

The New Graduate Enrollment Playbook

Data, Insights, and Strategies for the Next Enrollment Era

2026
GEM
SUMMIT
BALTIMORE MD
APRIL 8-11, 2026
Marriott Baltimore Waterfront



Today's Presenters



State of the Union: Graduate, Online, and Adult Education

*Beth Donaldson, Managing Director,
Consulting Services*



Decoding the Graduate and Adult Student Mindset

*Todd Heilman, Senior Consultant &
Principal*



Differentiating Your Graduate Programs in a Crowded Market

Val Fox, Consultant & Principal

State of the Union: Unpacking Trends in the Graduate Enrollment Landscape

State of the Market

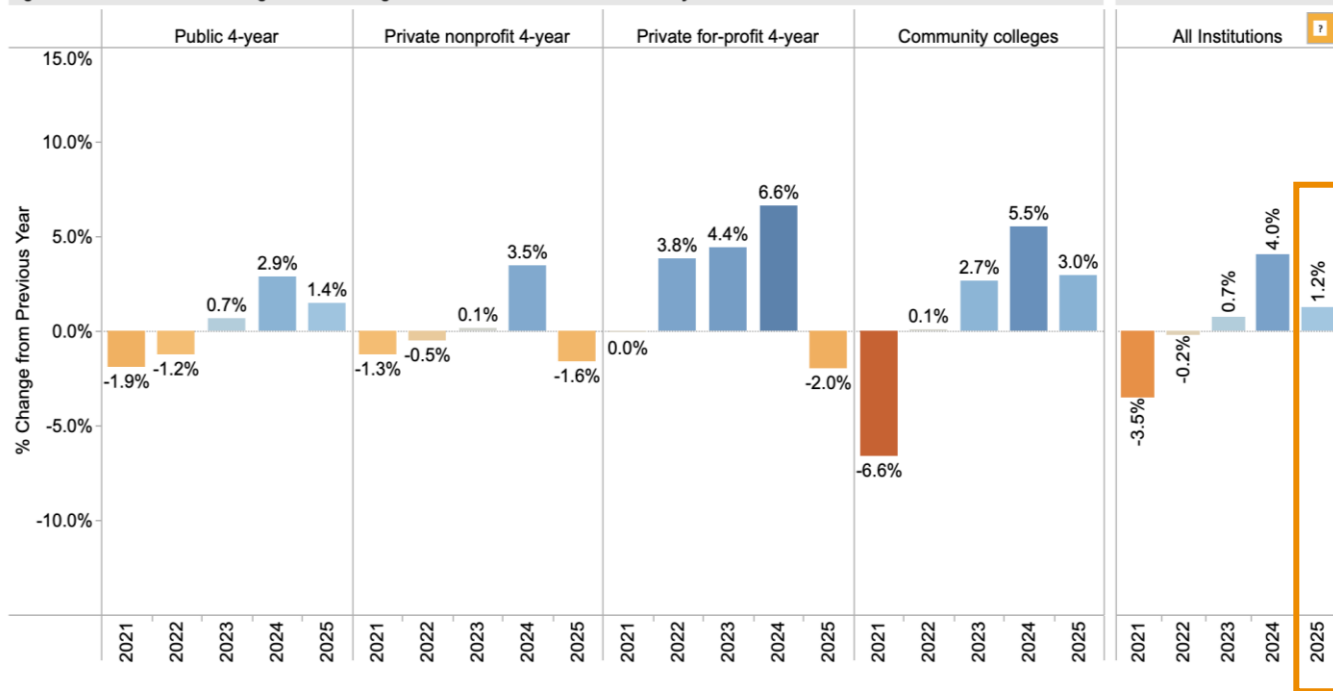


Fall 2025 Undergraduate Enrollment Highlights



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Figure 2.1 Annual Percent Change in Fall Undergraduate Enrollment for All Students by Sector



Some College, No Credential Population



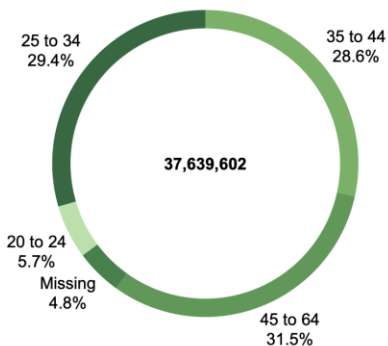
Who Makes Up the SCNC Population?

How Many SCNC Students are Currently Under 65?

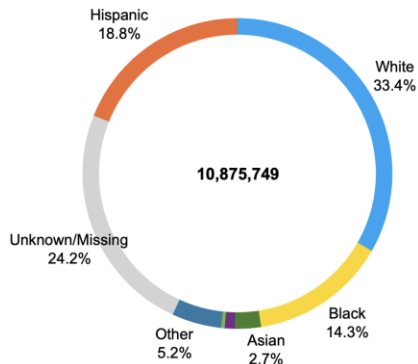
37,639,602

SCNC Demographic Breakdowns

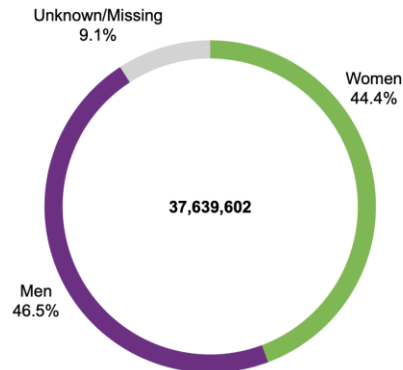
by Current Age
(as of July 31st, 2024)



by Race/Ethnicity



by Gender



Some College, No Credential Student Outcomes



Re-Enrollees (Under 65)

7

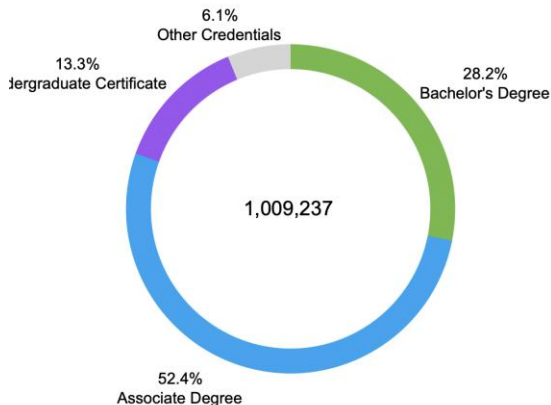
How Many SCNC Students Re-Enrolled in 2023-24?

1,009,237

What Was the Re-Enrollment Rate in 2023-24?

2.7%

What Types of Credentials Did Re-Enrollees Seek?



How Did the Credential They Re-Enrolled in Compare to the Types of Credentials They Were Pursuing Before Stopping Out?

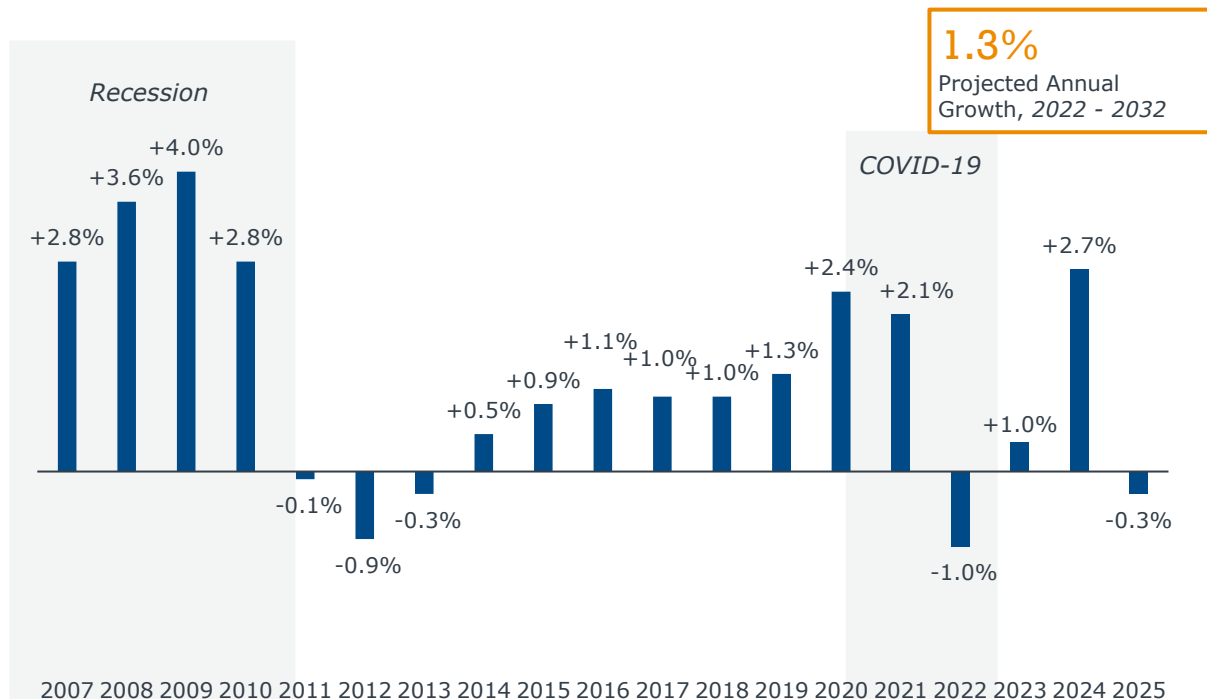
Credential at Last Enrollment	Credential at Re-Enrollment				Grand Total
	Bachelor's Degree	Associate Degree	Undergraduate Certificate	Other Credentials	
Bachelor's Degree	56.5%	31.4%	7.8%	4.4%	100.0%
Associate Degree	17.6%	66.6%	12.1%	3.7%	100.0%
Undergraduate Certificate	15.1%	47.2%	32.6%	5.1%	100.0%
Other Credentials	26.5%	47.3%	14.9%	11.4%	100.0%

Grad Enrollment Has Declined



Are We Already Seeing Recession-Like Graduate Enrollment Growth?

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



1) National Student Clearinghouse..

Fall 2025 Top Graduate Programs: National Trends



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Figure 6.1 National Graduate Enrollment in Top 20 Major Field Families



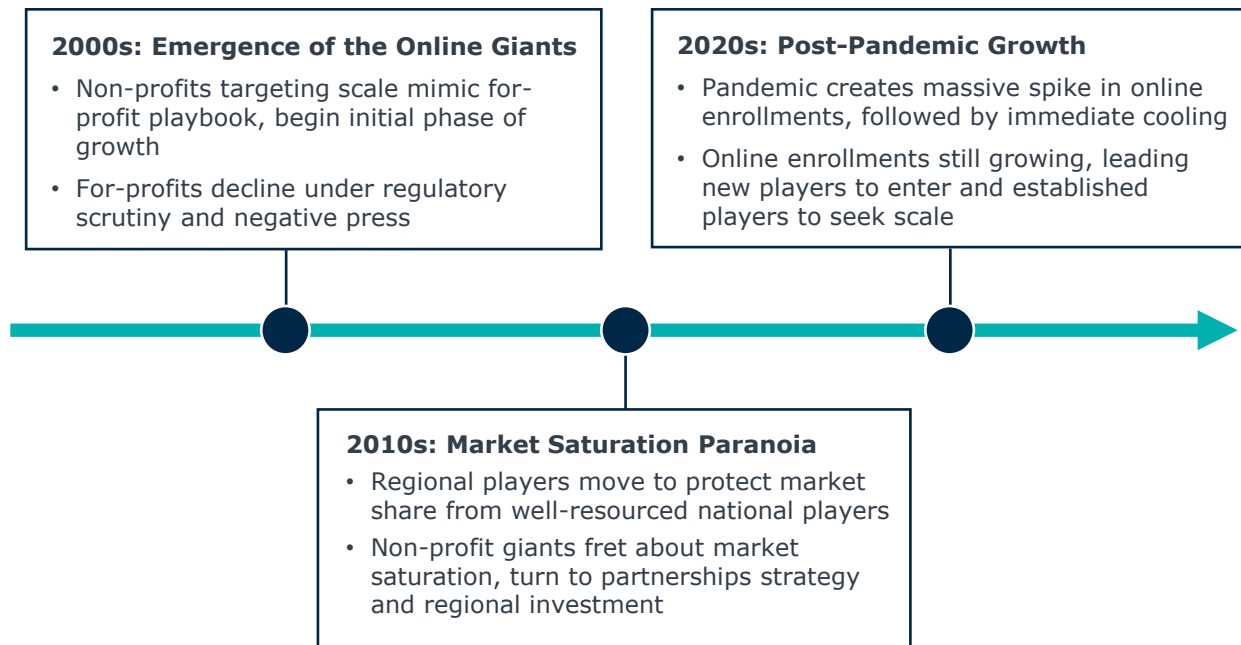
	2020		2021		2022		2023		2024		2025	
	Enrollment	% Change from Previous Y..	Enrollment	% Change from Previous Y..	Enrollment	% Change from Previous Y..	Enrollment	% Change from Previous Y..	Enrollment	% Change from Previous Y..	Enrollment	% Change from Previous Y..
Health Professions a..	716,436		724,806	1.2%	712,002	-1.8%	710,638	-0.2%	745,723	4.9%	760,869	2.0%
Business, Manageme..	485,402		484,105	-0.3%	458,661	-5.3%	448,913	-2.1%	456,033	1.6%	457,089	0.2%
Education	465,168		455,976	-2.0%	431,560	-5.4%	422,739	-2.0%	427,918	1.2%	424,062	-0.9%
Computer and Inform..	140,196		163,070	16.3%	193,252	18.5%	218,843	13.2%	220,885	0.9%	190,002	-14.0%
Engineering	158,804		168,201	5.9%	176,139	4.7%	175,977	-0.1%	180,129	2.4%	176,159	-2.2%
Psychology	140,603		148,328	5.5%	148,454	0.1%	147,690	-0.5%	148,657	0.7%	157,313	5.8%
Legal Professions an..	131,801		139,810	6.1%	136,712	-2.2%	137,491	0.6%	137,096	-0.3%	142,299	3.8%
Public Administration ..	130,400		133,164	2.1%	126,876	-4.7%	122,482	-3.5%	127,399	4.0%	134,077	5.2%
Biological and Biome..	95,547		100,361	5.0%	103,077	2.7%	106,103	2.9%	110,354	4.0%	111,991	1.5%
Multi/Interdisciplinary ..	38,445		45,198	17.6%	59,155	30.9%	75,448	27.5%	88,751	17.6%	89,139	0.4%
Social Sciences	61,483		62,218	1.2%	60,884	-2.1%	58,953	-3.2%	58,322	-1.1%	58,265	-0.1%
Physical Sciences	53,727		54,870	2.1%	54,679	-0.3%	55,001	0.6%	56,023	1.9%	55,859	-0.3%
Visual and Performin..	48,705		49,389	1.4%	48,247	-2.3%	46,628	-3.4%	46,127	-1.1%	45,213	-2.0%
Theology and Religio..	45,965		44,470	-3.3%	44,226	-0.5%	45,973	4.0%	46,944	2.1%	45,045	-4.0%
Mathematics and Stat..	35,400		36,925	4.3%	36,879	-0.1%	36,701	-0.5%	36,701	0.0%	35,699	-2.7%
Agriculture, Agricultur..	29,148		29,920	2.6%	30,364	1.5%	31,086	2.4%	32,183	3.5%	32,807	1.9%
Security and Protecti..	31,977		31,634	-1.1%	28,767	-9.1%	27,153	-5.6%	28,098	3.5%	28,984	3.2%
Communication, Jour..	29,089		30,541	5.0%	29,009	-5.0%	27,615	-4.8%	27,636	0.1%	27,409	-0.8%
English Language an..	29,281		29,639	1.2%	27,326	-7.8%	25,922	-5.1%	25,434	-1.9%	24,801	-2.5%
Parks, Recreation, Le..	24,042		23,425	-2.6%	21,366	-8.8%	20,734	-3.0%	21,277	2.6%	21,093	-0.9%

