EAB

The State of Graduate Enrollment Management

Insights from EAB and NAGAP's Surveys of
1,200 Graduate Enrollment Leaders

Executive Overview

▶ The Graduate Market Is Rife with Opportunity—and Challenges

Despite the uncertainties of the pandemic, graduate enrollment increased at its fastest rates in nearly a decade during 2020 and 2021, outpacing industry projections. But with this opportunity also came new and evolving challenges, including:

- Increased pressure to grow graduate revenue amid accelerated declines in undergraduate enrollment
- A heightened imperative to rapidly increase diversity, equity, and access
- Staffing shortages and team burnout
- Changing student preferences and behaviors during the pandemic

Figure 1: Graduate Enrollments Grew at Fastest Rates in Nearly a Decade

Year-over-Year Growth of Total Graduate Enrollments—All Four-Year Institutions
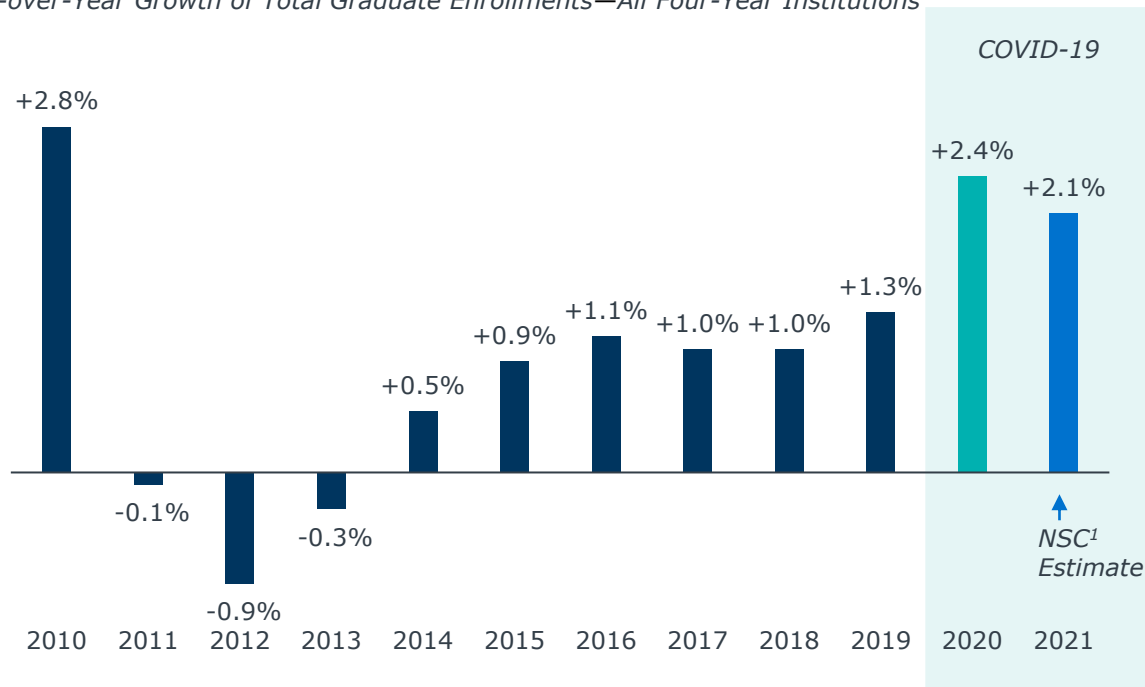
▶ Understanding Your Peers' Priorities, Concerns, and Practices

To help our partners better understand the challenges and opportunities facing graduate enrollment professionals, EAB collaborated with NAGAP to conduct eight flash surveys of approximately 1,200 graduate enrollment leaders. The following pages include findings from these surveys as well as research and insight from EAB's analysis of graduate enrollment trends before and during the pandemic.

For more information on the research methodology, please see page 19.

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Pressure Is Mounting for Graduate Enrollment Leaders

INSIGHT

1

High Stakes for Graduate Enrollment Leaders

Overall Graduate Enrollment Is Growing—at a Time When Undergrad Enrollment Is Falling Short

Prior to the pandemic, graduate enrollment was outpacing undergraduate enrollment. COVID-19 only exacerbated this trend, as depicted in Figure 2 below. Given this disparity, it is no wonder that nearly half of surveyed graduate enrollment leaders said their institutions increasingly rely on graduate enrollment to compensate for shortfalls in undergraduate enrollment.

Figure 2: Relative Growth of Graduate and Undergraduate Enrollment

Enrollment Growth at Four-Year Institutions, 2012–2021[1]

