUDENT SUCCESS

#### Build a Student-Centric Campus

Technology trusted by 850 schools to retain, graduate, and empower more students

### DIVERSITY, EQUITY, AND INCLUSION

#### Advance DEI on Campus and in Your Community

Technology, research, and bold initiatives to strengthen your DEI strategy and eliminate equity gaps

### DATA AND ANALYTICS

#### Embrace Digital Transformation

Data and analytics solutions built for higher education to guide decisions and accelerate innovation

We partner with **2,500+** institutions to accelerate progress and enable lasting change.

**95%+** of our partners return to us year after year because of results we achieve, together.

## Asking a Question



## Brief Exit Survey



We'd appreciate your **feedback** on today's presentation.

# Today's Presenter



## **Beth Donaldson, MPA**

*Senior Consultant and Principal*  
EAB Adult Learner Recruitment



# Poll

## **Which of the following is your greatest priority with respect to your graduate and adult-serving programs?**

*Please select two*

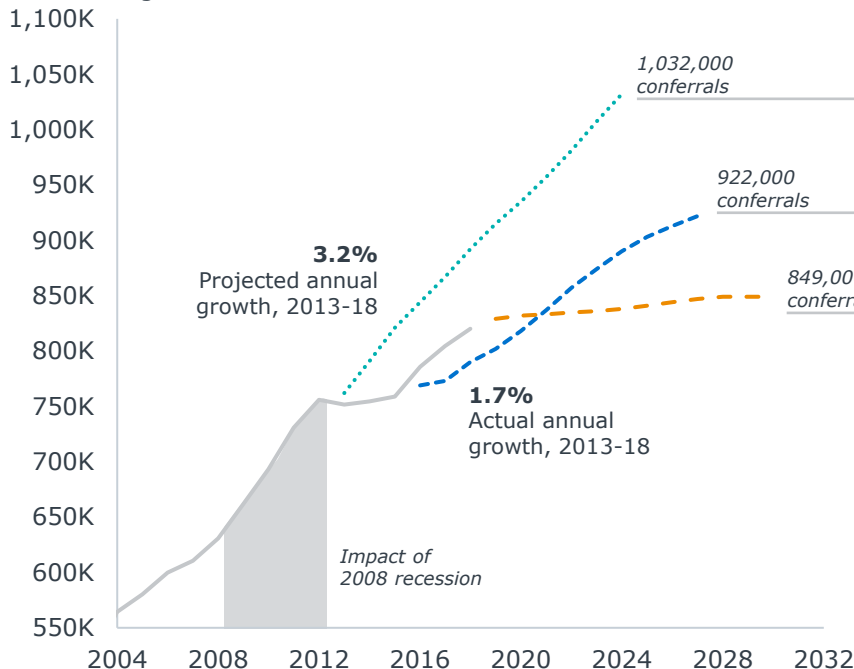
- Increasing enrollment in existing programs
- Launching new programs
- Updating existing programs to meet demand and grow enrollment
- Expanding online courses and program offerings
- Other (*please tell us in the Chat*)



# The Master's Degree Bubble Has Already Burst

## Lower Expectations for Growth Every Year Since 2013

Master's Degree Conferrals



10-Year Projections

**2.8%**  
 Projected Annual Growth  
 2014 - 2024<sup>1</sup>

**1.7%**  
 Projected Annual Growth  
 2017 - 2027<sup>1</sup>

**0.2%**  
 Projected Annual Growth  
 2020 - 2030<sup>1</sup>

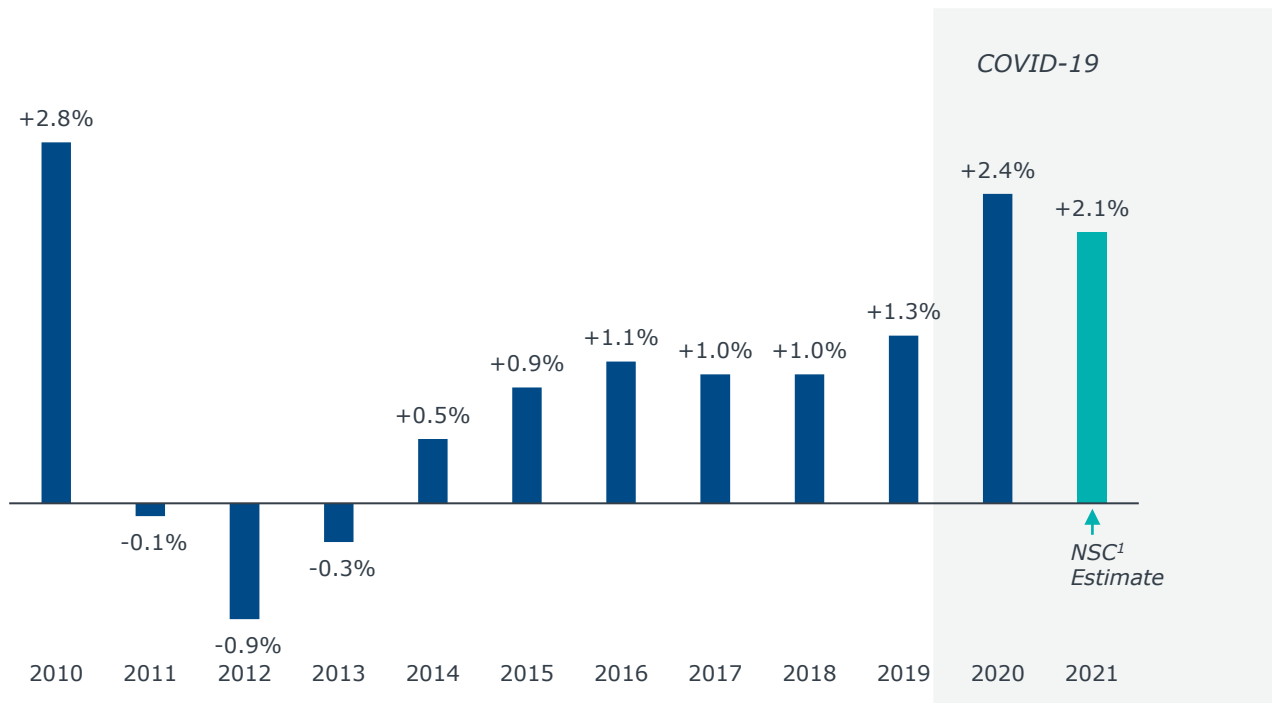
1) The graph includes a 'year 0' for each projection. These 'year 0s' (2013, 2016, and 2019) are actual figures, not projections.