The Online Landscape



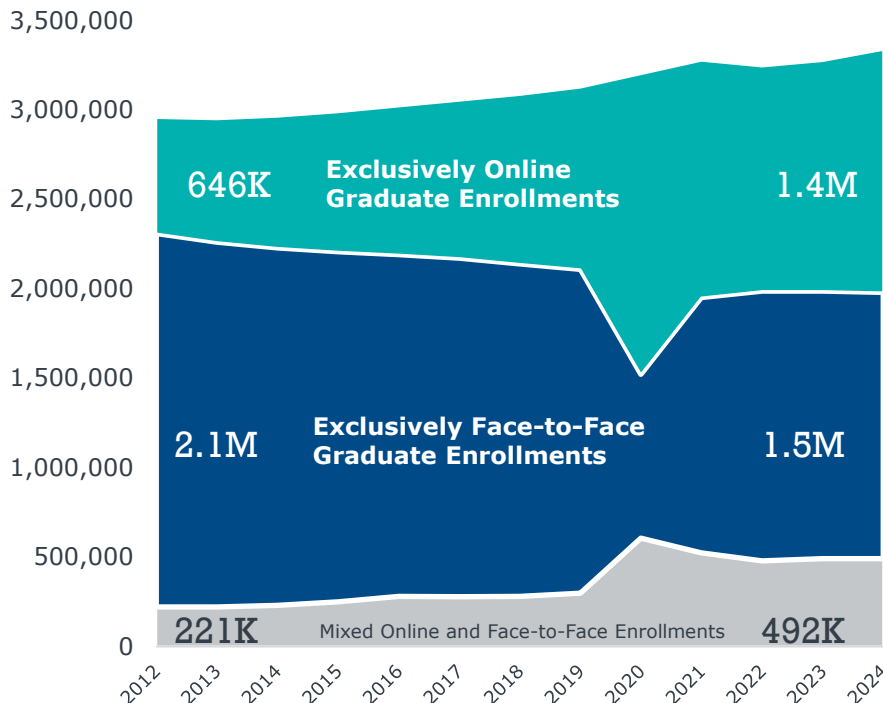
A New Age of Online Expansion?

Pandemic Lessened Fears About The End of Online Growth



Long-Term Shift to Online & Hybrid Solidifies

Graduate¹ Enrollments 2012-2024: Exclusively, Some, and No Online² Courses



Avg. Annual Growth
Exclusively Online

+6.7%

Pre-Pandemic
2012-2019

+6.0%

Recent Growth
2019-2024

+194K

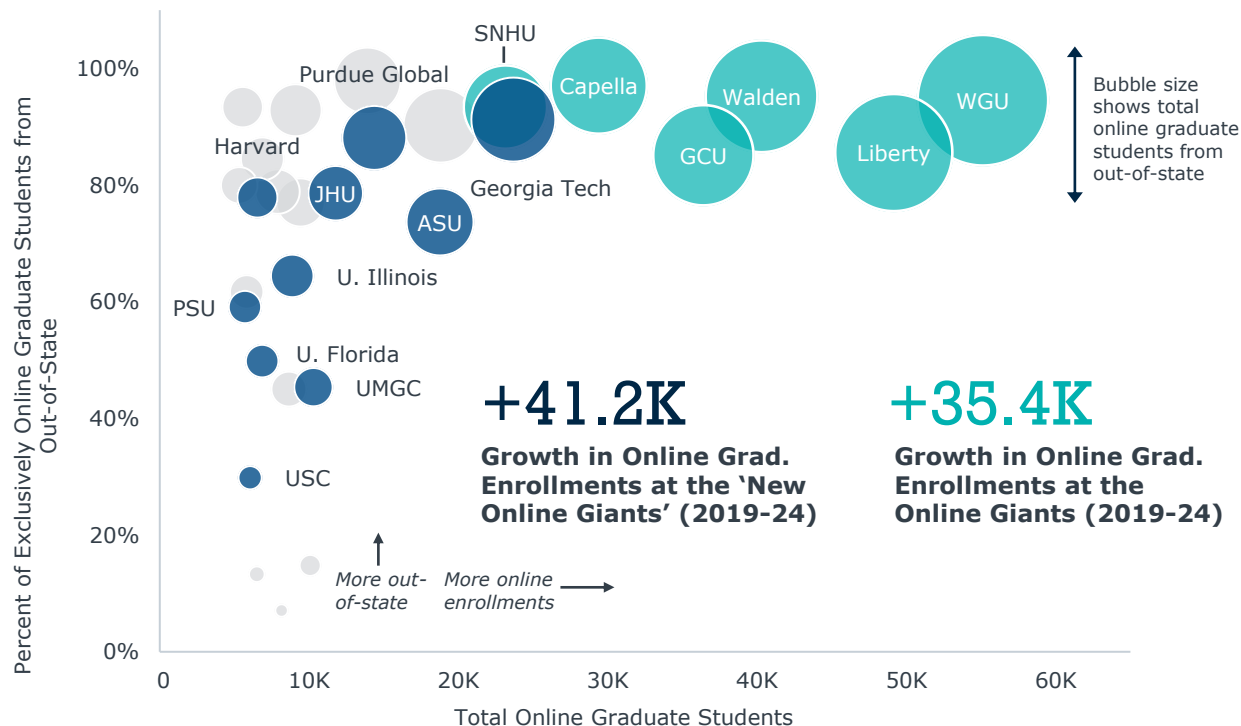
Increase in Graduate
Students Taking
Both Online and F2F
Courses 2019-2024

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

2) Recorded as 'Distance Education' in IPEDS data

The Online Grad Market Consolidates at Scale

Institutions With More Than 5,000 Exclusively Online¹ Graduate Enrollments, Fall 2024
Total Exclusively Online Graduate Enrollments and Percent From Out-of-State



1) Recorded by IPEDS as exclusively distance enrollments.

Sample Growth Goals: Outsized Goals Unmoored From Market Realities



Across Institution Types, Calls to Increase Online Enrollment 2x to 6x

**30K by
2030**

*Large public,
currently at 17K*

**170K by
2029**

*Non-profit
online giant*

**11K by
2028**

*Regional public
planning to double
online enrollment*

**60K by
2030**

*Large public,
currently at 9k*

2x

*Small regional
private, currently
at 1k*

4x

*Private selective,
currently at 4K*

3x by 2030

*Large public,
currently at 8K*

1M

*Non-profit
online giant*

Navigating New Headwinds

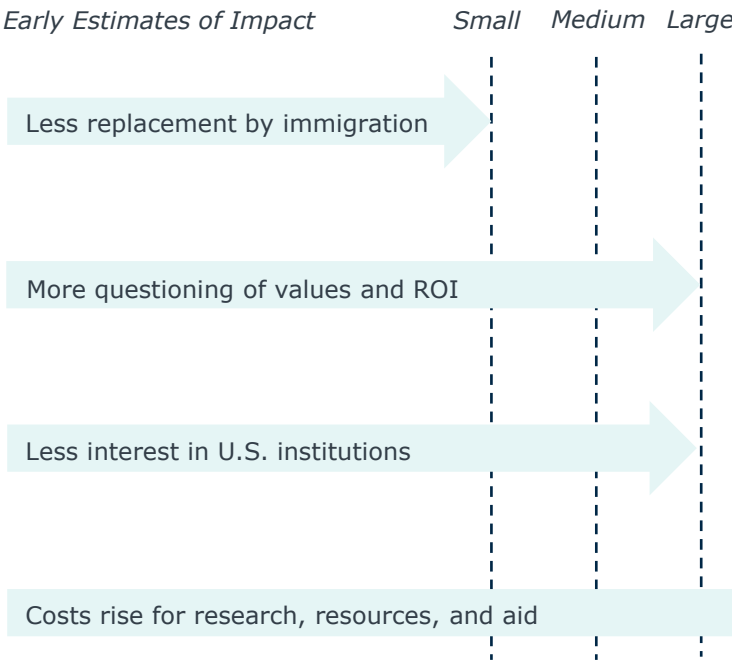


Our Focus for Today

Considering the Impact of the New Administration on Persistent Challenges

Four Market Headwinds

Likely Impact of Administration Policies



Demographic Decline



Crisis of Confidence



International Market Volatility



Revenue Constraints

Show of Hands...

Which of these headwinds is most concerning to you?

- Demographic decline and non-consumption
- Crisis of confidence in higher education
- International market reshuffle
- Compounding cost creep





Demographic Decline

HEADWIND

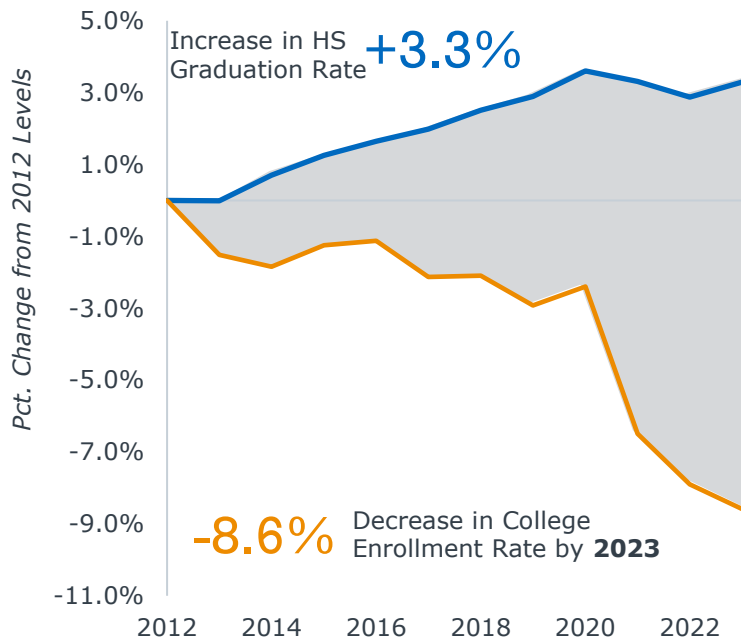
1

Non-Consumption Comes to Higher Ed



The Non-Consumer Undergraduate Market Getting Bigger Every Year

Pct. Change in K-12 to College Pipeline (2012 to 2023)



Decline in College-going Students Outstripped the Decline in HS Graduates

Change in 19- and 20-year-olds from 2012 to 2023 - ACS

-596K Total 19- and 20-Year-Olds

-276K High School Graduates

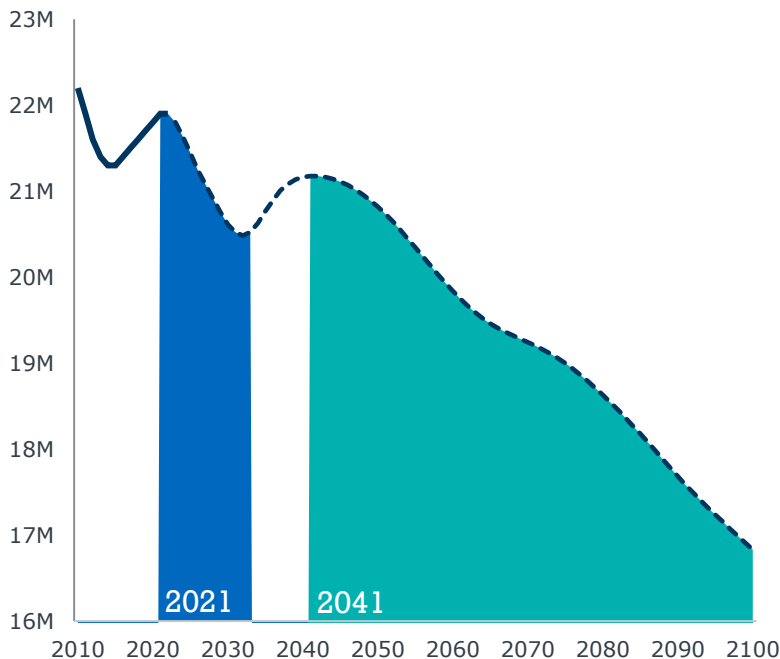
-708K Enroll in College

Fewer People Means Fewer Enrollments



Demographic Cliff Followed by Even Steeper Decline Through 2100

United States 15- to 19-Year-Old Population, IHME Projection



The Demographic Cliff

-6.3% or **-1.4M**

Decline in 15- to 19-year-old youth population, 2021-2032

Peak Population

-21% or **-4.3M**

Decline in 15- to 19-year-old youth population, 2041-2100

3x

*College-going population decline from 2041-2100 projected to be **~3x the size of pandemic-era enrollment losses***