+8.3%
Increase in graduate enrollment from 2012 to 2021

+3.6%
Increase in undergraduate enrollment from 2012 to 2021
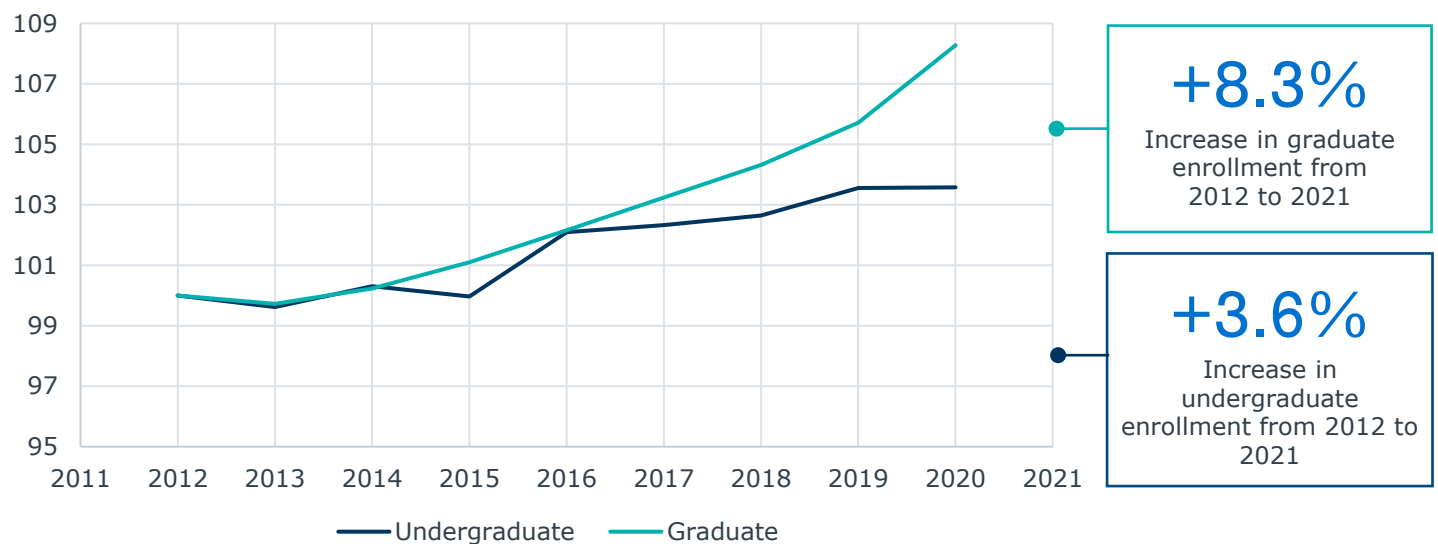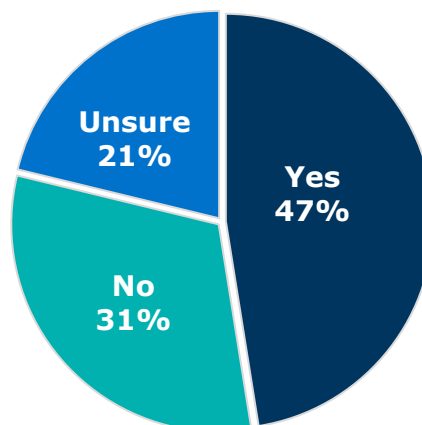
— Undergraduate   — Graduate

Figure 3: Institutions Are More Reliant On Graduate Programs to Make Up for Undergraduate Enrollment Shortfalls

Q: At your institution, has there been an enhanced reliance on graduate enrollment to make up for a shortfall in undergraduate enrollment?

Unsure 21%

Yes 47%

No 31%

Not All Institutions Experienced Graduate Growth
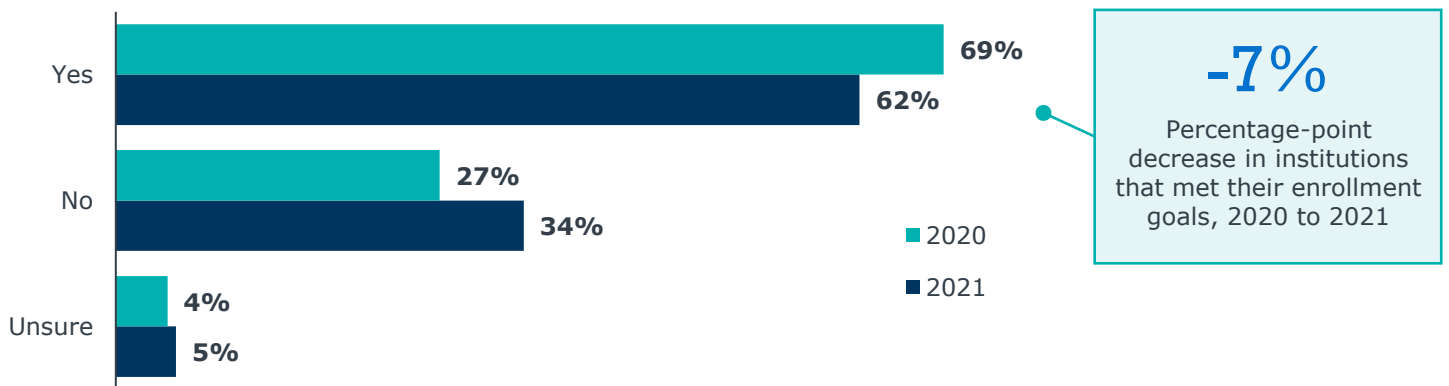
The Pandemic's Unequal Impacts on Enrollment

Although total graduate enrollment expanded during the pandemic, that growth was concentrated in a subset of institutions. Our analysis indicates that 34% of institutions experienced an enrollment *decline* of at least 2.5% from 2019 to 2020. This trend is consistent with the findings from our survey of graduate enrollment leaders. In 2020, 27% of survey respondents said they did not meet their enrollment goals, as depicted in Figure 4. This number only worsened in 2021, when 34% of survey respondents reported they did not meet their enrollment goals.

One in Three Institutions Experienced Grad Enrollment Declines
2019 to 2020

47%	19%	34%
Growing	Remain steady	Slumping
Greater than 2.5%	*-2.5% to +2.5%*	*Less than -2.5%*

Figure 4: Fewer Institutions Met Their Enrollment Goals in 2021 than in 2020

Q: Did you meet your enrollment goals?