# A Booster Shot for Graduate Enrollments



## Graduate Enrollments Grew at Fastest Rates in Nearly a Decade Through Pandemic

*Year on Year Growth of Total Graduate Enrollments – All 4-Year Institutions*



1) National Student Clearinghouse

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**Who is benefitting most from this growth?**

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# Not All Institutions Experienced Growth

## While Many Grew, More than a Third of Institutions Faced Declines

*Distribution of grad enrollment growth/decline, 2019 to 2020*



**47%**

**See Healthy Growth**

*Greater than 2.5%*



**19%**

**Remain Steady**

*-2.5 to +2.5%*



**34%**

**Slump in Enrollments**

*Less than -2.5%*

## What's behind these trends?

Student Demographic Shift

Affordability

Institutional Pandemic Messaging

Expertise in Online Education

Distance from Home

New Entrance Requirements

Institution Size

Program Offerings

Changing Student Demand

Changing Labor Market Conditions

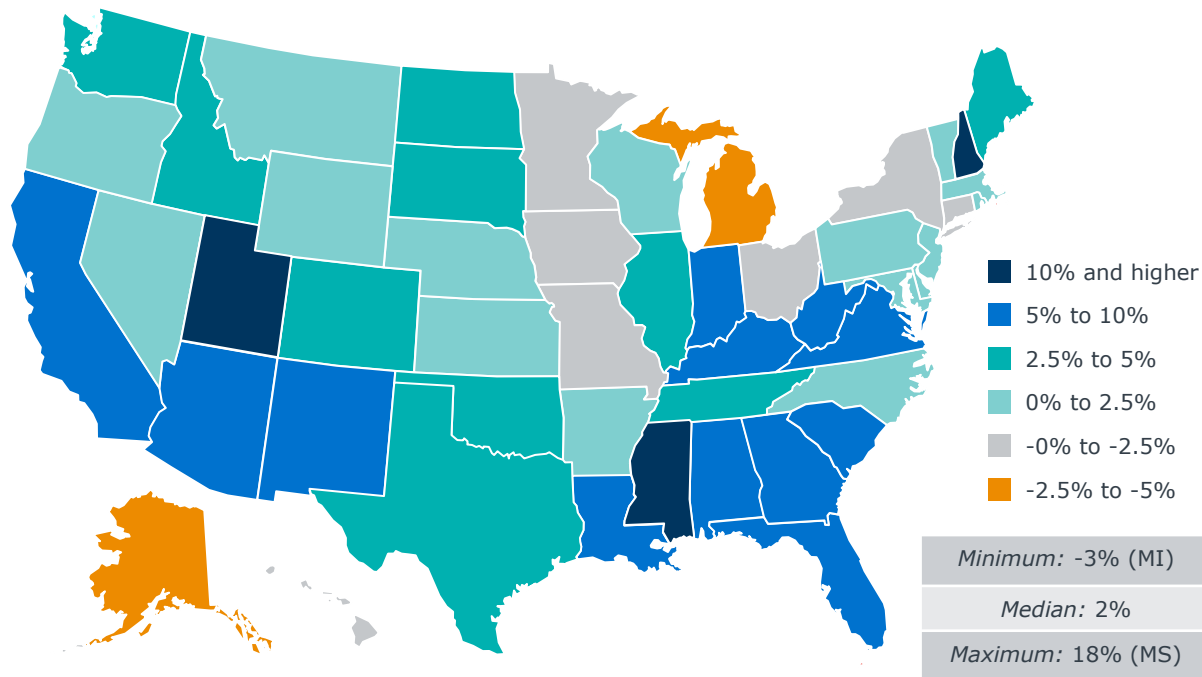
Dependence on Intl. Enrollments

# Diverging Fortunes by Region



## But Most Institutions Experienced Growth, Regardless of Location

Percentage Change in Graduate Enrollments, By Location of Institution from Fall 2019 – Fall 2020