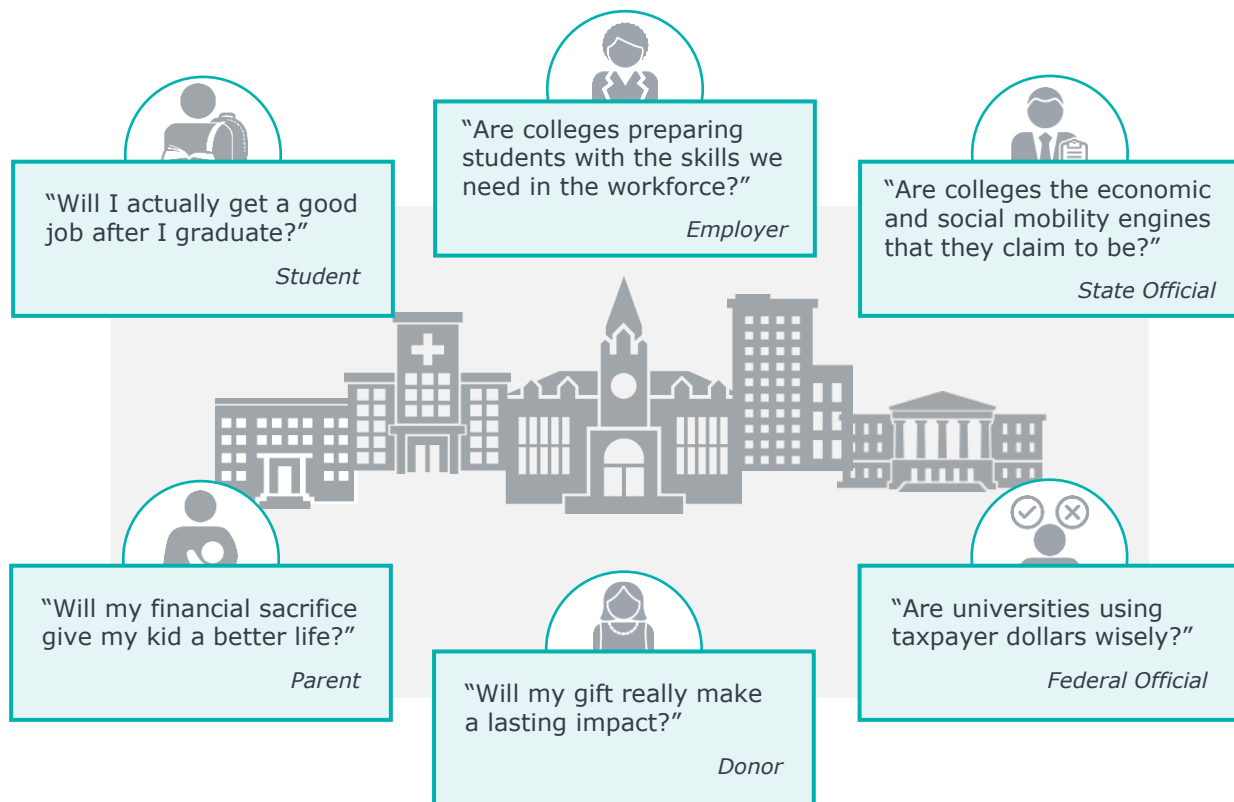
Crisis of Confidence

HEADWIND

2

Stakeholders Pushing Harder Than Ever on Outcomes

24



Voting With Their Feet

Behavioral Indicators Trending Towards Higher Pay, Career-Focused Options

Top Three Declines and Increases in Degree Conferrals¹, 2013-2023



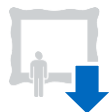
-21K

English conferrals, which is a 33% decrease



+143K

Computer Science conferrals, which is a 194% increase



-12K

History conferrals, which is a 32% decrease



+131K

Health Professions conferrals, which is a 33% increase



-11K

Social Sciences conferrals, which is a 6% decrease



+118K

Business Management conferrals, which is a 23% increase

Enrollment Growth at Polytechnic Schools Outpacing Large Publics, 2013-2023

16%

Overall enrollment growth at polytechnic institutions²

4%

Overall enrollment growth at large publics (>10K students)³

1) All degrees/certificates conferred at public and private, non-profit, 4-year institutions.

2) n=37. Representative examples: Cal Poly, Georgia Tech, Worcester Polytechnic Institute, South Dakota Mines.

3) n=363.

Fall 2025 Top Undergrad Programs: National Trends

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Figure 6.1 National Undergraduate 4-year Enrollment in Top 20 Major Field Families

	2020		2021		2022		2023		2024		2025	
	Enrollment	% Change from Previous Y.	Enrollment	% Change from Previous Y.	Enrollment	% Change from Previous Y.	Enrollment	% Change from Previous Y.	Enrollment	% Change from Previous Y.	Enrollment	% Change from Previous Y.
Business, Managemen...	1,574,568		1,546,711	-1.8%	1,564,698	1.2%	1,592,755	1.8%	1,677,829	5.3%	1,712,412	2.1%
Health Professions a...	1,020,520		1,007,472	-1.3%	961,003	-4.6%	950,673	-1.1%	1,024,989	7.8%	1,081,763	5.5%
Liberal Arts and Scie...	820,495		798,855	-2.6%	760,858	-4.8%	761,505	0.1%	733,813	-3.6%	702,812	-4.2%
Engineering	616,545		597,767	-3.0%	590,429	-1.2%	605,485	2.5%	635,360	4.9%	681,773	7.3%
Biological and Biome...	628,429		610,645	-2.8%	596,568	-2.3%	601,287	0.8%	619,745	3.1%	642,482	3.7%
Computer and Inform...	498,977		520,448	4.3%	574,333	10.4%	628,519	9.4%	659,708	5.0%	606,136	-8.1%
Psychology	498,717		517,743	3.8%	523,836	1.2%	523,790	0.0%	532,752	1.7%	530,638	-0.4%
Education	456,776		447,305	-2.1%	434,852	-2.8%	429,517	-1.2%	438,969	2.2%	439,730	0.2%
Visual and Performin...	411,107		416,424	1.3%	423,171	1.6%	428,377	1.2%	431,037	0.6%	414,890	-3.7%
Social Sciences	438,703		424,438	-3.3%	405,257	-4.5%	395,536	-2.4%	397,563	0.5%	404,003	1.6%
Multi/Interdisciplinary ...	258,746		262,160	1.3%	262,976	0.3%	271,603	3.3%	272,123	0.2%	267,828	-1.6%
Communication, Jour...	309,734		284,760	-8.1%	276,337	-3.0%	273,049	-1.2%	273,148	0.0%	264,548	-3.1%
Security and Protecti...	272,480		253,671	-6.9%	242,648	-4.3%	233,865	-3.6%	237,971	1.8%	241,439	1.5%
Parks, Recreation, Le...	235,916		231,614	-1.8%	234,831	1.4%	234,927	0.0%	237,084	0.9%	235,224	-0.8%
Public Administration ...	130,134		124,320	-4.5%	116,171	-6.6%	113,652	-2.2%	120,789	6.3%	127,118	5.2%
Physical Sciences	133,282		125,793	-5.6%	120,281	-4.4%	119,244	-0.9%	123,482	3.6%	124,656	1.0%
Agriculture, Agricultur...	97,023		96,481	-0.6%	98,610	2.2%	101,000	2.4%	104,821	3.8%	105,727	0.9%
English Language an...	122,456		115,138	-6.0%	113,454	-1.5%	109,596	-3.4%	107,379	-2.0%	98,789	-8.0%
Engineering Technol...	86,555		86,754	0.2%	86,270	-0.6%	87,369	1.3%	91,691	4.9%	94,530	3.1%
Mathematics and Stat...	96,662		92,864	-3.9%	86,190	-7.2%	83,802	-2.8%	85,982	2.6%	84,358	-1.9%

Select Award and Institution Level Combination
Fig. 6.1-6.2

- ☒ Undergraduate 4-Year
☐ Undergraduate PAB
☐ Undergraduate 2-Year
☐ Graduate

What A Difference 6 Years Makes



Whiplash As Companies Flip from Retraining to Layoffs

2019

WSJ **Amazon to Retrain a Third of Its U.S. Workforce**



Accenture says it retrained 300K workers in 4 years



"Amazon's promise to upgrade the skills of its workforce... represents one of the largest corporate retraining initiatives on record."

2025

WSJ **Amazon Is on the Cusp of Using More Robots Than Humans in Its Warehouses**

Bloomberg **Accenture to Double AI Workforce Three Months After Mass Layoffs**



41%

of employers would downsize their workforce due to AI



International Market Volatility

HEADWIND

3

Show of Hands...

How confident do you feel in your institution's ability to grow graduate enrollment considering expected international enrollment declines?

- Not confident at all
- Not confident
- Neutral (neither confident nor unconfident)
- Confident
- Very Confident



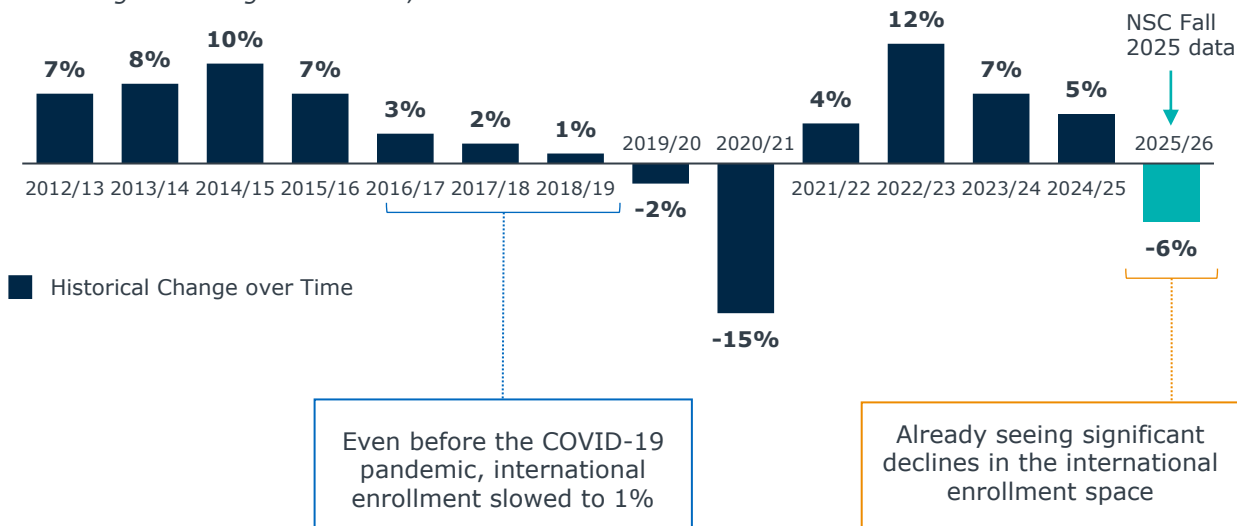
The Uncertain Future of International Enrollment



Shifting Policies Demand New Recruitment Strategies

International Enrollment Trends at US Universities

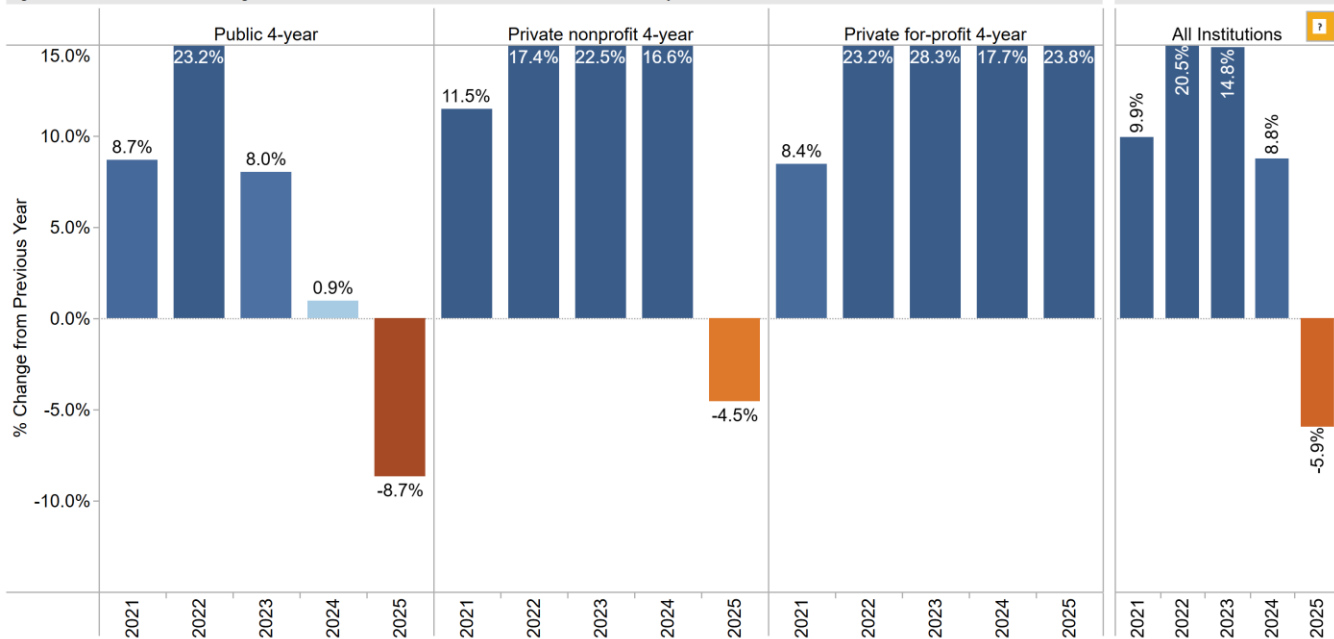
Percentage of Change Over Time, 2012-2025



