



ADULT LEARNER RECRUITMENT

Rebuilding the Graduate and Adult Pipeline in the Age of AI

Why Visibility Alone Isn't Enough—and What to Do Instead





A New Reality for Graduate Lead Generation

SECTION

1



AI Makes Right-Fit Graduate Prospects More Invisible

The Rise of Zero-Click and Stealth Search

AI is changing how graduate and adult students search, making traditional lead generation sources such as Paid Search and organic .edu traffic less reliable. As more students use AI tools such as ChatGPT and Google AI Overviews, they increasingly get answers directly in search results instead of visiting institutional websites. This “zero-click” behavior now occurs in roughly 60% of Google searches in the United States, reducing site traffic and top-of-funnel lead volume.

[AI is also amplifying stealth shopping](#). Students can now compare programs, evaluate outcomes, and narrow their short list without opening an email or submitting an inquiry. In [EAB’s 2025 survey of 8,000 graduate and adult learners](#), 5.3 times as many students reported using ChatGPT and similar AI tools for program search in 2025 as in 2024.

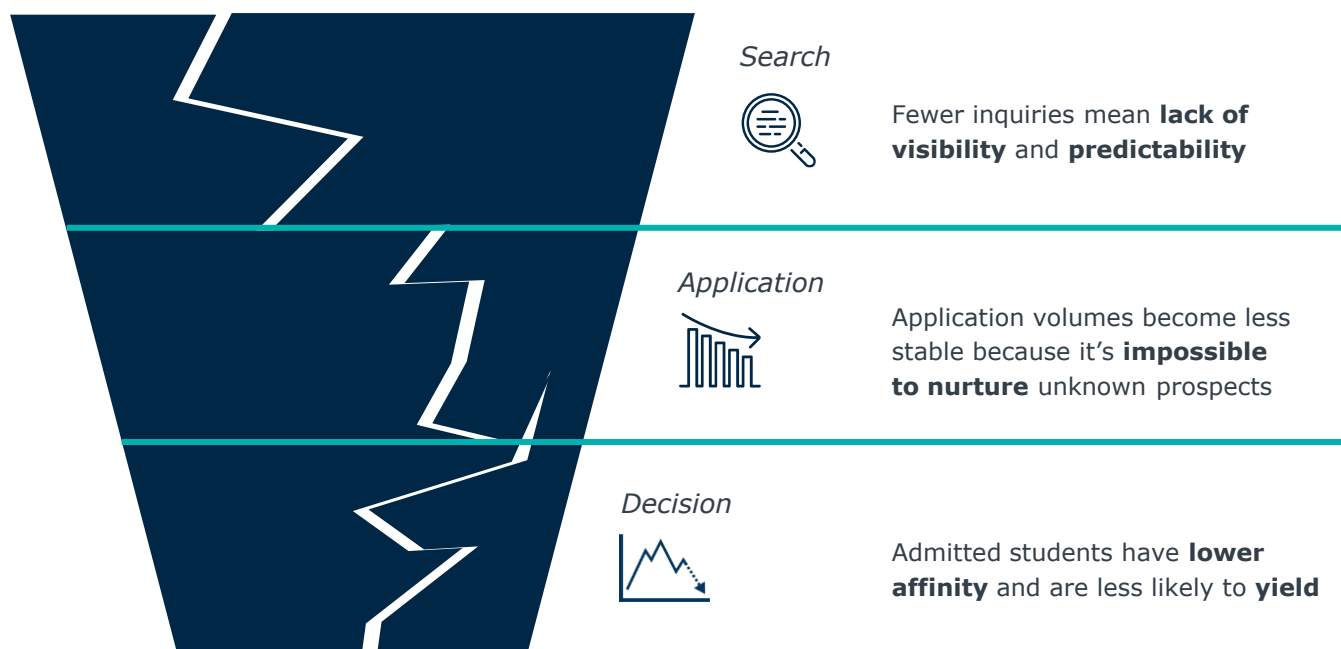
As more discovery and evaluation occur within AI-driven platforms, traditional early signals such as inquiry volume are becoming less reliable. Programs have less visibility into the funnel, making application forecasting and lead generation strategy more difficult.

This brief outlines how enrollment and marketing leaders can respond to these shifts. You’ll learn how to assess AI exposure, diversify top-of-funnel demand, and identify [AI-resilient lead sources](#) that stabilize and strengthen your pipeline.

80% of graduate and adult students research programs in stealth mode

5.3X as many students used ChatGPT and similar tools for program search in 2025 as in 2024

The Full-Funnel Toll of Stealth Shopping



Sources: EAB 2025 Adult Learner Survey; <https://sparktoro.com/blog/2024-zero-click-search-study-for-every-1000-us-google-searches-only-374-clicks-go-to-the-open-web-in-the-eu-its-360/>; EAB research and analysis.