	2020	2021
Yes	69%	62%
No	27%	34%
Unsure	4%	5%

-7%
Percentage-point decrease in institutions that met their enrollment goals, 2020 to 2021

Pre-pandemic Expertise in Online Education a Key Driver of Graduate Enrollment Growth

Through analysis of graduate enrollment trends before and during the pandemic, EAB researchers uncovered a relationship between institutional online expertise and a school's ability to grow graduate enrollment during COVID-19. Colleges and universities with a larger proportion of graduate students enrolled exclusively online in 2019 were often among the institutions that experienced the greatest growth in total graduate enrollment during the pandemic. The list below includes other factors that drove graduate growth at some institutions during COVID-19.

Top Factors Correlated with Enrollment Growth During the Pandemic
EAB analysis of IPEDS enrollment data

- ✓ Student demographic shifts
- ✓ Expertise in online education
- ✓ Institutional pandemic messaging
- ✓ New entrance requirements
- ✓ Changing labor market conditions
- ✓ Face-to-face course offerings
- ✓ Dependence on international enrollment
- ✓ Older cohort size

Source: EAB analysis of enrollment data from IPEDS Fall Enrollment Surveys 2010-2020, 'COVID-19 Stay Informed: Fall 2021,' National Student Clearinghouse, Nov. 18, 2021; EAB interviews and analysis.
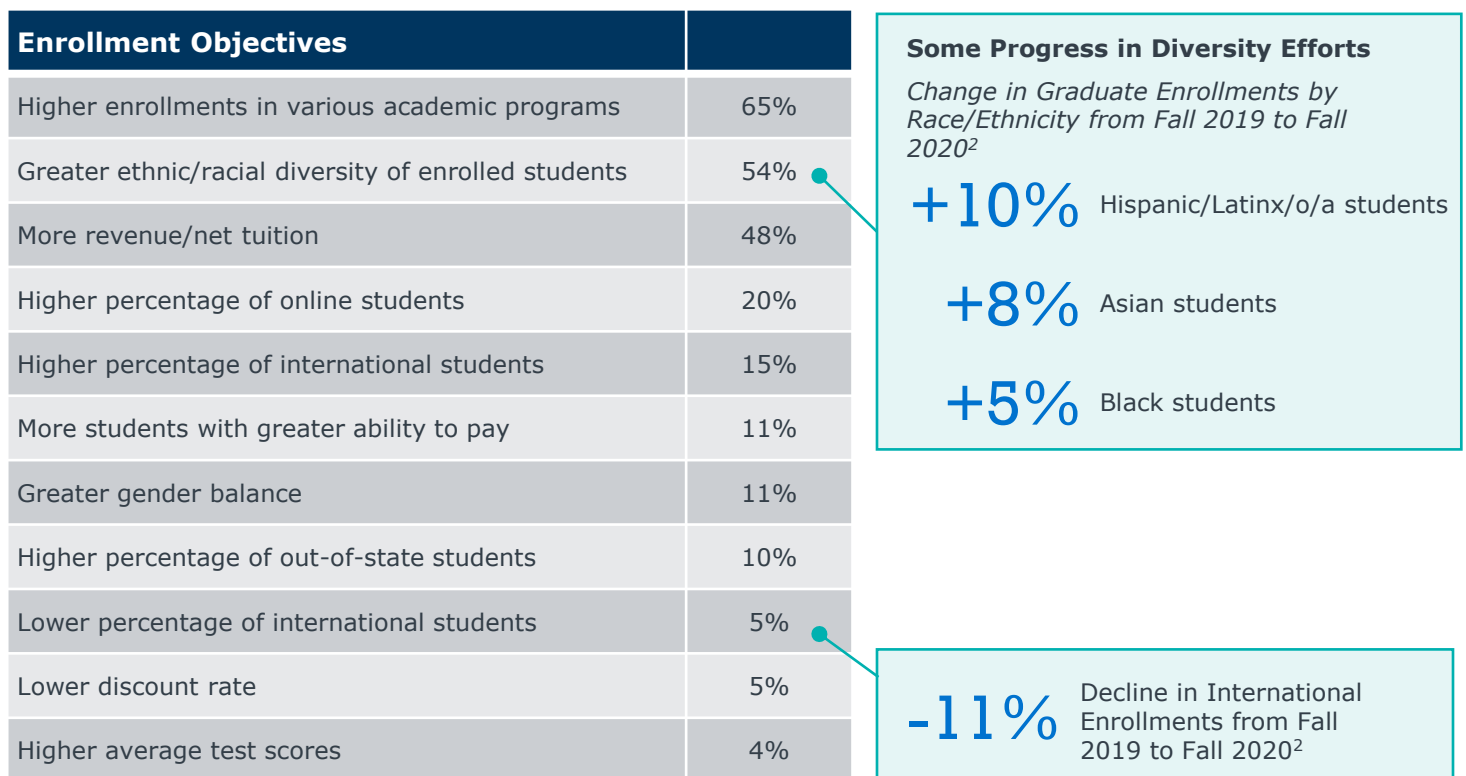
Doubling Down on Diversity, Equity, and Inclusion

Graduate Enrollment Leaders Prioritized Increasing Diversity Among Enrolled Students

In addition to increasing enrollment and revenue, survey respondents sought to expand headcount among students of color—and they largely succeeded. Enrollments from Hispanic/Latinx/o/a, Asian, and Black students grew during the pandemic. Increasing enrollments among students of color helped to offset declines in international enrollments, which lost 47,000 students from 2019 to 2020.