Fall 2026 International Student Enrollment



Figure 2.1 Annual Percent Change in Fall Graduate Enrollment for International Students by Sector



Source: National Student Clearinghouse, Jan. 15, 2026; 'Current Term Enrollment Estimates – Fall 2026'

New International Graduate Student Enrollment Declines



OPEN DOORS INTERNATIONAL STUDENTS DATA

New International Student Enrollment

opendoors®

FROM THE 2025 OPEN DOORS® REPORT

Academic Level	% Change from previous year	Years							
		2024/25	2023/24	2022/23	2021/22	2020/21	2019/20	2018/19	2017/18
Undergraduate	5.3	98,963	93,978	95,681	90,642	69,183	104,907	106,881	108,539
Graduate	-14.5	150,536	176,084	168,920	146,526	66,082	120,332	119,828	117,960
Non-Degree	-3.6	27,619	28,643	33,922	24,793	10,263	42,473	42,674	45,239
Total	-7.2	277,118	298,705	298,523	261,961	145,528	267,712	269,383	271,738



Revenue Constraints

HEADWIND

4

A Declining Financial Outlook for the Sector



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Moody's



- Overall negative outlook
- Recently downgraded from stable outlook due to federal policy changes

S&P Global



- Overall bifurcated outlook
- Negative outlook for highly regional, less selective schools lacking financial flexibility

Fitch



- Overall deteriorating outlook
- Enrollment issues, tight margins, legislative uncertainty will erode budget flexibility

Positive Outlook

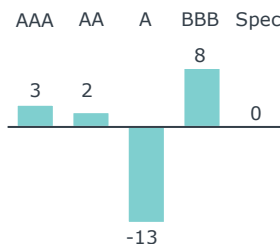
The Growing Credit Quality Divide

Negative Outlook

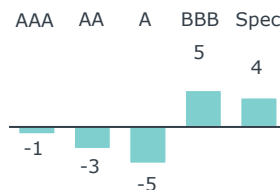
Hollowing Out of the Middle

Percentage Point Change, 2015-2024

Publics



Privates



- **4%** of ratings have positive outlooks¹
- More positive outlook revisions and upgrades have occurred at higher end of ratings scale

- **12%** of ratings have negative outlooks¹
- **3:1** unfavorable to favorable revisions
- Most downgrades in 2025 will be at lower end of ratings scale

¹) As of 11/30/24.

Federal Policies Threaten All Major University Revenue Sources

Undergraduate Tuition

- Reduce the max Pell Grant award
- Eliminate certain aid programs for low-income students
- Restrict lifetime borrowing for Parent PLUS loans
- Place earnings accountability on Title IV eligibility
- Expand Workforce Pell

Graduate Tuition

- Cap federal loan limits for graduate/professional programs
- Eliminate Grad PLUS loan programs
- Tighten graduate program accreditation requirements
- Place an earnings test on loan access for programs

International Students

- Tighten visa screening and vetting
- Introduce a one-strike “catch and revoke” policy
- Re-introduce travel bans
- Propose a change to visas with fixed-term lengths

Research Funding

- Cancel grants related to DEI
- Cap indirect cost recovery
- Reduce funding for science agencies
- Expand foreign gift reporting requirement

Philanthropy

- Increase endowment taxes
- Threaten non-profit status
- Restrict foreign gifts
- Enforce anti-boycott legislation affecting investments

Federal Loan Changes Threaten the Status Quo



One Big Beautiful Bill Act of 2025 Rapidly Changes Graduate Financial Aid Landscape



Current Loan Programs In Place Through July 1

- **Direct Loans:** Up to \$20,500/yr available, up to \$138K total
- **GradPLUS:** Covers up to the remaining cost of attendance, loan terms include credit review and higher interest rates
- **Students enrolled** before July 1 will be grandfathered in and retain these program benefits, with some adjustments



Changes Limit Extent of Federal Borrowing Options

- **Eliminates Grad PLUS loans** for new borrowers effective July 1, 2026
- Limits total borrowing to **\$100,000 for graduate degrees** and **\$200,000 for professional degrees**
- **Professional degree designation is narrowly limited²** to MD/DO, PharmD, Chiropractic, Optometry, Dentistry, Veterinary Medicine, JD, Clinical/Applied/Counseling Psychology PhD programs, and Ministerial/Theological degrees
 - What is **NOT included:** programs such as MBA, NP, PT/OT, MSW, and Education Master/Doctoral Programs

²https://www.nasfaa.org/news-item/37622/Consensus_Reached_RISE_Committee_Supports_Entire_Package_of_OBBBA_Provisions

4 Headwinds for the Future of Grad Enrollment



Demographic Decline

Population decline, coupled with growing non-consumption among audiences who *could* enroll, will make it more difficult to find and enroll students



Crisis of Confidence

Concerns about higher ed's value further undermines future enrollment potential



International Market Shuffle

Policy changes will further inhibit enrollment from once large prospective student pools in China, India, and more



Shifting Revenue

Declining international enrollment and limits to graduate financial aid will increase the need to effectively leverage aid dollars



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Our Latest Survey Research

Decoding the Graduate and Adult Student Mindset

Key Insights from Our Survey of 8,000+ Students—And What They Mean for Your Enrollment Strategy

Adult Learner Recruitment

EAB's Annual Survey of Graduate and Adult Learners

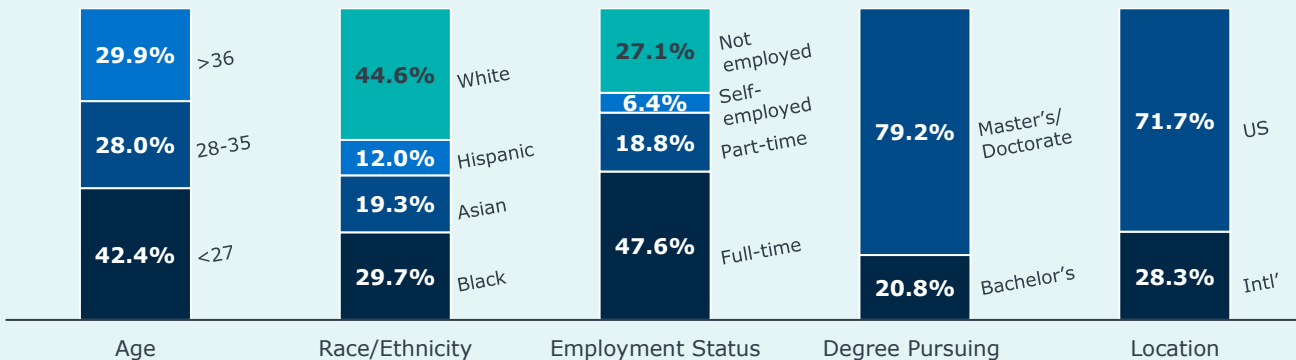
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Survey Collection



- Data collected **August-September 2025**
- **8,106** participants, including current and prospective graduate, online, and adult learners

Participant Profile



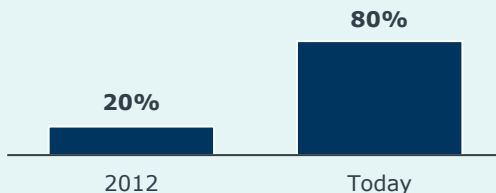
Additional cuts of survey data available upon request.

Majority of Applicants Fly “Under the Radar”

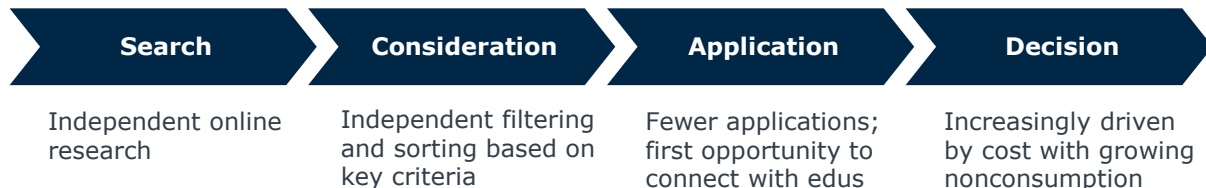


Stealth Shopping Rates* Reach Record Levels

Stealth as Percentage of Total Applicants



How Mega-Stealth Shopping Manifests Throughout Recruitment Funnel

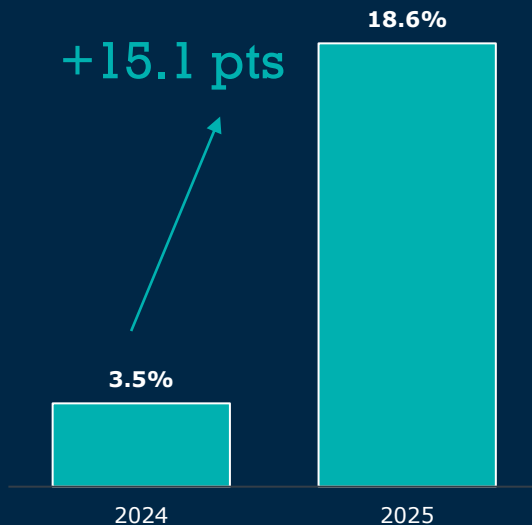


*Based on research interviews conducted by EAB of partner institutions offering Professional, continuing, and online education .

AI Usage Surges 5X in 12 Months

“What sources of information have you used in your search?”

Respondents that selected “AI-powered search/chatbots (e.g., ChatGPT, Gemini, Perplexity)”



ROADMAP

1

Today's Students Are
More Efficient in Their
College Search

2

Digital-First Resources
Fuel the Search Process

3

Cost Is the Ultimate
Gatekeeper

4

Limited Program Options
Drive Format and Modality
Mismatch



Today's Students Are More Efficient in Their College Search

And More Stealth Than Ever

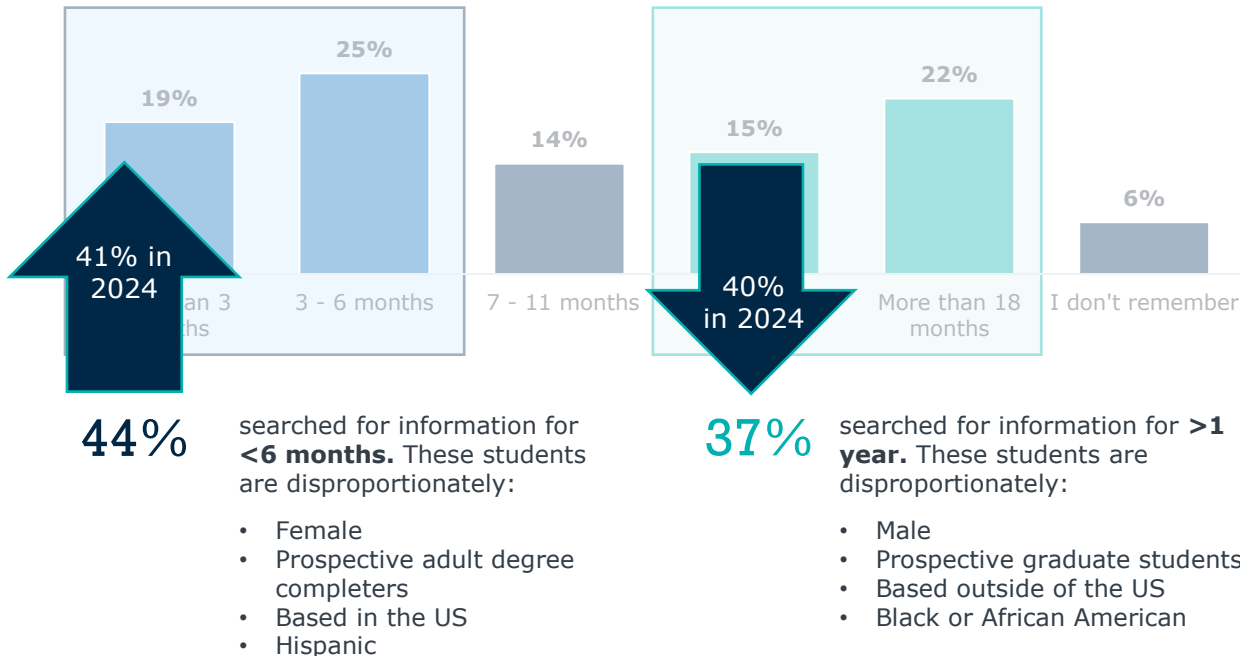
1

Students' Decision Timelines Have Accelerated



Quick AI Answers Likely Contributing to More Efficient Decision Making

"How long have you been actively searching for information about furthering your education?"