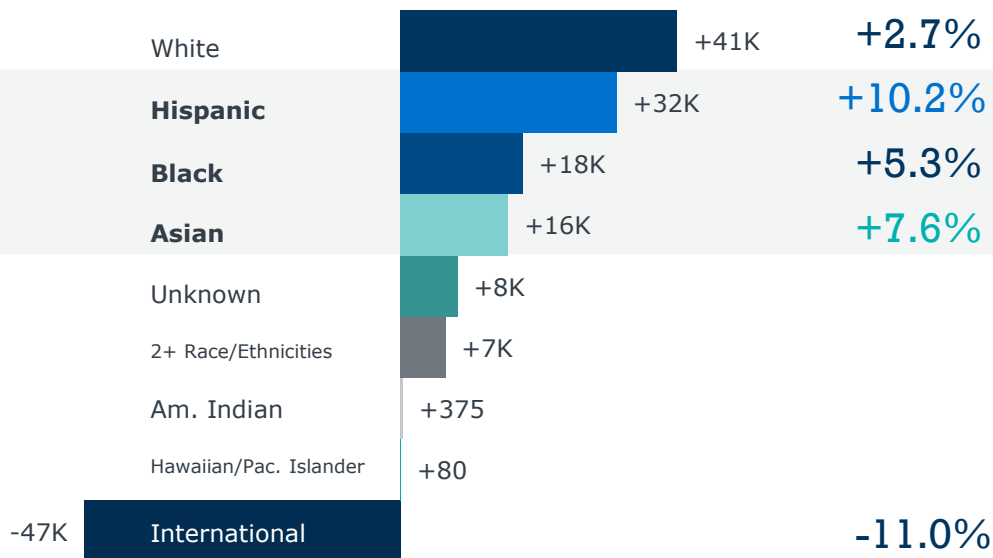
Source: EAB analysis of enrollment data from IPEDS Fall Enrollment Surveys 2010-2020, EAB interviews and analysis.

# Domestic Diversity Push Cushioned Intl. Slump



## Big Increases Among Hispanic, Black, and Asian Grad. Students Drove Graduate Enrollments to All-Time Highs, Despite International Decline

*Change in Graduate Enrollment by Race/Ethnicity: Fall 2019 to Fall 2020*



# Students Increasingly Prioritize Class Diversity



**“In terms of your enrollment decision, please indicate the importance of the following factors.”**

*Mean score for “diverse student body” on a scale of 1-5 (1=not important, 5=extremely important)*



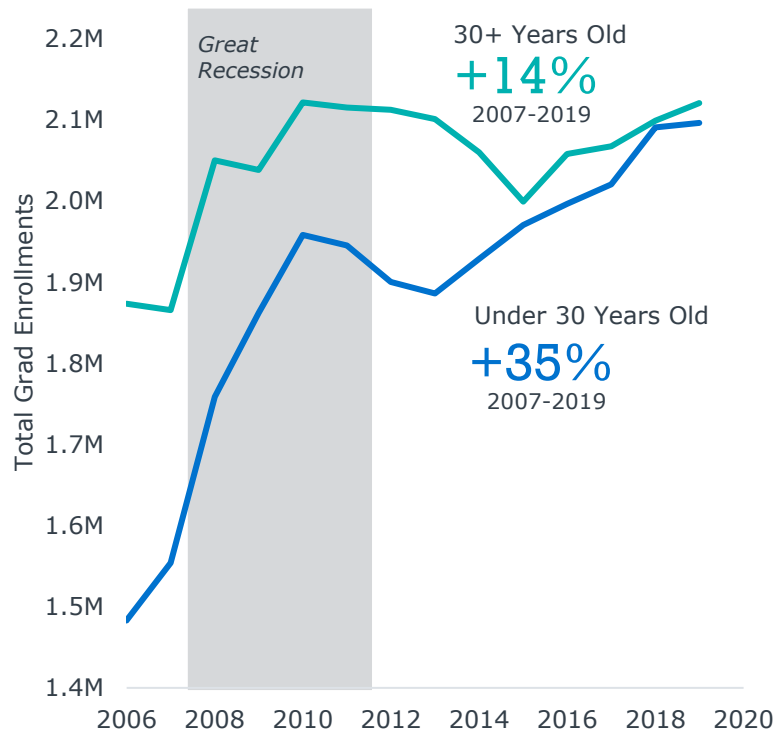
“ It starts with a commitment from the institution that they believe in diversity at every level and that they’re going to make a commitment to not only increase it but support these students through completion.”