Figure 5: **Respondents Sought to Increase Headcount, Diversity, and Revenue**

Q: Please select up to three enrollment objectives that were a top priority for your unit this cycle (2021).

Enrollment Objectives	
Higher enrollments in various academic programs	65%
Greater ethnic/racial diversity of enrolled students	54%
More revenue/net tuition	48%
Higher percentage of online students	20%
Higher percentage of international students	15%
More students with greater ability to pay	11%
Greater gender balance	11%
Higher percentage of out-of-state students	10%
Lower percentage of international students	5%
Lower discount rate	5%
Higher average test scores	4%

Some Progress in Diversity Efforts

Change in Graduate Enrollments by Race/Ethnicity from Fall 2019 to Fall 2020[2]

+10% Hispanic/Latinx/o/a students

+8% Asian students

+5% Black students

-11% Decline in International Enrollments from Fall 2019 to Fall 2020[2]

Still Much Work to Do to Fulfill DEI Promises

More than half of surveyed enrollment leaders identified enrolling more students of color as a top priority. However, respondents said their institutions can improve in communication and execution of DEI plans:

54% of respondents said their institution's communication of its DEI commitment was only slightly or moderately effective

Only **44%** gave their institution a B+ or higher on providing a community that supports DEI efforts

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Key Takeaways

Graduate Enrollment Grew During the Pandemic, but Not All Institutions Benefited Equally

Overall growth in graduate enrollment during the pandemic far exceeded pre-COVID-19 growth projections. However, about one-third of institutions experienced graduate enrollment declines in 2020—and about one-third of surveyed enrollment leaders did not meet their enrollment goals. The institutions that grew graduate enrollment during the pandemic are more likely to have had strong online graduate portfolios before the pandemic. To grow online enrollments, consider opportunities to enhance the marketing of and students' experience in your online programs.

▶ *Resource:* For more insight on developing and marketing online programs more effectively, download this research report.

Graduate Enrollment Leaders Face Mounting Pressure to Offset Undergraduate Enrollment Shortfalls

Forty-seven percent of respondents said there is a growing dependence on revenue from graduate enrollment as undergraduate enrollment slows. Too often, however, enrollment teams lack the resources and expertise in graduate recruitment to best reach and attract graduate students. Enrollment leaders should ensure they have the proper infrastructure in place to develop the programs and marketing campaigns to appeal to prospective graduate students.

▶ *Resource:* To identify opportunities to increase leads for graduate programs, complete this self-assessment.

Attracting More Students from Underrepresented Groups Remains a Key Priority

More than half of survey respondents listed expanding enrollment among students of color as a top priority. During the pandemic, enrollment in graduate programs among Hispanic/Latinx/o/a students increased 10.2%, while enrollment among Asian and Black students grew 7.6% and 5.3%, respectively. Graduate enrollment leaders should continue to ensure lead generation tactics and marketing campaigns prioritize identifying and recruiting students from underrepresented groups.

▶ *Resource:* For research and tools to increase enrollment of and support for students of color, please visit EAB's Diversity, Equity, Inclusion, and Justice Resource Center.

Graduate Enrollment Leaders Are Placing a Growing Emphasis on Marketing

A Greater Focus on Marketing and Recruitment

Recruitment Marketing Is an Increasingly Important Piece of the Puzzle

To meet growing graduate enrollment goals, most survey respondents are amplifying marketing and recruitment efforts. Notably, more graduate enrollment leaders increased marketing efforts in 2021 (66%) than in 2020 (51%). However, fewer survey respondents met their enrollment goals in 2021 than in 2020. This suggests that expanded marketing efforts did not necessarily have the enrollment impact survey respondents desired. While the volume of marketing activity is key to strong recruitment campaigns and enrollment growth, it is critical that enrollment leaders prioritize marketing strategy rooted in data rather than sheer volume.

Figure 6: **Two-Thirds of Survey Respondents Increased Marketing Efforts in 2021**

Q: What changes did you make to your recruitment strategies this cycle?

	2020	2021
Increased marketing/recruitment efforts	51%	66%
Increased/added virtual events	81%	66%
Increased/added personalized outreach from faculty/staff	57%	48%
Changed application deadlines	40%	34%
Added/promoted a virtual tour on our website	45%	33%
Extended deposit/decision deadlines	40%	22%
Waived test scores/requirement	4%	10%
Removed application deadlines	7%	8%
Removed deposit/decision deadlines	10%	4%
Waived application fee	2%	3%
No changes	2%	5%

Although few survey respondents waived application fees, **32%** of prospective graduate students surveyed in 2021 say application fees influenced their decision *not* to apply to a specific school or program.

Costs to Compete Are Rising—Making an Effective Marketing Strategy Even More Important

An increase in marketing efforts also means graduate enrollment leaders must contend with more noise in the market—and an increase in cost per lead and other marketing expenditures. The box below includes the dollar amount several major players in online graduate education spent on advertising, marketing, and lead generation in 2020. Although outliers, the focus on marketing at these institutions reflects a growing focus on marketing across graduate schools and online education units.