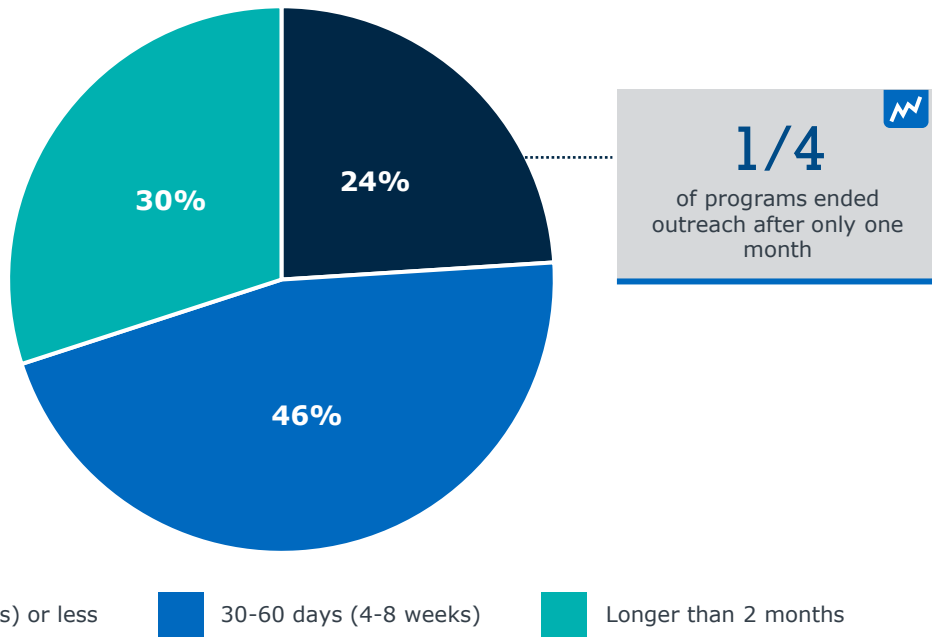




Most Programs' Campaigns End Too Soon

A Study of 50 Edu Nurturing Campaigns Shows Room for Improvement

Duration of Lead Nurture Campaign



Live Poll:



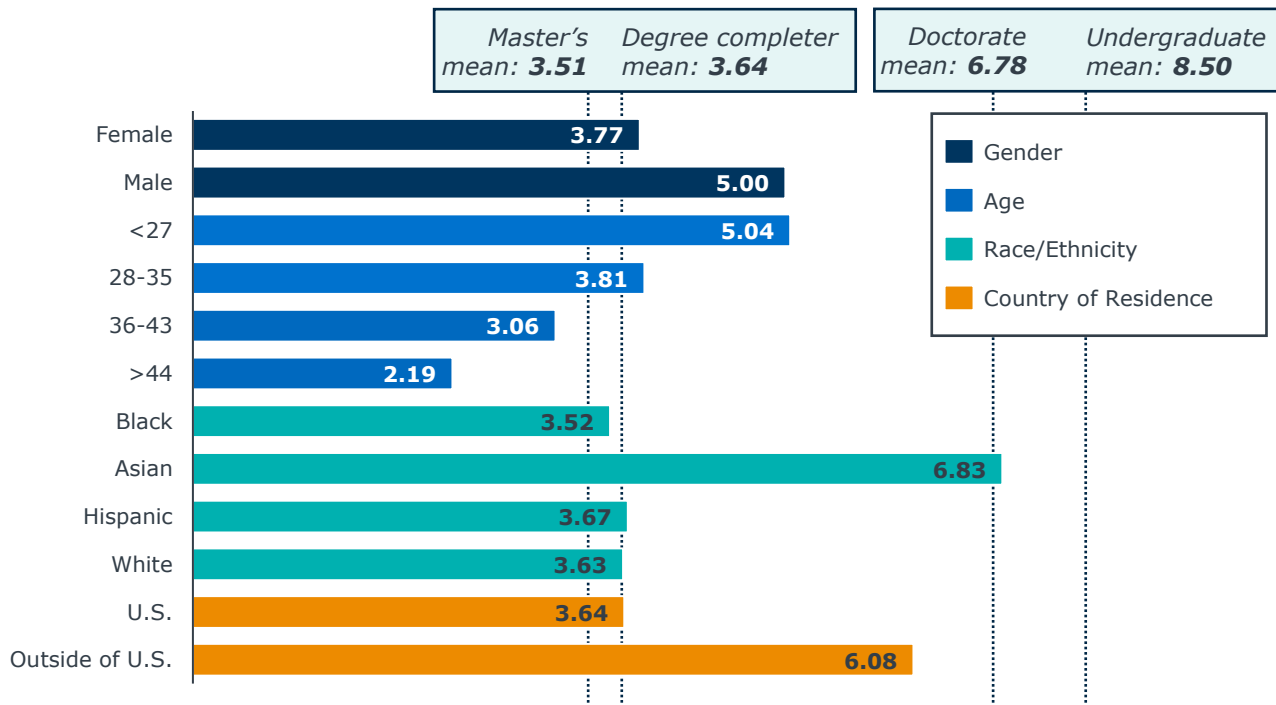
Do you know how long your nurture campaigns last?



Efficiency Gains at the Application Stage

Masters and Degree Completers Apply to Fewer Edus

Variation in Mean Number of Applications Across Demographics





Digital-First Resources Fuel the Search Process

Search Now Redefined by AI

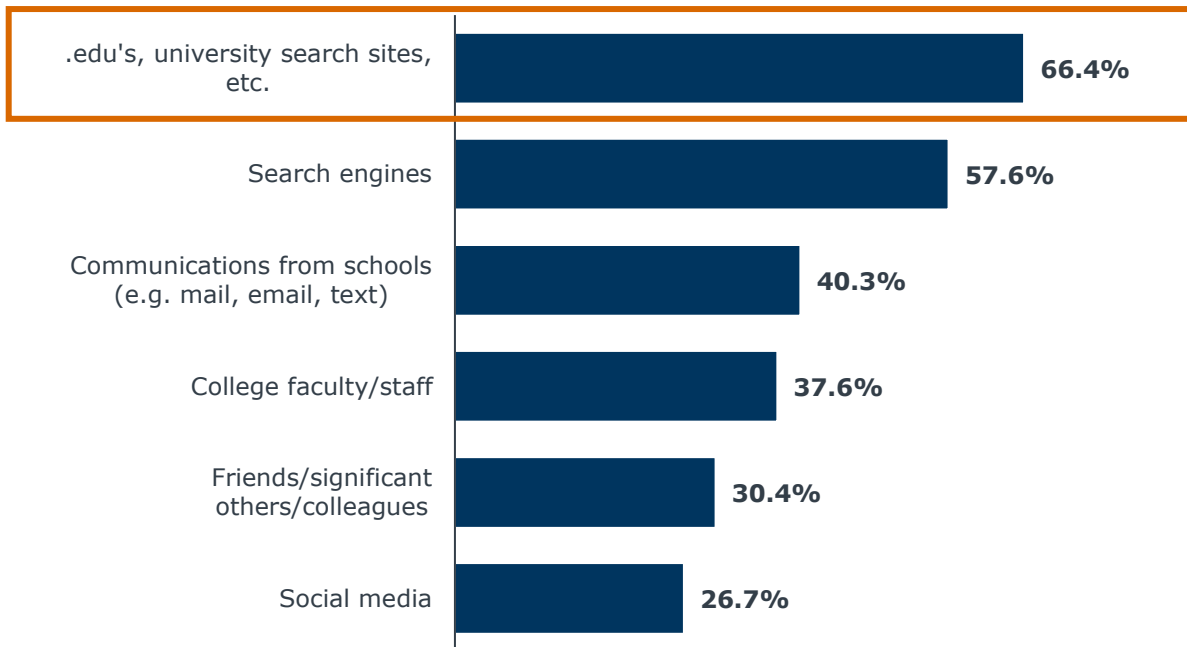
2

Organic Channels Dominate Discovery Phase



“What sources of information [did you use/have you used] in your search?”

Respondents could select all that apply; top six answers shown



Your .Edu Is Critical to Students' Decision-Making



52

Reminder: .Edu's Are the Top Search Source for Adult Learners



93.6% Make a point of visiting websites of all the schools they are considering



90.0% A user-friendly website will improve my opinion of a school



86.4% A school's website helps me decide whether the school is right for me
 *Up from 77.9% in 2023*



84.0% A poorly functioning website will negatively affect my opinion of a school



45.6% I primarily visit school websites on my mobile device

Rate Your Website



On a scale from 1-5, how confident do you feel about your website?



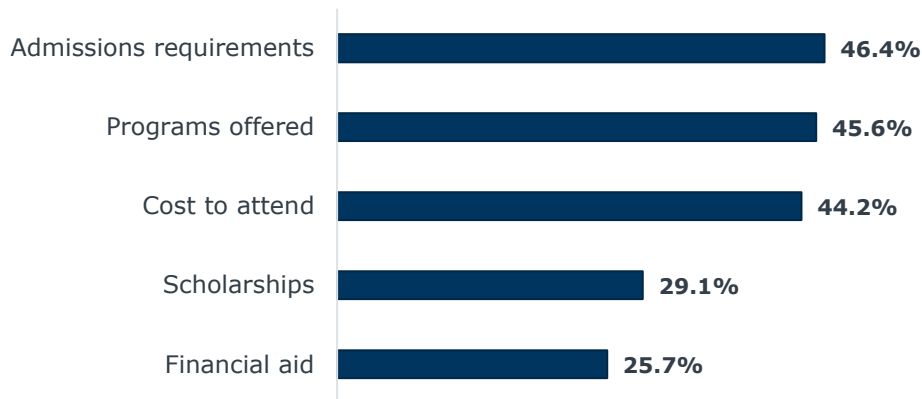
Prominently Address Student Needs on Website



54

“When you searched specific schools’ websites, what information were you most often trying to find?”

Respondents could select three options; top five responses shown



Can Students Easily Find the Information They Need to Make Enrollment Decisions?

Our team of web content strategy experts can help identify areas to optimize your program pages and other enrollment-critical pages on your .edu

A Brief Exercise: How Do Your Program Pages Stack Up?

90s

Average time prospects spend
on a university webpage

Scavenger Hunt

Is language clear and written for a lay audience?	Is the program tuition readily available? (without calculating credits x fees/credit?)	Are merit aid, scholarships, etc. listed?	Are the application requirements and deadline listed?
Is there contact info for a real person?	Is there information on transfer credit options?	Is format (online, in-person, hybrid) listed?	Is program duration quickly accessible?
Is the program start date listed?	Are career outcomes featured?	Are there photos of real students?	Is there an application link or button?
Are there student or alumni testimonials elevating impact?	Are program differentiators listed?	Does the page show labor market data for the field?	Is the page mobile-friendly?

Rate Your Website



Has your rating changed after completing the exercise?

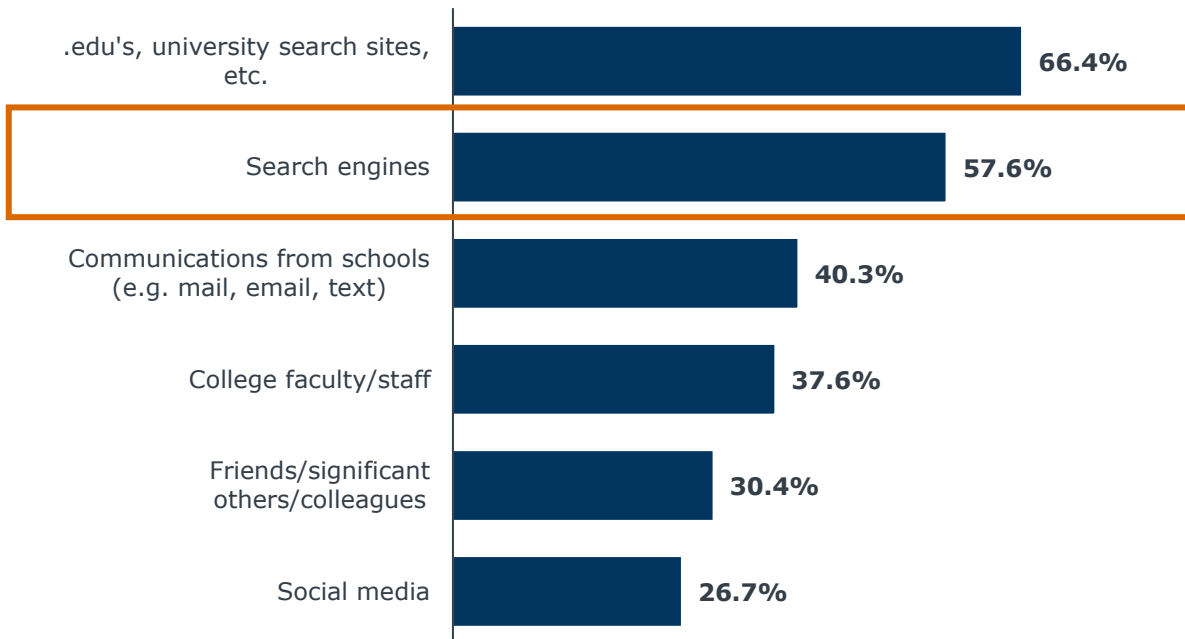


Organic Channels Dominate Discovery Phase



“What sources of information [did you use/have you used] in your search?”

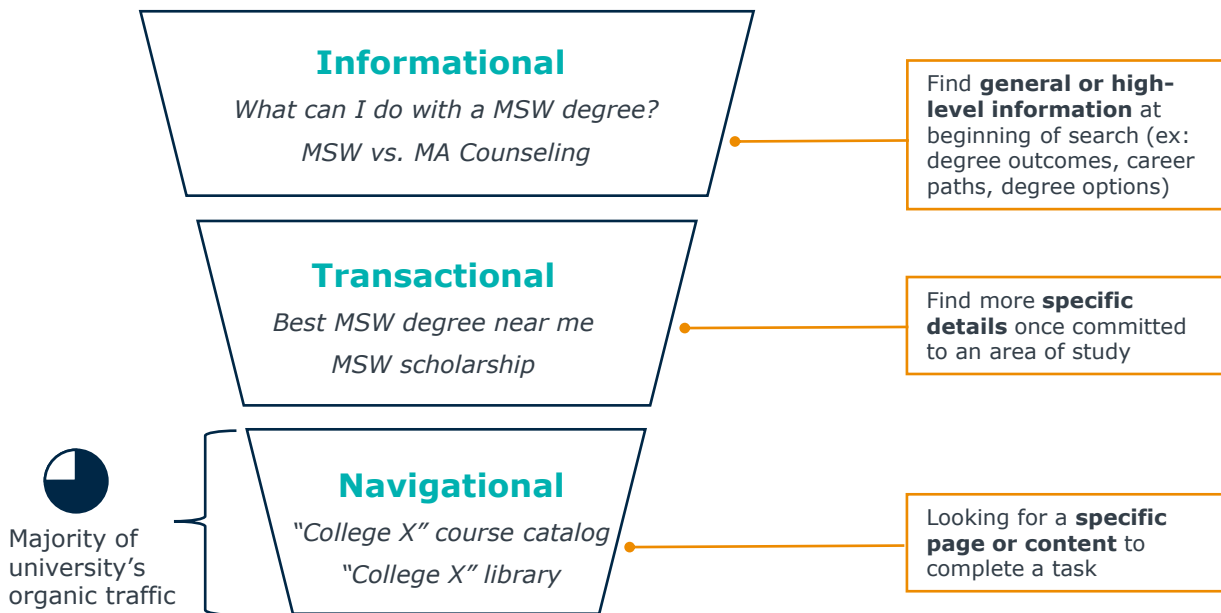
Respondents could select all that apply; top six answers shown



Support Students' Searches with Relevant Content



Ensure Program Pages Address Search Intent Higher In The Funnel



Support Students' Searches with Relevant Content



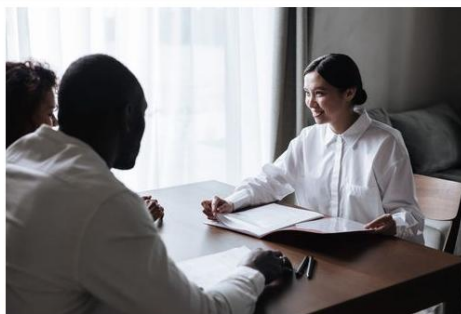
Ensure Program Pages Address Search Intent Higher In The Funnel

COLUMBIA | SCHOOL OF SOCIAL WORK

[Home](#)[Program Pathways](#)[Specializations](#)[Practicum Education](#)[Curriculum](#)[Admission](#)[Faculty](#)[About](#)

What Can You Do With a Master's in Social Work?