Grad Demand Is Shrinking—and Competition Is Rising

Competition Is Intensifying for the Same Domestic Students

AI disruption is accelerating just as [international enrollments decline](#) sharply. Interest in studying in the United States has dropped 40%, and new international graduate enrollment fell 17% in 2025. Demand for advanced degrees has declined in the past few years as well, with average annual growth projected at 1.3% through 2032—compared to 3.2% across the past decade. Despite these market realities, many institutions have not adjusted their growth goals.

This volatility is changing—and shrinking—the pool of prospects. Selective institutions and national online providers are placing greater emphasis on targeting domestic graduate students to offset international losses. As a result, many institutions now compete with a broader set of institutions beyond traditional peers.

Graduate enrollment leaders face a compounded challenge: (1) intensified competition for hard-to-reach domestic prospects and (2) reduced visibility into demand due to AI-driven stealth search. To protect enrollment, leaders must understand how their competitor set is shifting and where this creates gaps in demand. Leaders must also identify [high-intent lead sources](#) that can sustain the top of the funnel despite AI or market disruption.



-10%–15%

Nationwide decline in traditional-aged students by the early 2030s



1/3

of 18-to-24-year-olds are not enrolling in college



40%

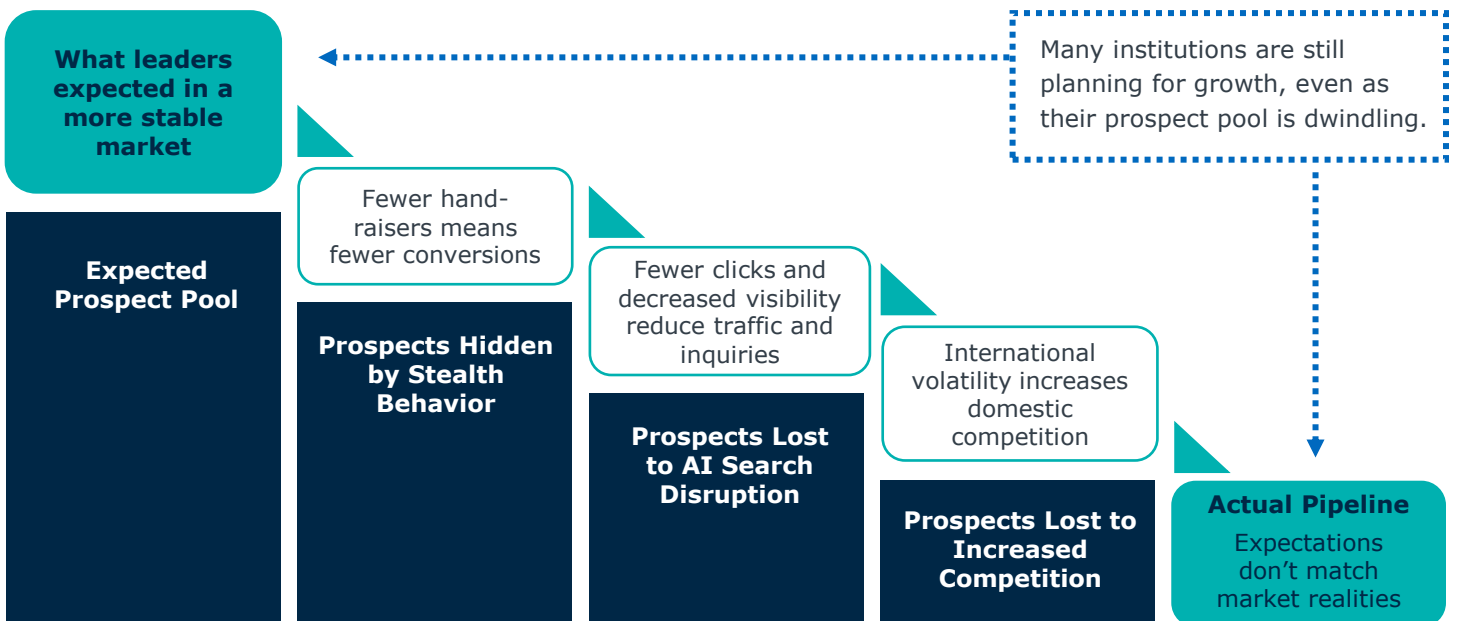
Decline in interest in studying in the U.S.