*- JoAnn Canales, Dean of the College of Graduate Studies and Professor, Texas A&M University-Corpus Christi*

# A Permanent Shift to Younger Grad Students

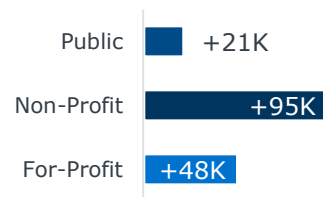


Change in Graduate Enrollments Since 2007 by Age Group



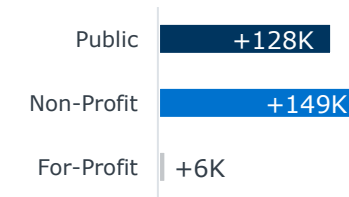
## Private Institutions Account for Increase in Older Grads

Increase in graduate enrollments 30+ years old 2007-19 by sector



## Younger Graduate Students Shun For-Profit Institutions

Increase in graduate enrollments under 30 years old 2007-19 by sector

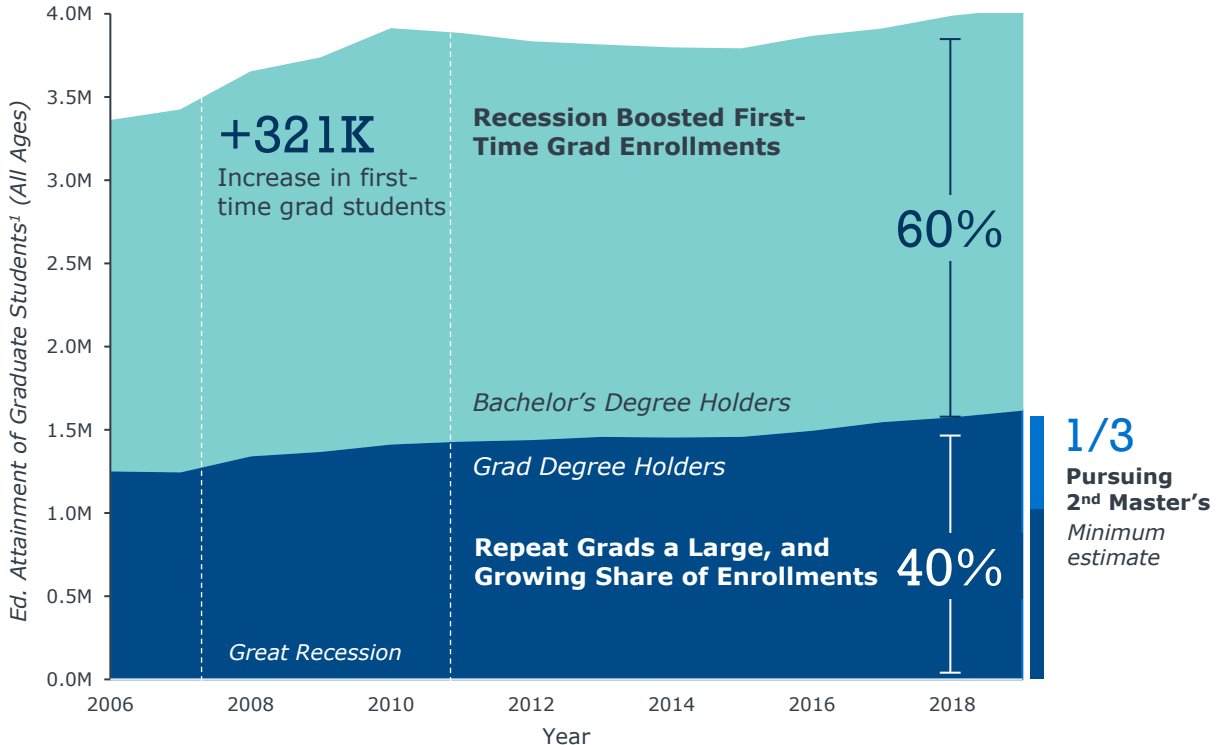


Source: 2006-18 ACS Survey Data, IPUMS USA, University of Minnesota; EAB interviews and analysis.