Social workers bring their skills to a variety of settings, including hospitals, nonprofits, government offices, and the private sector, with each role making important contributions. While social workers are in fact the **largest group of mental health services providers** in the U.S. — outnumbering psychiatrists, psychologists, and psychiatric nurses combined — the skills earned in a **master of science in social work (MSW) program** can support anyone who wants to effect positive change via their job, whether that is through social worker careers or in other professional areas.



Defining Social Work: An Expanded Understanding

The **National Association of Social Workers (NASW)** defines social workers as professionals who “assist people by helping them cope with issues in their everyday lives, deal with their relationships, and solve personal and family problems.”

The Impact of AI on Search Results

1

Paid and organic listings bumped down

2

Organic traffic declining in a “click-free” environment

3

Cost-per-click up due to fewer high visibility ad placements

4

New opportunities to land on SERP

The screenshot shows a Google search for "what can i do with a mba". The results are divided into several sections:

- AI Overview panel:** A new section at the top right, highlighted with a red box and a callout. It contains a summary of career options for MBA graduates, including management consulting, human resources management, and business intelligence. It also mentions the University of Minnesota Online and the University of North Dakota.
- Sponsored:** A section below the AI Overview panel, highlighted with a red box and a callout. It contains two paid search ads:
 - Fox School Of Business - MBA While Working Full Time:** An ad from fox.temple.edu offering an MBA program that allows students to work full-time while studying.
 - West Virginia University:** An ad from westvirginia.edu offering a program that allows students to work full-time while studying.
- Organic listings:** A section below the sponsored ads, highlighted with a red box and a callout. It contains organic search results, including a link to "What Jobs Can I Get With an MBA? 10 High-Paying Options." from a source dated May 10, 2023.
- People also ask:** A section at the bottom of the page, highlighted with a red box and a callout. It contains a list of related questions, such as "What kind of jobs does an MBA get you?", "Is getting an MBA worth it?", "Which MBA paid the highest salary?", and "Will an MBA increase my salary?".



Cost Is the Ultimate Gatekeeper

Once That Hurdle Is Cleared, Quality Signals Shape Student Choice

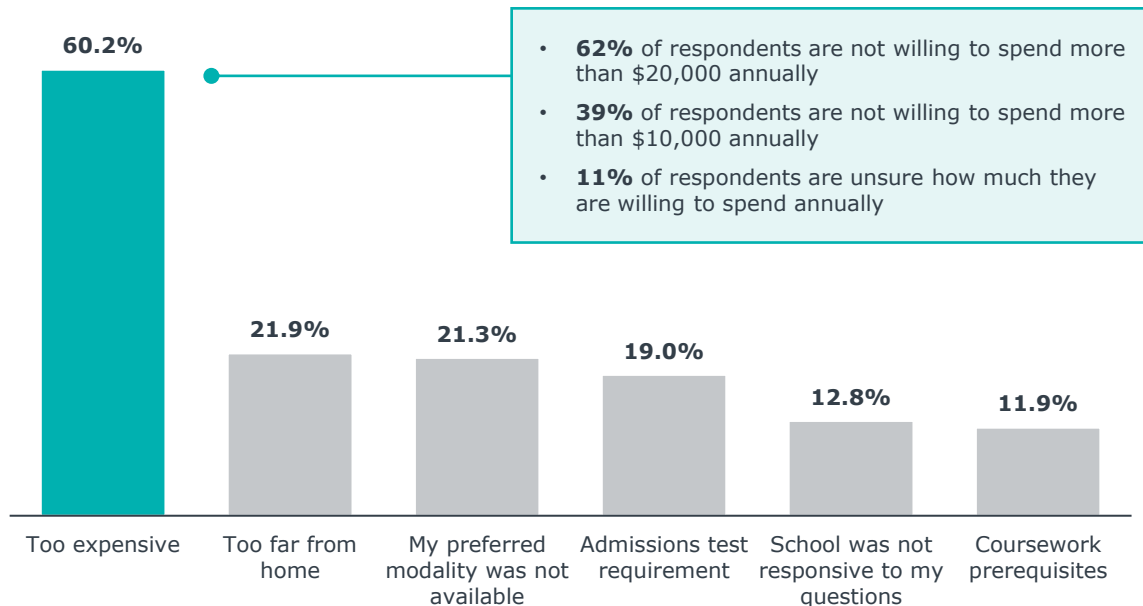
3

Consideration Stage: Cost is the Gatekeeper



"Select any reason that caused you to *remove a school from your consideration set.*"

Asked of participants currently, planning to enroll, or planning to enroll, but not within the next two years; responses >10%

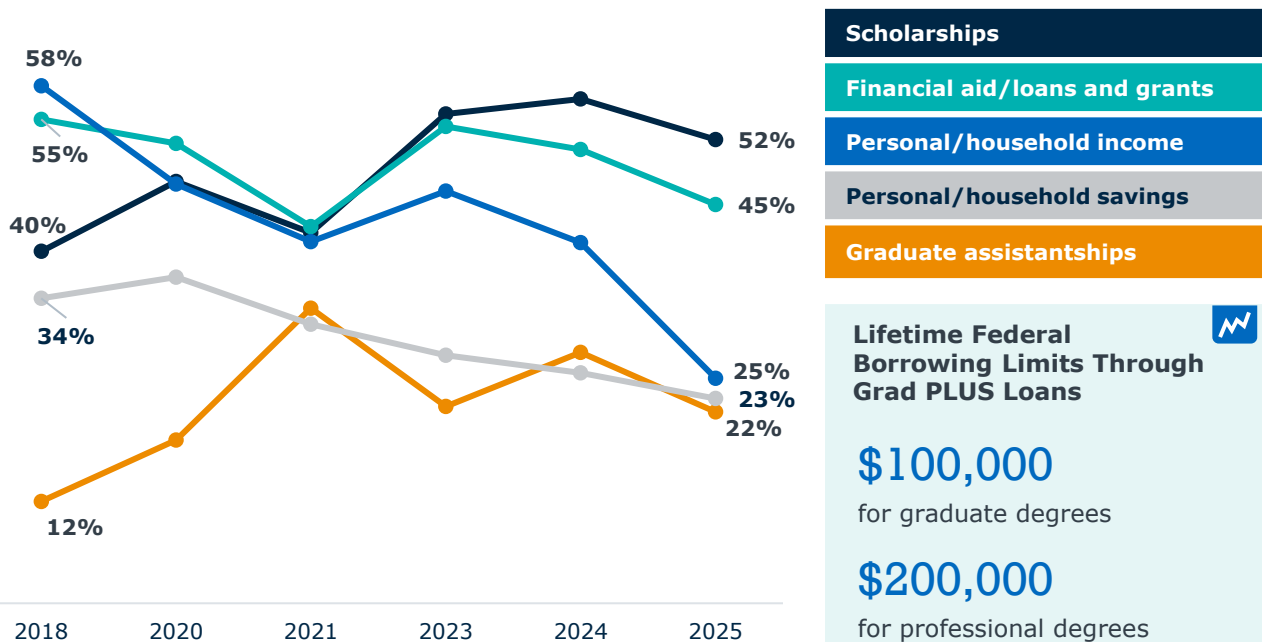


Students Increasingly Rely on Outside Funding

But Federal Loan Changes Threaten the Status Quo

"What sources of financial support will you have for continuing your education?"

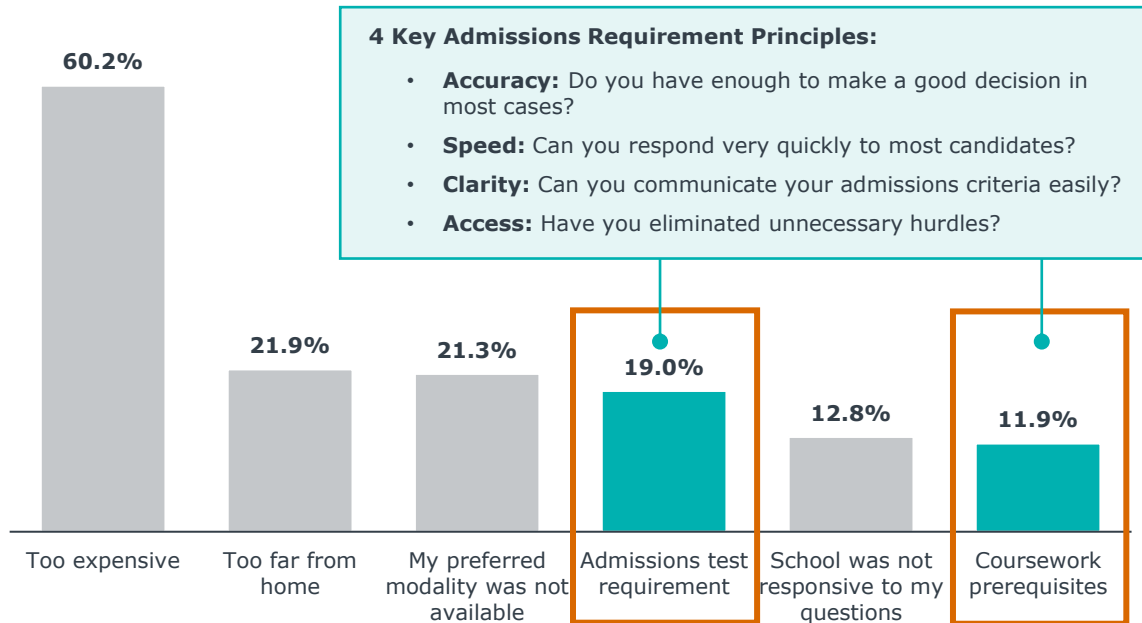
Select all that apply; top five responses shown



Many Students Not Applying Due to Requirements

"Select any reason that caused you to *remove a school from your consideration set.*"

Asked of participants currently, planning to enroll, or planning to enroll, but not within the next two years; responses >10%





Limited Program Options Drive Format and Modality Mismatch

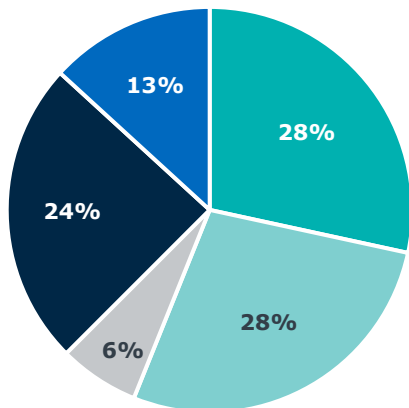
4

Adults Prefer Hybrid But Enroll Differently

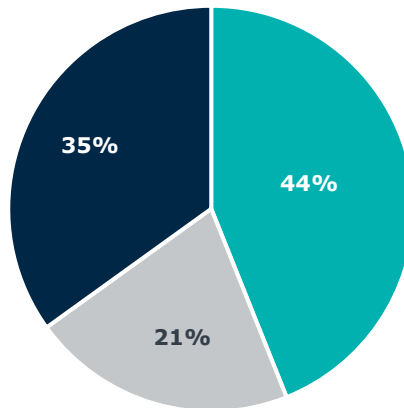


67

PREFERENCE



REALITY

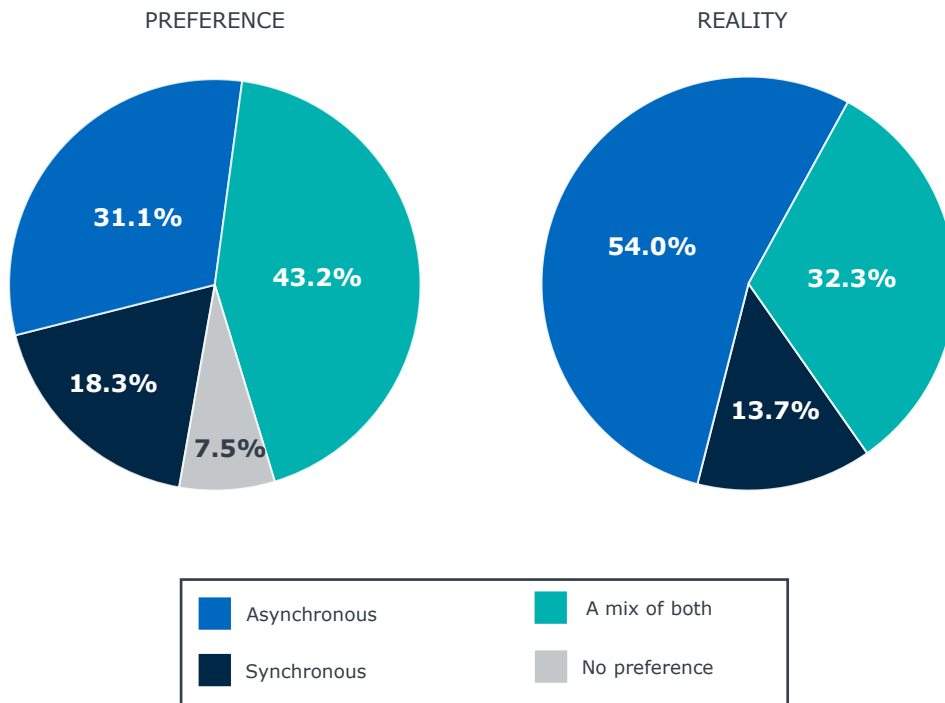


- All in-person classes
- All online classes
- A majority of in-person classes
- A majority of online classes
- No preference

- In-person
- Online
- Hybrid

Source: EAB 2024 Adult Learner Survey

Online Learners Enroll In Asynchronous Classes



Source: EAB 2024 Adult Learner Survey

In Their Own Words

"Why did you enroll in a course format different from your preferred format?"