17%

Decline in new international enrollment in Fall 2025

Market and AI Disruptions Compound Top-of-Funnel Losses



Sources: EAB Blueprint for Growth analysis; National Student Clearinghouse; "Global Burdens of Disease Population Projections 2019-2100," Institute for Health Metrics and Evaluation; <https://edsource.org/2025/trump-policies-impact-international-students/745207>; <https://theplenews.com/postgrad-international-student-interest-in-us-plunges-by-40/>; Western Interstate Commission for Higher Education, "Knowing at the College Door: Projections of High School Graduates," 2024; Georgetown University Center on Education and the Workforce, "Graduate Degrees: Risky and Unequal Paths to the Top."

Why Search Alone Can't Sustain Your Pipeline

AI Is Disrupting the Efficacy of Organic and Paid Lead Generation Tactics

As AI reshapes how graduate prospects search, [organic and paid lead generation are becoming harder to sustain and predict](#). Thirty-four percent of Gen Z now turns to AI chatbots for informational searches, making program visibility in answer engines such as ChatGPT, Claude, or Perplexity increasingly important. If your programs are not appearing in these environments, you're missing prospective students as they build their short list.

Traditional search engines have also adapted to AI. Google's AI Overviews already appear on more than half of searches and are projected to reach 75% by 2028. These summaries take up the most prominent space on the top of results pages, crowding out both paid and organic listings and driving declines in click-through rates, which are down as much as 60% when AI summaries are present. As fewer students click through to institutional websites, fewer convert into inquiries and your pipeline shrinks.

In EAB's 2025 Adult Learner Survey, only 6% of respondents reported clicking on Paid Search links while researching colleges, compared to 23% who said they read AI-generated summaries. At the same time, platforms such as ChatGPT are beginning to introduce ads into free accounts, extending paid competition beyond traditional search engines.

Organic and Paid Search still drive high-intent traffic, but they no longer deliver predictable lead volume with the same efficiency. Organic results remain influential, with 41% of adult learners clicking non-ad links during their search; yet cost-per-click in the education industry has risen more than 40% year over year. Meanwhile, "online giants" such as Grand Canyon or WGU are investing heavily in paid media—some spending nearly \$200 million or more annually—pushing programs with smaller ad budgets further down the page. By comparison, [marketing leaders surveyed by EAB](#) reported an average *total* marketing budget of \$4.15 million in the 2025–26 academic year.

Institutions Are Paying More to Reach Fewer Students

94%

of adult learners **do not click** on **Paid Search** links while researching colleges

42%

Average **increase in Google Ads CPC** in the education industry from 2024 to 2025

\$196M

Advertising budget of online giant, Southern New Hampshire U (2024)

Stabilizing Your Lead Pipeline

Institutions that rely on one or two primary lead sources are increasingly exposed to swings in cost, visibility, and competitive pressure. The goal is no longer just to optimize individual channels. Leaders must build a more balanced lead acquisition mix that protects against disruption. Stabilizing the graduate pipeline now requires expanding beyond click-dependent tactics and broadening how prospective students find and engage with your programs. These shifts require a more deliberate and resilient approach to lead generation.



Refine Your Lead Gen Strategy for an AI-Powered Landscape

Apply Advance, EAB's lead generation solution for graduate and adult-serving programs, gives you a second engine that isn't captive to Google's AI Overviews, delivering high-intent prospects at a lower cost and with faster engagement. To learn more, visit eab.com/apply-advance.



How to Strengthen Your Graduate Lead Pipeline in the AI Era

A Three-Step Framework

SECTION

2



Strengthen Your Pipeline to Compete in the AI Era

A Three-Step Framework to Improve Search Visibility and Lead Volume

In today's AI-driven search environment, increasing high-intent graduate leads requires more than optimizing individual channels. While institutions cannot control platform shifts or market volatility, they can control how they respond. This three-step framework outlines how to protect visibility, diversify demand, and build a more resilient top-of-funnel strategy.



1 Assess Your Visibility and Lead Risk

Before rebuilding your strategy, assess where your pipeline is most exposed. Changes in how students search, where your programs appear, and how much you rely on a few lead sources can reduce visibility and make your pipeline less predictable. These shifts often appear long before application numbers decline.

Use the brief diagnostic below to [assess your AI search visibility](#), your dependence on individual lead sources, and your ability to sustain performance if conditions shift.

Diagnostic Area	Diagnostic Question	Yes	No
AI Visibility	Without searching our institution's name, do our priority graduate programs appear accurately in Google AI Overviews and major AI platforms when queried?	<input type="checkbox"/>	<input type="checkbox"/>
	Do we understand our share of voice ¹ and visibility for high-intent, non-branded search terms?	<input type="checkbox"/>	<input type="checkbox"/>
Channel Concentration	Does any single channel account for more than 50% of our total lead volume?	<input type="checkbox"/>	<input type="checkbox"/>
	If Paid Search performance declined 20% tomorrow, would we have alternative sources to sustain volume?	<input type="checkbox"/>	<input type="checkbox"/>
Reliability of Performance Indicators	Are inquiry volume and ad metrics still reliable predictors of application volume for our programs?	<input type="checkbox"/>	<input type="checkbox"/>
	Can we clearly see which channels drive leads, applications, and enrollment, not just clicks?	<input type="checkbox"/>	<input type="checkbox"/>
Capacity	Do we have the staff capacity and expertise to adapt quickly to changes in search and AI-driven discovery?	<input type="checkbox"/>	<input type="checkbox"/>

1) Share of voice is how often your institution appears in search results or AI-generated answers compared to competing schools for the same programs or topics.