# Repeat Master's Students Surprisingly Common



Students Enrolled in Graduate Education by Prior Educational Attainment



1) Includes both academic and professional graduate programs  
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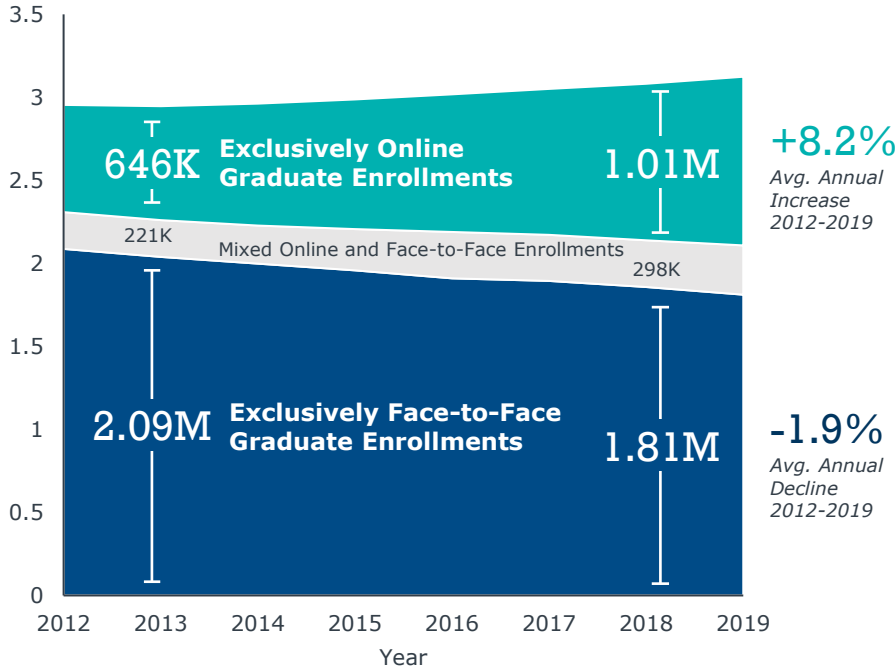
Source: 2006-19 ACS Survey Data, IPUMS USA, University of Minnesota; Hironao Okahana, Enyu Zhou, and Janet Gao, 'Graduate Enrollment and Degrees 2009 to 2019' Council of Graduate Schools; EAB interviews and analysis.

# Online Grad Ed Growing Fast Prior to COVID

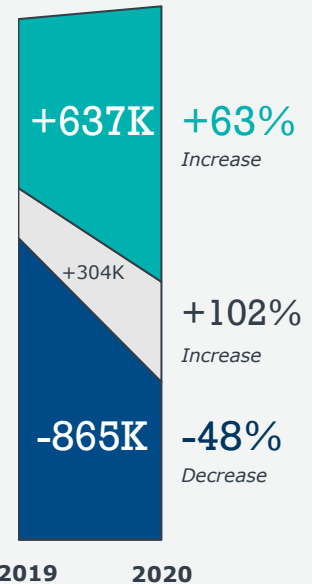


## How Much of The Pandemic's Shift Online Remains Permanent?

Graduate<sup>1</sup> Enrollments 2012-2020: Exclusively, Some, and No Online<sup>2</sup> Courses



### The Pandemic: Half of Face-to-Face Grad Enrollments Shift Online



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

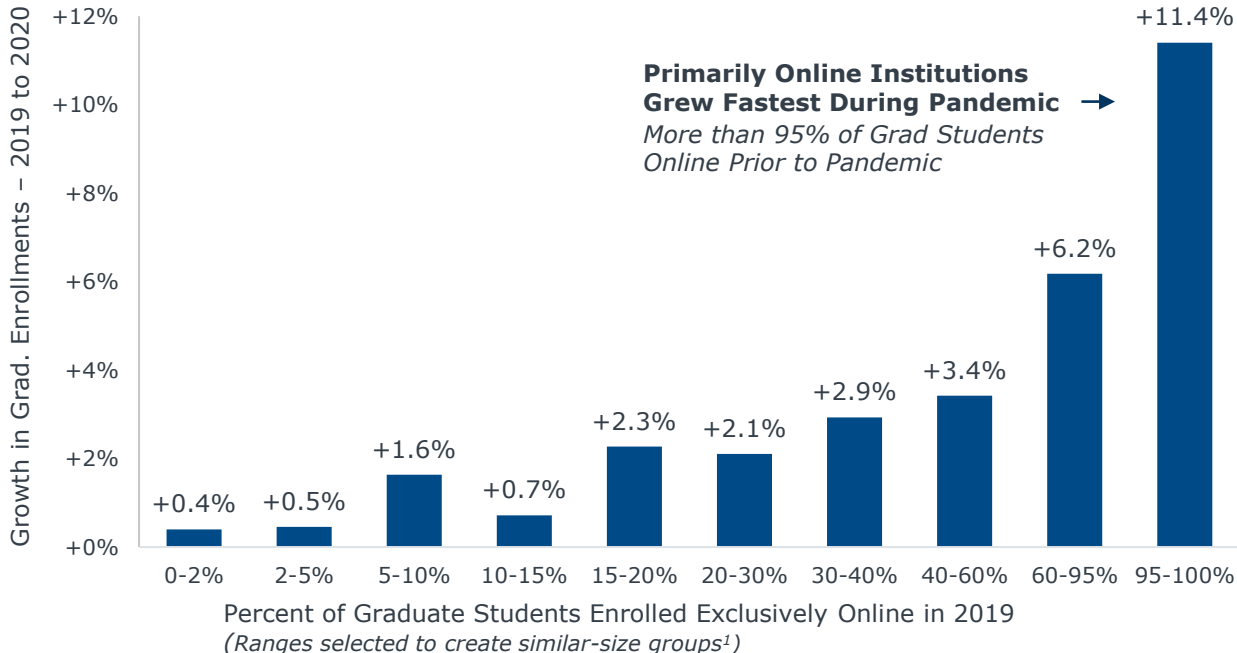
2) Recorded as 'Distance Education' in IPEDS data