Online Giants Spend Massive Sums on Marketing

Dollar Amount Spent on Advertising and Promotion, 2020

$164M
Grand Canyon University

$144M
Southern New Hampshire University

$127M
Western Governors University

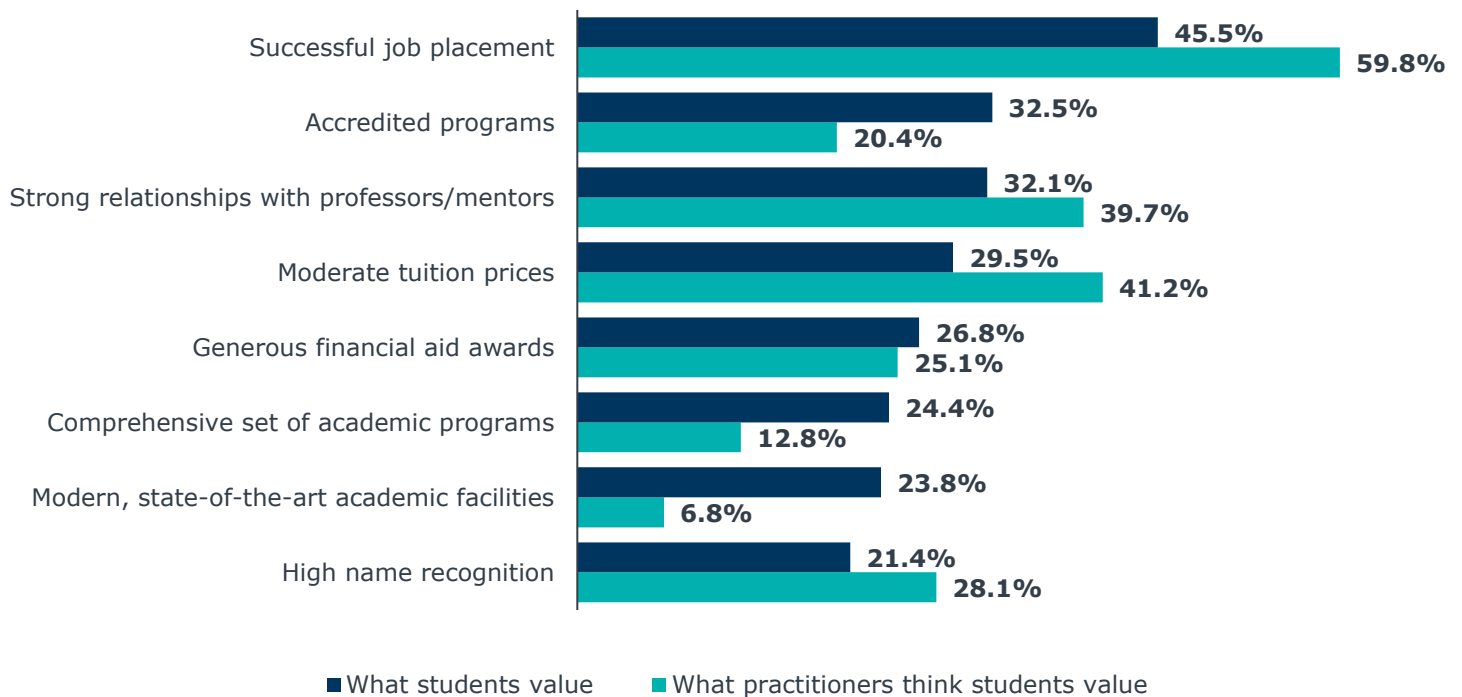# Keeping a Pulse on Prospects' Priorities

Some Misalignment in Factors Students Value—and the Criteria Practitioners Think They Value

Enrollment marketers want to ensure their messages speak to top student priorities, including job opportunities and opportunities to develop relationships with professors or other mentors at you institution. However, prospective graduate students' priorities fluctuate with the labor market and changes in their personal or professional lives. To ensure marketing materials will resonate with students, enrollment leaders must keep a finger on the pulse of macro- and micro-level indicators of student intent and tailor marketing messages to these intentions.

Our survey of prospective graduate students indicates students most value successful job placement, program accreditation, and strong relationships with faculty and mentors when selecting a program. When compared with our survey of graduate enrollment leaders, however, there is some misalignment in what students prioritize and what practitioners think students value most. Figure 7 below demonstrates that students place more value on program accreditation, an institution's full set of academic programs, and the quality of an institution's academic facilities than surveyed practitioners believed.

Figure 7: Job Placement and Program Accreditation Are Most Important to Grad Students

Q: What do you think is most important to prospective students when making an enrollment decision?

Factor	What students value	What practitioners think students value
Successful job placement	45.5%	59.8%
Accredited programs	32.5%	20.4%
Strong relationships with professors/mentors	32.1%	39.7%
Moderate tuition prices	29.5%	41.2%
Generous financial aid awards	26.8%	25.1%
Comprehensive set of academic programs	24.4%	12.8%
Modern, state-of-the-art academic facilities	23.8%	6.8%
High name recognition	21.4%	28.1%

■ What students value ■ What practitioners think students value

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Cost Continues to Be a Top Concern for Prospective Graduate Students

Almost 90% of surveyed enrollment leaders offer financial aid awards to graduate students. Survey respondents say their students most commonly receive:

- Federal loans (59%)
- Merit scholarships (36%)
- Graduate assistantships (32%)
- Need-based scholarships (31%)
- Private loans (26%)
- Grants (23%)

Key Takeaways

Marketing Is a Top Priority as Respondents Face Heightened Enrollment Goals

Sixty-six percent of survey respondents expanded marketing efforts in 2021, compared to 51% in 2020. As recruitment and enrollment goals grow, it is essential that graduate enrollment leaders increase marketing efforts. However, success depends on ensuring these efforts are backed by a robust enrollment strategy and key campaign performance data.

▶ *Resource:* To identify opportunities to improve your graduate enrollment strategy, complete this self-assessment.