Source: EAB research and analysis.

Strengthen Your Pipeline to Compete in the AI Era

2 Diversify How You Generate Leads

AI disruption and rising competition can't be addressed by simply increasing spend in familiar channels. When paid or organic performance dips, institutions that rely too heavily on a single lead source feel the impact immediately. In an environment where [most marketing budgets are flat or declining](#), leaders need to be more deliberate in how they allocate spend and diversify their lead sources.

EAB recommends that no single channel account for more than 50–60% of total lead volume. If your strategy is concentrated in one or two sources, use the five steps below to rebalance your channels, expand high-intent demand, and strengthen your lead flow.



Reduce Overreliance on Any Single Lead Source

- ▶ Ensure no single channel dominates your pipeline by setting limits and rebalancing allocation.



Protect Visibility Across Core Search Channels

- ▶ Maintain strong visibility across search by investing in SEO, Paid Search, and AI-driven discovery platforms.



Expand Demand Beyond Search Clicks

- ▶ Prioritize channels, such as [Apply Advance](#), that don't rely solely on clicks and that validate student intent earlier in their search.



Balance Student Fit Alongside Volume

- ▶ Prioritize lead sources that drive strong application and yield outcomes—not just lower cost per lead.



Measure Impact Through to Application and Yield

- ▶ Measure performance through application and enrollment outcomes, not just clicks or inquiries.

Source: EAB research and analysis.

Strengthen Your Pipeline to Compete in the AI Era

3 Track Results and Sustain Performance

Diversifying your lead mix is not a onetime adjustment. In an AI-shaped environment, where click-dependent channels are more volatile and less visible, diversification is essential to adapt to shifts in performance, cost, and competition. Sustaining top-of-funnel stability requires ongoing evaluation and deliberate optimization. Frame your lead generation strategy around three pillars: performance measurement, regular optimization, and the capacity to adapt.



Three Pillars for Sustaining Top-of-Funnel Lead Stability



1 Shift from Channel Metrics to Enrollment Outcomes

- ▶ Track lead performance through to application, admit, and yield—not just clicks, cost per lead, or inquiry volume.
- ▶ Reallocate budget based on enrollment contribution, not surface-level efficiency.



2 Review and Adjust Your Strategy Regularly

- ▶ Formalize a process for reviewing messaging, segmentation, channel mix, and timing.
- ▶ Revisit channel allocation quarterly, not annually.



3 Build the Capacity and Partnership to Adapt

- ▶ Ensure your team has the expertise and bandwidth to monitor shifts in AI search and emerging channels.
- ▶ Many institutions rely on external partners for guidance and best practices to adapt quickly.

Sustaining Performance Requires Ongoing Partnership

With [Appily Advance](#), partners receive more than just right-fit leads. You benefit from hands-on support, market-leading research, and deep expertise so that you're not navigating complexity alone.



Strategic Support



Collaborative Planning Aligned to Your Goals



Access to Experts and Events



On-Demand Insights

How EAB's Adult Learner Recruitment Can Help

Adult Learner Recruitment is a true enrollment partner for graduate, online, professional, and adult degree completion programs. Our next-generation growth strategies help you reach today's students in this dynamic market and amplify your results at every stage of the enrollment funnel.

Outperform the Market at Every Stage of the Funnel



Strategize

Identify and build market-ready programs for competitive advantage



Curate

Expand and diversify your pool of right-fit students



Cultivate

Customized campaigns to drive students to application



Convert

Improve yield and retention to maximize enrollment potential

What Makes EAB Different

40+ Years of **Higher Ed Expertise**

Unrivaled Access to New Audiences

Seamless **Marketing Orchestration**

Visibility into Full-Funnel Performance

Proven Results in a Dynamic Landscape

200+

Partner institutions

6:1

Average ROI across multiyear partnership

18%

Average graduate enrollment growth

\$2M

Average NTR influenced per partner

To discuss how EAB can help you meet your graduate and adult enrollment goals, email LexRubyHowe@eab.com. Learn more at eab.com/ALR.



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ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with more than 2,800 institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across enrollment, student success, institutional strategy, data analytics, and advancement. We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.