- ▶ "There were no options possible in my program that matched my preference."
- ▶ "This is the only format offered by the University for this degree."
- ▶ "Online majority wasn't an option so I decided to compromise."
- ▶ "It is the only way it is offered."
- ▶ "My preferred format is hybrid learning. There just wasn't an option for this."
- ▶ "No other option...it's the only way the program was offered."

4 Key Takeaways



Today's Students Are More Efficient in Their Search

Ensure your marketing campaigns are reaching students across channels and are using hyper-personalization to strike the right tone, speak to their concerns, and adjust based on their behavior and intent.



Digital-First Resources Fuel the Search Process

With AI at their fingertips, your website must be optimized for AI and traditional search and must clearly display critical decision-making criteria to ensure that your website is an enrollment driver.



Cost Is the Ultimate Gatekeeper to Enrollment

With the elimination of grad PLUS loans and a growing reliance on outside funding, adult learners will rely on you for financial support and guidance, making your financial aid strategy more important than ever.



Limited Options Drive Format and Modality Mismatches

Hybrid schedules are the preferred modality for 41% of surveyed students. When designing programs, identify your core audience and where possible, use their preferences to inform your program design.





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EAB

Differentiating Your Graduate and Adult-Serving Programs In a Competitive Market

Adult Learner Recruitment



The Case for Competitive
Differentiation



A Framework for
Differentiation



Differentiation
Exercise



The Case for Competitive Differentiation

SECTION

1

Success Requires Standing Out



1

Growing Competition

- Program growth has outpaced conferrals in the past decade
- New non-academic providers have entered the market

3

Maxed Out Mindshare

- Average adult is exposed to 4-10K brands per day
- Prospects spend only 90 seconds on a .edu webpage, on average

2

App Lists Are Short

- Students apply to few schools:
 - 3.5 avg applications for graduate students
 - 3.6 avg applications for degree completers

4

Independent Research

80% of applicants are stealth and rely on program information found across digital channels to learn more before ever engaging with your institution directly



To what extent do you agree with the following statements?

- ▶ Our university has a value proposition that is truly differentiated
- ▶ Our graduate programs are truly differentiated in the market



Who Does This Describe?



A Variety of Graduate Degree Programs

At the University of X, we have dozens of graduate programs across a variety of disciplines so you can design a course of study that aligns with your interests and career objectives.



Flexible, Customizable Options

At UX, our degrees are offered online or in a hybrid format to meet your busy schedule. Many of our degrees offer a variety of concentrations so you can customize your degree for a specialization or industry.



Career Advancement

Gain a competitive edge in your career by pursuing your master's degree at UX. You'll leave with in-demand skills preparing you for leadership positions in a wide array of agencies, organizations and corporations.



Academic Excellence

Unlock your potential in our top-ranked programs helmed by distinguished and dedicated faculty who will help you grow your expertise, access unique research opportunities, and gain real-world experience.



Affordability

Your future is within reach at UX. We are committed to helping you achieve your educational goals with our affordable tuition and merit-based scholarships.



Does this sound like your institution?



Many Claims Are Commonplace or Unrelatable



Twin Pillars of Traditional Branding Don't Help You Stand Out

Appealing, but Assumed

Online **Specializations**
Flexible **In-demand skills**
Global
50+ Degrees
ROI **Innovative**
Career Impact **Affordable**
Academic Excellence
Alumni Network

Distinctive, but Unconnected to Audience

Traditions and Accolades

- "Largest research university in a metropolitan setting"
- "Oldest liberal arts college in the Plains States"
- "First accounting program in New England"

Signature Initiatives

- *Experiential Learning*
- *Interdisciplinary Research Center*
- *Holistic Wellness Curriculum*
- *State-of-the-Art Innovation Labs*

"Sounds like everyone else"

"How does this help me?"

Traditional Competitors

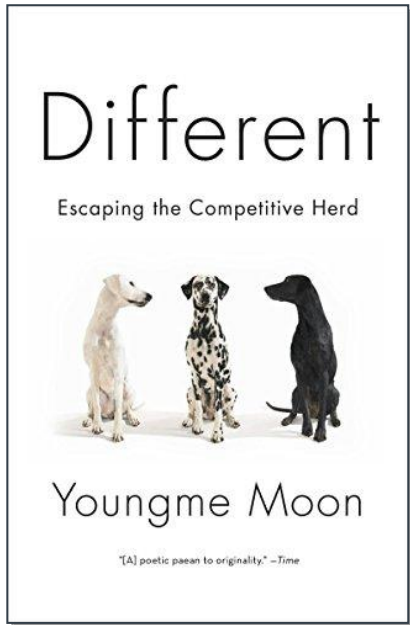
Online Mega-Institutions

Employer Pathways

Non-Consumption



Lessons from the World of Consumer Marketing



- 1 **Augmentation-by-addition** ("New and Improved!") and **augmentation-by-multiplication** ("32 Flavors!") are making consumers numb to choices
- 2 In many mature markets, **the differences between products become imperceptible to all but true connoisseurs**, reducing most choices to a simple formula (cheapest, most popular, etc.)
- 3 **When asked what they want, consumers mostly point to our weaknesses**—driving businesses to become more like their competitors instead of focusing on strengths
- 4 **What results is "Herd Mentality" within product categories**—businesses racing to keep up with each other and arriving at the same place despite no actual coordination

"Differentiation is not a competitive strategy.
It is a means of avoiding competition altogether."

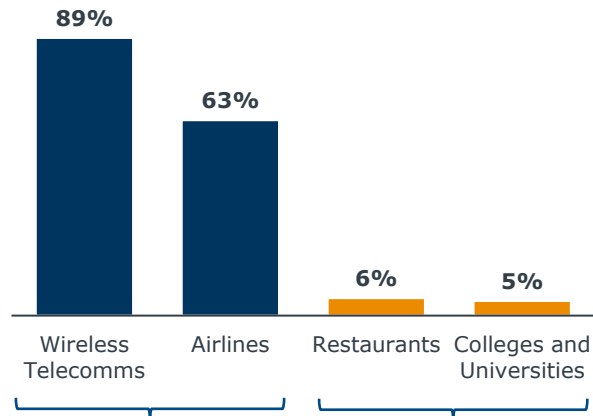
What Is Your Special Sauce?

81

Insights from the Restaurant Industry Apply to Higher Ed

Higher Ed is a Competitive Market

Market Share of Top 4 Competitors by Industry (Revenue)



Oligopolies

- National competition
- Large competitors dominate market
- Little room for new entrants

Competitive Markets

- Regional and national competition
- Room for new entrants
- Still competition from market leaders

Regional Players Can Carve out Share

Regional Player

Market Leader



Regional Players

- Strong regional brand affinity
- Large online and on-ground presence
- Low cost or elite brand

Market Leaders

- National marketing reach
- Massive online scale
- Low cost



A Framework for Differentiation

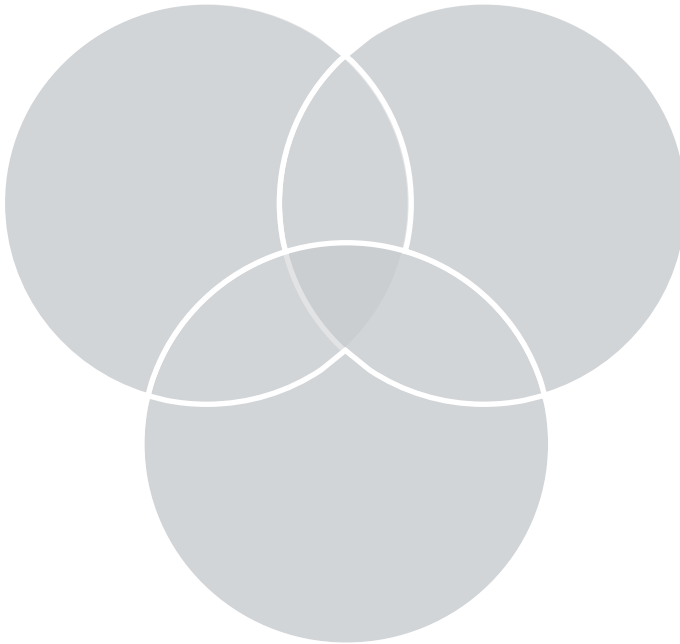
SECTION

2

Focusing on Your Differentiation Sweet Spot



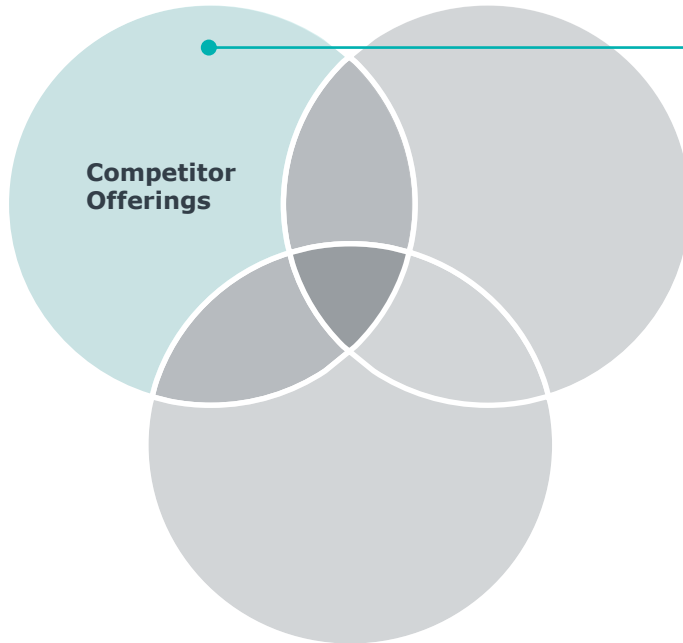
Industry Context: *Demographics, technology, regulation*



Focusing on Your Differentiation Sweet Spot



Industry Context: *Demographics, technology, regulation*



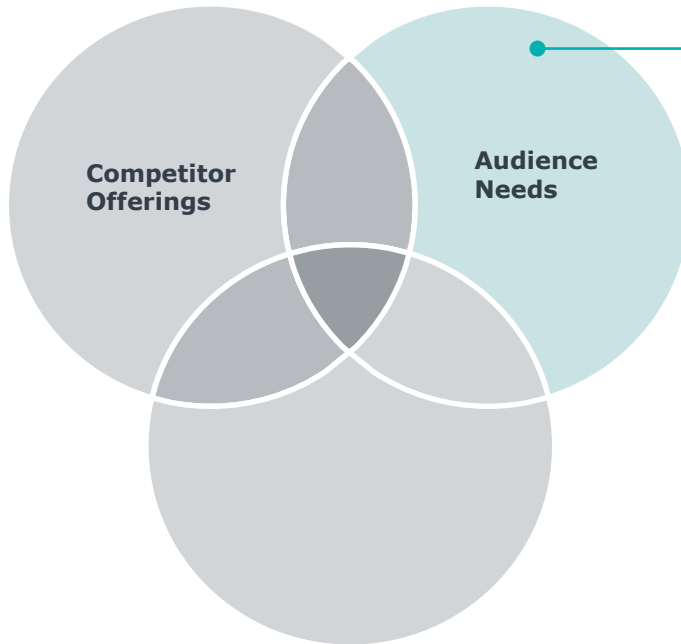
Competitors (by Program)

- Who are we competing with?
- When they 'win,' why?
- When you 'win,' why?
- What does this say about your reputation and value proposition(s) in your regional competitive set?

Focusing on Your Differentiation Sweet Spot



Industry Context: *Demographics, technology, regulation*



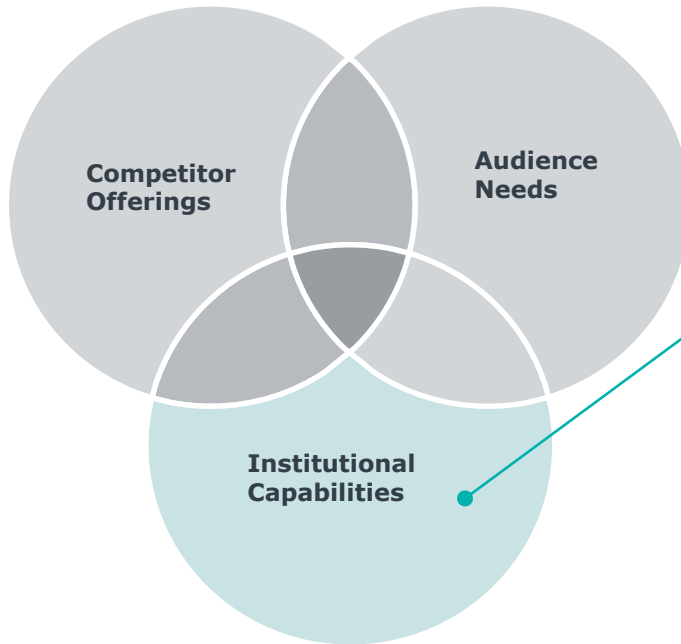
Target Audience (by Program)

- Who are our “right fit” students? How has the answer to that changed, and how will it continue to change?
- For whom are we NOT the best fit? Why?
- What’s changing about what prospective students value?