The Pandemic Catalyzed Rapid Advances in Graduate Marketing Capabilities

In the early days of the pandemic, survey respondents added virtual events, prioritized personalized outreach from faculty and staff, and changed application deadlines to accommodate a newly virtual landscape. Many enrollment teams that did not make these changes in 2020 did so in 2021. These expanded marketing efforts and new, virtual capabilities signal a new normal in graduate enrollment management.

▶ *Resource:* Explore seven tactics for improving attendance and engagement at your virtual events.

The Factors Students Value Don't Always Match What Practitioners Think They Value

Surveyed students and enrollment leaders alike identified successful job placement, moderate tuition prices, and strong relationships with faculty and mentors among the factors most important to students making enrollment decisions. However, enrollment leaders overestimated the value students place on high name recognition and underestimated the importance of program accreditation and an institution's full program portfolio in students' decision-making process.

▶ *Resource:* To learn more about prospective graduate students' mindset and motivations, explore findings from EAB's survey of 2,000+ students.

Heightened Expectations Mean Increased Stress for Enrollment Teams

3

Increased Workload and Staff Shortages Take a Toll

Graduate Enrollment Leaders Report Heightened Professional and Personal Stress

Given the pressures outlined in the first section of this brief, it is no wonder that survey respondents reported high stress levels, both professionally and personally. This remained the case even as the pandemic began to wane post-vaccine. Forty-three percent of respondents said they are experiencing more stress in 2022 than in 2021—suggesting that factors beyond the uncertainty and challenges of COVID-19 are contributing to enrollment leaders' stress. Respondents most often attributed stress to added workload, staffing shortages, and Zoom fatigue. Notably, one-third of respondents said unrealistic goals are contributing to their stress at work.

Figure 8: Half of Survey Respondents Reported High Stress Levels

Q: How stressful are your current work and personal situations?

Level	Work	Personal
Extremely	16%	6%
Very	33%	20%
Moderately	38%	38%
Slightly	11%	30%
Not at all	2%	6%

49% of survey respondents indicated they are "extremely" or "very" stressed at work
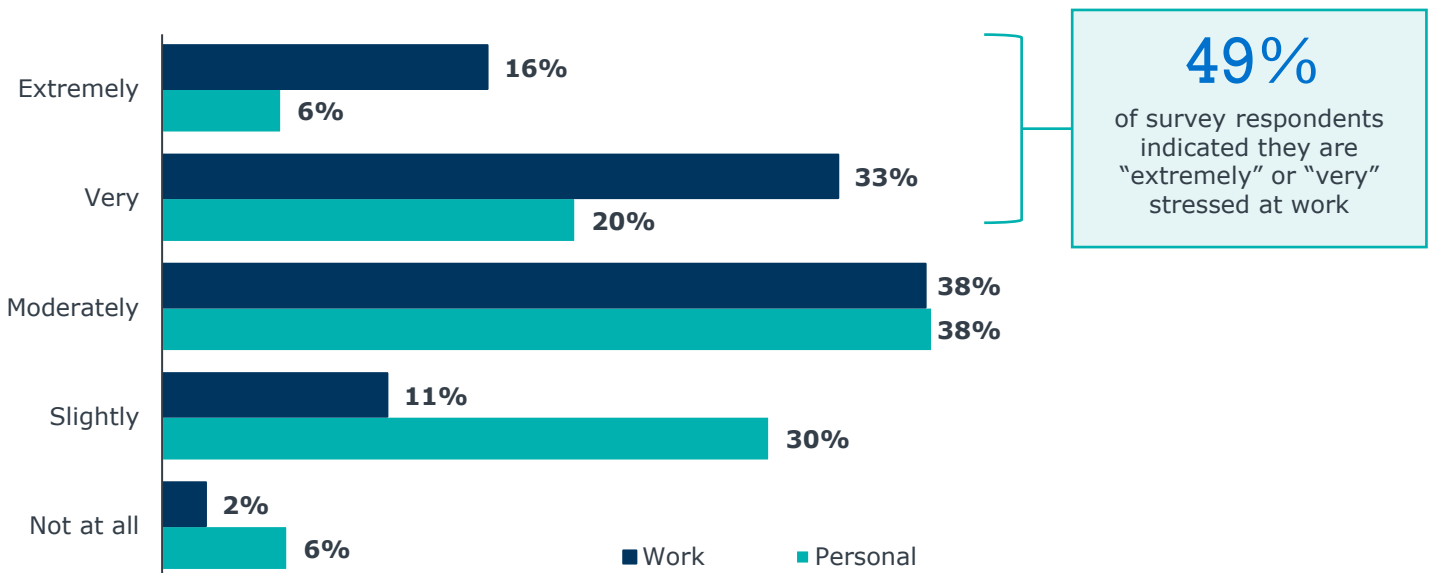
Figure 9: More Work and Higher Goals—but with Fewer Resources

Q: What factors are affecting your current stress level at work?