# More Online Offerings Meant More Growth



## Grads Flocked to Established Highly-Online Institutions in 2020

*Growth in Graduate Enrollments 2020 vs. 2019 by Online Intensity in 2019*



1) Each group is comprised of institutions that enrolled approximately 300,000 graduate students in 2019

2) We excluded institutions that enrolled zero graduate students in 2020



# The Online Quality Debate



## What Adult Learners “Shop” On

<i>Characteristics</i>	<i>Preferences</i>
Likely Working	Accelerated Timeline
Price-Sensitive, Discerning Shoppers	Skills Over Credential
Family Obligations	Personal Interactions —on Their Schedule
Less Willing to Move	Asynchronous Programs

## Redefining What Quality Means



### *Traditional Definitions*

- Reputation
- Faculty Expertise



### *New Definitions*

- Salary outcomes, career advancement
- Flexibility in modality, scheduling, payment
- 24/7 student services
- Communication channels with faculty
- Virtual interactions with peers, advisers

## Risks of Equating Online with Low Quality

✘ R1 med school risks not accepting own undergrads, preferences F2F prerequisites over online. Almost all undergrads take at least one online course

✘ Common for institutions not to accept credit from their own continuing education units, even when taught by same faculty as F2F courses

# Develop an Effective Pricing Strategy



## Program Cost Continues to Be the Primary Barrier to Enrollment

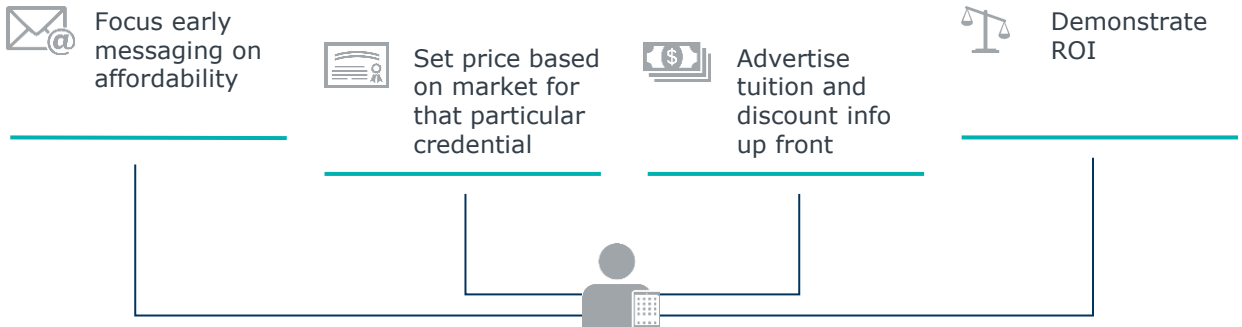
47.7%

of respondents who do not plan to pursue graduate education said “more affordable tuition” would lead them to do so

48.0%

of African, African American, and Black students surveyed said the “high cost of attendance” is their main enrollment obstacle

## Strategically Price Graduate, Online, and Adult Education Programs



# Connect Adult Learners to Support Services



## Available Support Services Impact Students' Enrollment Decisions

*"In terms of your enrollment decision, please indicate the importance of the following factors."*

Top Criteria	Mean
Online support services	3.70
Length of program/Time required for degree completion	3.69
Full-time program	3.69
Student support services	3.49

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Which disciplines are experiencing the most growth?

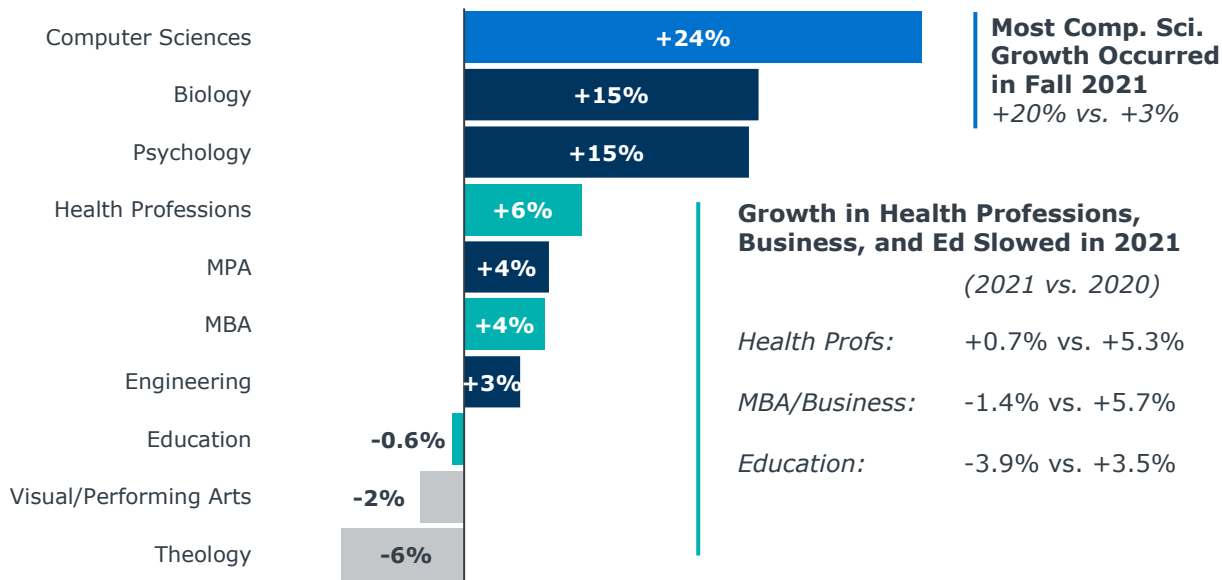
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# Bitcoin, Biology, and Burnout?