Focusing on Your Differentiation Sweet Spot



Industry Context: *Demographics, technology, regulation*



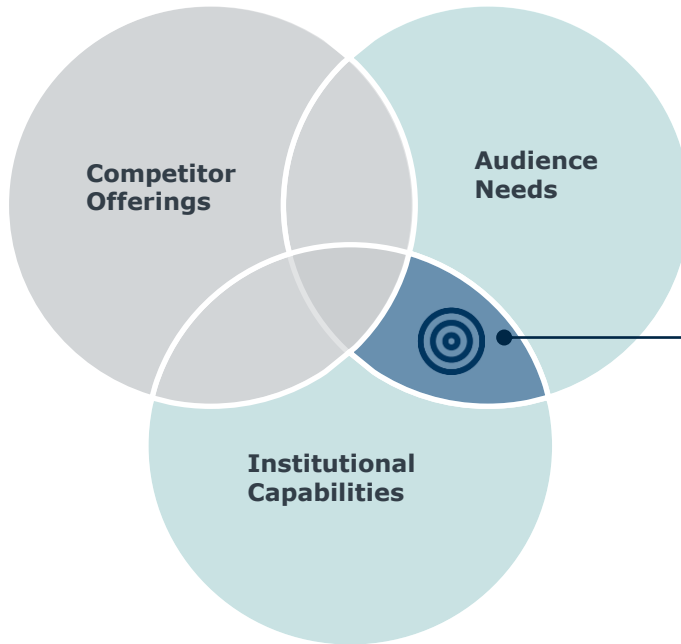
Your Capabilities (by Program)

- Academics
- Values
- Location
- Pricing
- Partner Networks

Focusing on Your Differentiation Sweet Spot



Industry Context: *Demographics, technology, regulation*



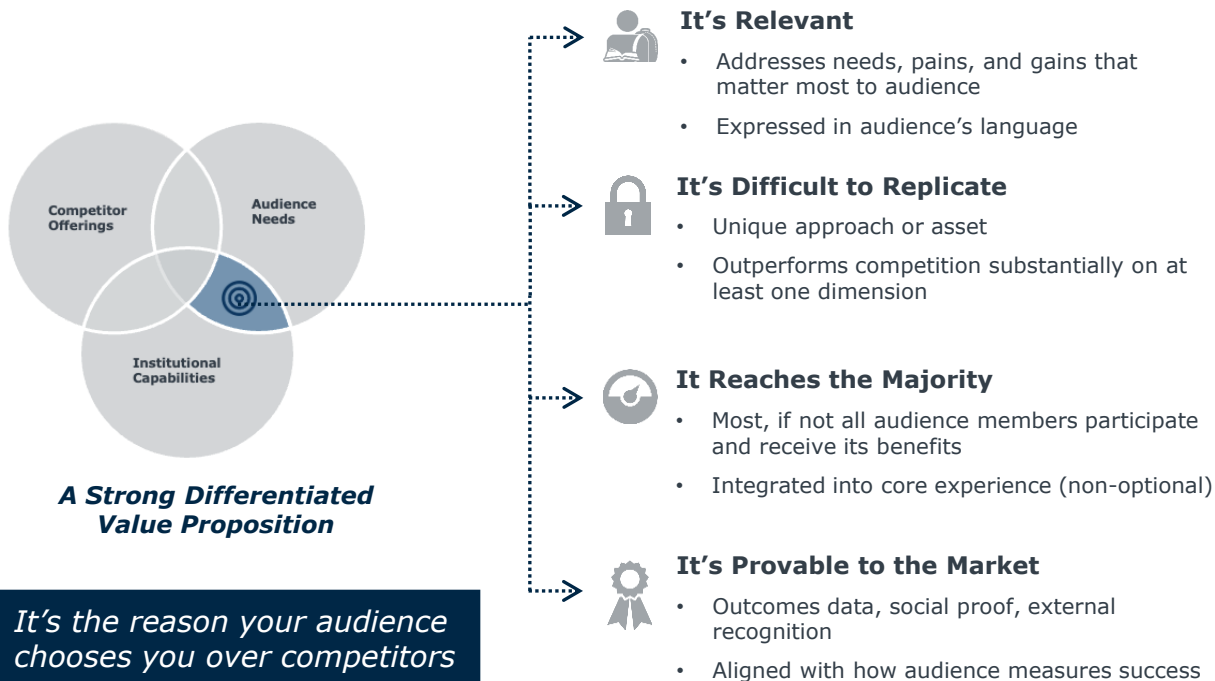
Differentiation Sweet Spot

Where your institution meets audience needs in ways competitors can't

Evolving Common Claims to Distinct Value Drivers

88

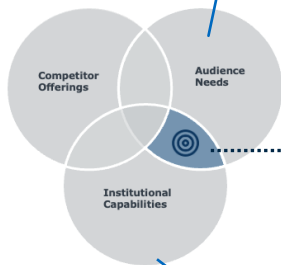
Stress-Test Claims Against These Four Criteria



Distinct Value Drivers in Action

- ✖ **Common Claim:** *Our Masters in Global Policy prepares students to impact the global community through an academically rigorous interdisciplinary program.*

Early career students worried about breaking into field without a network.



Our Global Policy program centers on global network development from day 1:

- Orientation co-led with NGO partners
- Six campuses and dozens of partner organizations worldwide



It's Relevant

- Program centered on global networking using language relevant to students.



It's Difficult to Replicate

- Dozens of partner organizations and six global campuses.



It Reaches the Majority

- Orientation and fieldwork and integrated into core experience with 100% of students participating.



It's Provable to the Market

- Alumni and student profiles on website
- 50% of students get offers after fieldwork

Differentiation “Starter Kit”



70+ Potential Value Drivers

"Our MBAs Develop Real-World Skills Valued by Industry"

Distinctive Academics

Program Variety
Program Quality
Unique Programs
Stackable Credentials
Flexible Delivery
Short Time to Completion
Flexible Scheduling
Pedagogical Method
Class Size

Student Outcomes

Employment
Earnings
In-demand Skills
Industries
Portfolio

Partner Networks

Alumni
Community
Employers
Industries
Global
Research

Staff Characteristics

Credentials
Background
Teaching Experience
Industry Experience
Technical Expertise
Availability

Special Services for Target Students

Working Adults
Adults New to Online Learning
Adult Degree Completers
International
Special Needs
Military

Service Quality Levels

Personalized Service
One-Stop Service
Concierge Service
Peer-to-Peer Service

Student Experience

Global Experience
Small Cohort
Student Organizations
Real-world Projects
Research/Lab Facilities

Shared Values

Sustainability
Faith-based
Social Justice
Community Service
Wellness
Outdoor Life
Innovation

Distinctive Location

Proximity
Beauty and Climate
Cultural Attractions
Recreation Options
Regional Economy

Distinctive Student Services

Advising
Mental Health
Career Services
Financial Aid Support
Technology

Pricing

Low Net Price
Low Price Relative to Competitors
Payment Options
Need-Based Aid
Merit Aid

Brand Character

Exclusivity
Quality
Higher Purpose
Value for Money
Lifestyle
Disruptive



Compounding Amplifies Distinction

Real-world Projects

Students build an online portfolio in each class



Industry Experience

Industry expert liaison assigned to each course



Alumni Network

Our graduates lead dozens of Inc. 5000 companies

Distinctive Academics

Program Variety
Program Quality
Unique Programs
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Disruptive



Compounding Amplifies Distinction

Community Service

All students in community leadership training



Global

International field placement with NGO



Mental Health

Daily mindfulness and meditation programming

Distinctive Academics

Program Variety
Program Quality
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Bringing Your Differentiators to Life

Slides available in follow-up to help bring this content back to your team

SECTION

3

At Your Seats...

Exercise: Discuss with Peers

Grade Your Value Drivers



Relevance to Audience

How will you improve your goal?

When can you realistically achieve your goal?

What resources or investments are needed?



Share of Audience Enjoying Benefits

How will you improve your goal?

When can you realistically achieve your goal?

What resources or investments are needed?

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Exercise: Independent Brainstorming

Value Driver Imperatives



Relevance to Audience



Share of Audience

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Quality
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Value for Money
Lifestyle
Disruptive

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Bringing This Work to Life



Identify one graduate program



Identify Competitors' Claims

Use our ChatGPT-ready prompt to accelerate this process

ChatGPT ▾

Compare the 3 largest xxxxx programs within a 60-mile radius of xxxxx based on IPEDS conferral volume, identifying each program's stated target audience, unique value proposition or claims and tuition.

Cancel

Send

Use this prompt now:



Identify Competitors' Claims

Use College Navigator to Identify Your Key Competitors:
nces.ed.gov/collegenavigator



National Center for
Education Statistics

What we do ▼

Use our work ▼

Explore funding ▼

Learn with us ▼

About us

COLLEGE Navigator

English [Español](#) [About](#)

Name of School
 Type name of school here

States (use map for more than 1 state)
☐ No Preference
☐ Alabama
☐ Alaska
☐ Use Map

ZIP Code **Miles from**

Programs/Majors
 0 Items Selected [Browse for Programs](#)

Level of Award [?](#)
☐ Certificate ☐ Associate's
☐ Bachelor's ☐ Advanced

Institution Type [?](#)
☐ Public ☐ 4-year
☐ Private non-profit ☐ 2-year
☐ Private for-profit ☐ < 2-year

MORE SEARCH OPTIONS

[Show Results](#)

[Guide Me](#) [Clear Search](#)



- » **Refine your search** with *More Search Options* to select additional search criteria.
- » **Build a list of schools** using *My Favorites* for **side-by-side comparisons**.
- » **Pinpoint school locations** with an *interactive map*.
- » **Export search results** into a *spreadsheet*.
- » **Save your session** including search options and favorites.
- » **Add College Navigator** to your browser search bar.

College Affordability and Transparency Center



Browse lists of institutions with the highest and lowest tuition & fees and net price, and lists of institutions not meeting the 90/10 revenue requirement. [» GO](#)

ADDITIONAL RESOURCES

Preparing for your Education

Find out what you need to do to prepare for education beyond high school. [» GO](#)

Financial Aid

Apply for Federal Student Aid on FAFSA. [» GO](#)

Postsecondary Education Outcome Measures: ED, DOD, and VA ED, DOD, and VA have identified a set of potential education outcome measures for Veterans and service members. [» GO](#)

Careers

Deciding on a career? Consult the *bls.gov* Occupational Outlook Handbook. [» GO](#)

Want to speak to an EAB expert about finding your competitors?

Using the Differentiation “Starter Kit”

70+ Potential Value Drivers

Distinctive Academics

Program Variety
Program Quality
Unique Programs
Stackable Credentials
Flexible Delivery
Short Time to Completion
Flexible Scheduling
Pedagogical Method
Class Size

Student Outcomes

Employment
Earnings
In-demand Skills
Industries
Portfolio

Partner Networks

Alumni
Community
Employers
Industries
Global
Research

Staff Characteristics

Credentials
Background
Teaching Experience
Industry Experience
Technical Expertise
Availability

Special Services for Target Students

Working Adults
Adults New to Online Learning
Adult Degree Completers
International
Special Needs
Military

Service Quality Levels

Personalized Service
One-Stop Service
Concierge Service
Peer-to-Peer Service

Student Experience

Global Experience
Small Cohort
Student Organizations
Real-world Projects
Research/Lab Facilities

Shared Values

Sustainability
Faith-based
Social Justice
Community Service
Wellness
Outdoor Life
Innovation

Distinctive Location

Proximity
Beauty and Climate
Cultural Attractions
Recreation Options
Regional Economy

Distinctive Student Services

Advising
Mental Health
Career Services
Financial Aid Support
Technology

Pricing

Low Net Price
Low Price Relative to Competitors
Payment Options
Need-Based Aid
Merit Aid

Brand Character

Exclusivity
Quality
Higher Purpose
Value for Money
Lifestyle
Disruptive

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Student Outcomes

Employment
Earnings
In-demand Skills
Industry Connections
Portfolio

Partner Networks

Alumni
Community
Employers
Government
Global
Research

Staff Characteristics

Credentials
Background
Teaching Experience
Industry Experience
Technical Expertise
Availability

**What are your top competitors claiming?
Cross those off the list.**

Special Services for Target Students

Working Adults
Adults New to Online Learning
Adult Degree Completion
International
Special Needs
Military



Service Quality Levels

Personalized Service
One-Stop Service
Concierge Service
Peer Support

Student Experience

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Research/Lab Facilities

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Community Service
Wellness
Outdoor Life
Innovation

Highlight 1-2 remaining items that you can claim

Distinctive Location

Proximity
Beauty and Climate
Cultural Attractions
Recreation Options
Regional Economy

Distinctive Student Services

Advising
Mental Health
Career Services
Financial Aid Support
Technology

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Program Quality
Unique Programs
Stackable Credentials
~~Flexible Delivery~~
Short Time to Completion
Flexible Scheduling
Pedagogical Method
Class Size

Student Outcomes

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~~Earnings~~
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Industries
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Community Employers
Industries
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Ensure Each Claim Meets Value Driver Imperatives



Relevance to Audience



Difficulty for Competitors to Copy



Share of Audience Enjoying Benefits



Provability to the Market

Sharing This Work Back With Your Team



Common Questions and Challenges When Differentiating Your Program



How do I make this a priority at my campus when leaders think our programs are already differentiated?



Who typically leads this work?



How can we learn what matters most to our students?

LET'S DISCUSS

How would you address these questions on your campus?



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Before You Go....



Reflect On Today and Jot Down

1 Thing You **Learned** That
You Want to Remember

1 **New Strategy**, Idea, or
Behavior You Want to Try

1 **Person** You Want to Connect
with After the Meeting

Thank you!

Connect with EAB



@WeAreEAB



@EAB



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