Factors	Response
Increased workload	60%
Department understaffed	60%
Zoom fatigue	52%
Health/safety of colleagues/family	48%
Personal health/safety	40%
Goals are not realistic	29%
Work hours increased	24%
Health/safety of students	23%
Lack of flexibility	21%

Participants' Current Work Situation
- 59% hybrid
- 31% in office/on campus
- 10% fully remote

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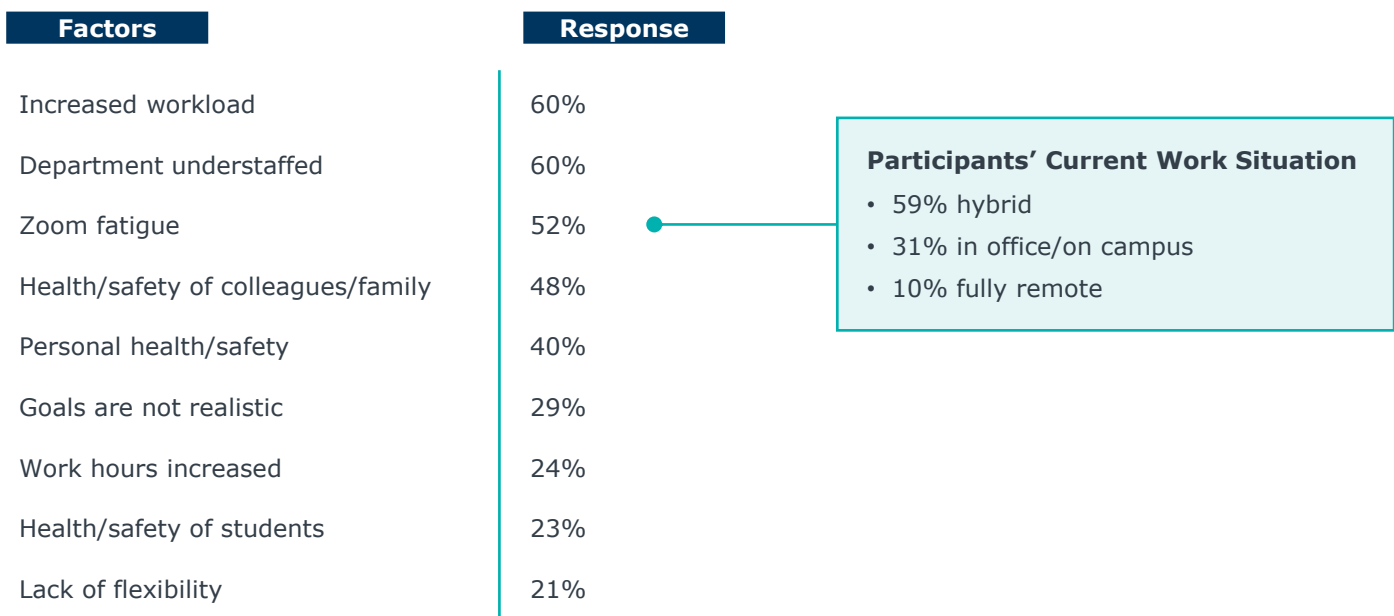
A Staffing Problem Poised to Become Worse

Staff Stress and Shortages Create a Vicious Cycle for University Leaders

Survey respondents identified "additional staff and filling vacant positions" as the top way their institution could alleviate work-related stress. Sixty-one percent of surveyed enrollment leaders had one or more unfilled positions in their department. At the same time, 40% of respondents said they are considering leaving their role, exacerbating an already challenging talent churn across higher ed. In total, higher education lost up to 11% of its workforce during the pandemic.[1] Although higher ed is on track to recover from this labor loss, talent management in 2022 is further strained by labor shortages, inflation, and competition in the endemic-era economy.

Figure 10: Top Factors That Would Ease Survey Respondents' Professional Stress

Q: What would alleviate the stress you are feeling at work?

Additional staff/fill vacant positions

Realistic goals

More flexibility (e.g., remote work, flexible hours)

Better pay

Better support/recognition from leadership
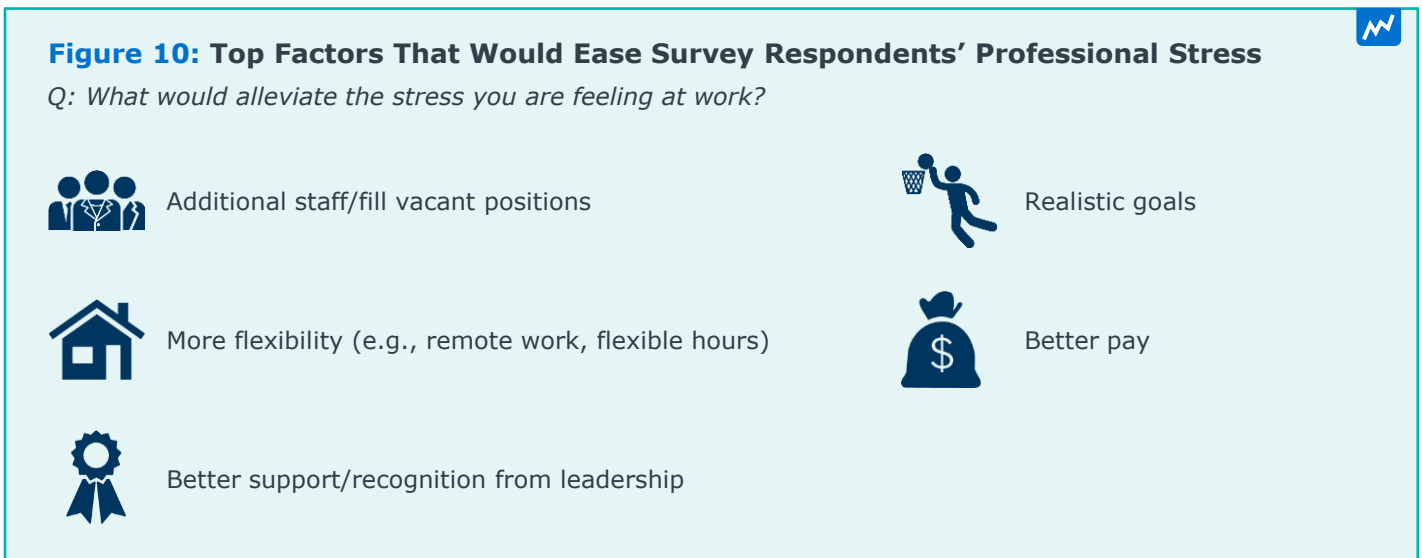
Figure 11: Is a Great Resignation Coming to Graduate Enrollment Management?