**Grad enrollment surged in computer sci., biology, and psychology. But for many other core programs, the boom has already slowed.**

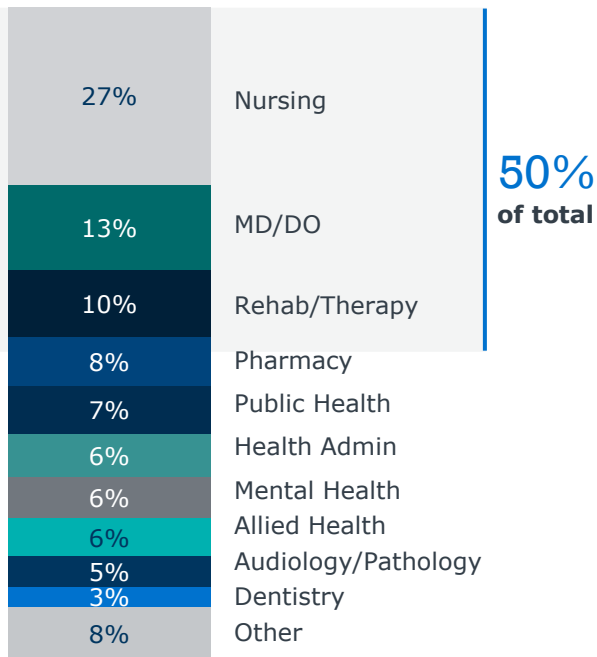
*Change in Estimated Master's Degree Enrollments by Major From Fall 2019 to Fall 2021*



# Health Profession MVPs Continue to Drive Growth

## Graduate Health Professions Mostly Nursing, MD/DO, and Therapeutic Degrees

*Distribution of Degrees Conferred in Health Professions in 2020*



## Nursing & Allied Health Drove Recent Growth

*Fastest & Slowest Growing Degrees Fields: 2017-2020*

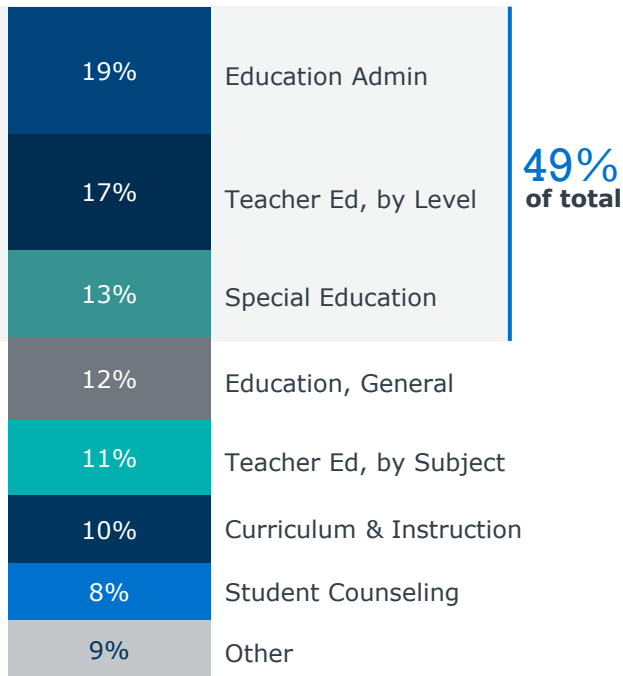
Degree	Avg. Annual Growth	Total Change
Nursing	+4.5%	+7.1K
Allied Health	+9.0%	+2.7K
MD/DO	+2.5%	+2.0K
Health Admin.	+4.8%	+1.8K
Pharmacy	-0.7%	-0.3K

# Educators Now Look to Grad Ed to Change Roles



## Education a Varied Degree Market, but Specialized Training Takes Main-Stage

*Distribution of Degrees Conferred in Education Professions in 2020*



## Media, Special Education, and Admin Studies Attract New Students

*Fastest & Slowest Growing Degrees Fields: 2017-2020*

Degree	Avg. Annual Growth	Total Change
Special Education	+3.8%	+2.1K
Educational Media Design	+11.7%	+1.8K
Education Admin	+2.1%	+1.7K
Education, General	-3.6%	-2.2K
Teacher Ed, by Subject	-1.2%	-0.6K

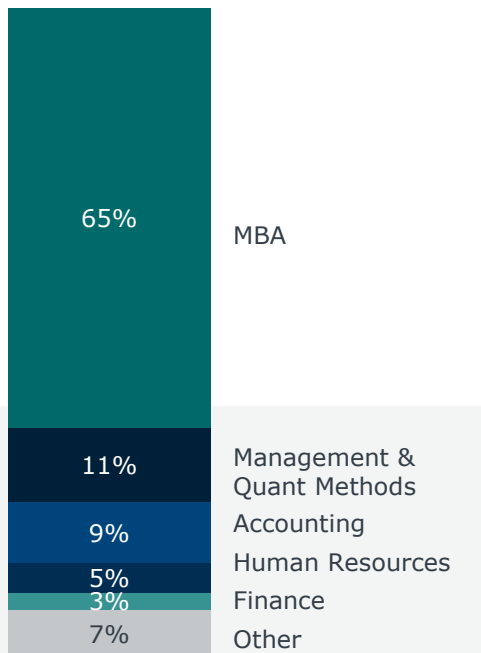
Source: EAB analysis of NCES Integrated Postsecondary Education Data System (IPEDS) data.

# Little Diversity, Slowing Growth for Business



## Majority of Business Graduate Conferrals from One Degree: The MBA

*Distribution of Degrees Conferred in Business Professions in 2020*



## From MA to MS: Analytic Degrees Only Significant Source of Growth for Business

*Fastest & Slowest Growing Degrees Fields: 2017-2020*

Degree	Avg. Annual Growth	Total Change
Management & Quant Methods	+52.9%	+16.6K
Accounting	-3.8%	-2.3K
Finance	-9.8%	-1.9K
HR	-0.6%	-0.2K
MBA	-0.2%	-0.9K

### Specialized Business Fields

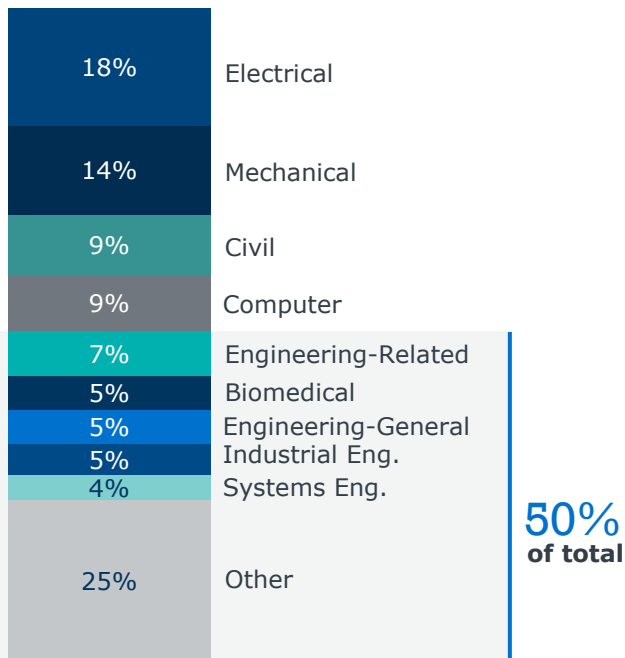
Source: EAB analysis of NCES Integrated Postsecondary Education Data System (IPEDS) data.



# Engineering Hit by Falling International Enrollment

## Niche Learning Valued with 1/2 of All Conferrals Spread Over 45 Degree Types

*Distribution of Degrees Conferred in Engineering Professions in 2020*



## Engineering Fields Shrink as International Enrollment Stalls and Industries Offshore Services

*Fastest & Slowest Growing Degrees Fields: 2017-2020*

Degree	Avg. Annual Growth	Total Change
Systems Engineering	+2.4%	+0.1K
Electrical Engineering	-8.9%	-3.1K
Mechanical Engineering	-3.6%	-0.9K
Industrial Engineering	-7.1%	-0.7K
Computer Engineering	-4.5%	-0.7K
Civil Engineering	-4.1%	-0.7K

Source: EAB analysis of NCES Integrated Postsecondary Education Data System (IPEDS) data.

# Key Takeaways

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- 1 Graduate enrollment grew at its fastest rate in nearly a decade during the pandemic, but not all institutions benefited equally
- 2 Enrollment among students of color increased, while international student enrollment fell
- 3 Growth in online enrollment fueled increases in graduate enrollment overall—and institutions with a strong presence online pre-pandemic enjoyed the greatest growth
- 4 Enrollment in computer science, biology, and psychology programs increased, but enrollment in other core programs has already slowed

# Interested in More?

## I'd like to speak further about...

- 1 Identifying online, graduate, or adult education programs to launch or refresh
- 2 Optimizing graduate and online programs for growth
- 3 Generating leads for graduate and online programs
- 4 Developing marketing campaigns to reach and recruit graduate and online students



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Transformation**

+

**Unrivaled  
Access**

+

**Marketing  
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+

**Intelligent  
Analytics**

**170+ Partner Institutions**

**No Two Partnerships Alike**

# Q&A



## **Beth Donaldson, MPA**

*Senior Consultant and Principal*  
EAB Adult Learner Recruitment

## **Thank You for Joining Us!**

Please take our brief webinar exit survey



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