Q: At this time (late January 2022), are you considering leaving your current position?

Response	Percentage
No, not at this time	54%
Yes, for a position at another institution	15%
Yes, for a position outside higher education	14%
Yes, for another position at my institution	6%
Yes, considering all options	5%
Considering retiring	3%
Not looking, but open to leaving	3%

46%
Reported they are considering leaving their current position
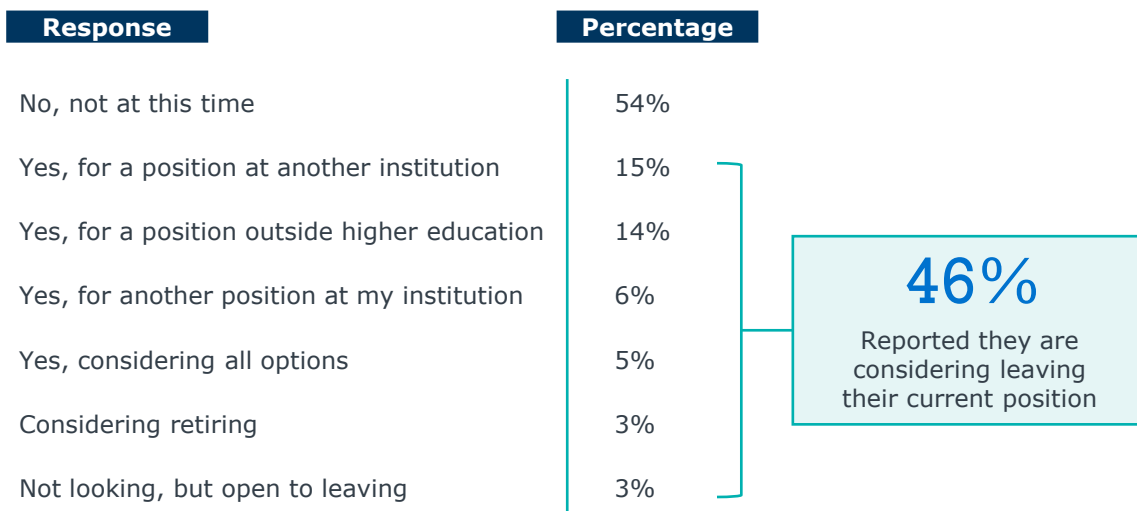
1) Estimated loss of workers in the college and university industry from January 2020-January 2021 (lowest employment level during pandemic).

Source: EAB analysis of the Current Employment Statistics Survey via the Bureau of Labor Statistics.

Supporting Enrollment Leaders' Mental Health

Q: How could your institution better support your mental health and wellness as well as that of your colleagues?

" **Lower expectations.** Trying to figure out how to do things virtually that have historically been done in person without additional resources is a bit unrealistic when also trying to balance remote learning and mental health on top of work."

" **Acknowledge staff burnout** (there is a lot of talk about student and faculty burnout, but little mention of how staff are feeling), hire more staff in high volume areas, and schedule fewer meetings."

" Our institution continues to try to implement major structural changes and there have been huge leadership changes and styles to manage in the midst of this. **Slowing the pace of change** might help."

" **Create a culture where we feel comfortable taking our accrued time**. Many of us have built up time over the past year, but it is hard to unplug and take time away, knowing the pressures we will face upon return."

Key Takeaways

Graduate Enrollment Leaders Are Experiencing Heightened Stress

Although it is not surprising that graduate enrollment leaders have experienced increased personal and professional stress across the last two years, the rate at which respondents reported extreme levels of stress is alarming. Nearly half of survey respondents said they are extremely or very stressed at work. Respondents attributed this stress to rising workload, staff shortages, and Zoom fatigue. To alleviate staff stress, university leaders should support flex hours, provide remote work options where possible, and consider changing or reducing goals.

▶ *Resource:* For tools and research to support mental health on campus, please visit EAB's Mental Health Resource Center.

Additional Resources Would Help Alleviate Graduate Enrollment Leaders' Stress

Survey respondents identified "adding staff and filling vacant positions" as the top factor that would alleviate their stress. But most institutions' budgets remain tight, and adding marketing and enrollment staff is not always feasible. University leaders should consider opportunities for external partnerships to support graduate enrollment strategy and/or marketing campaigns.

▶ *Resource:* Use these insights to advocate for resources to support graduate enrollment growth.

Many Graduate Enrollment Leaders Are Considering Leaving Their Positions

Nearly half of respondents said they are considering leaving their current position for another role at their institution, a job at a different institution, or for an opportunity outside of higher ed. To recruit and retain top talent, higher education leaders should borrow tactics from out of industry. Consider how your institution can better articulate an employee-centric brand to current and potential hires. Where possible, take advantage of the rapidly nationalizing talent market and invest in recruitment outside of your local region.

▶ *Resource:* For more research and tactics, please see EAB's research on counteracting the talent churn.

Research Methodology

▶ **Overview**

EAB's Adult Learner Recruitment researchers partnered with NAGAP to conduct eight flash polls of graduate enrollment leaders to understand their goals and challenges. The results shared in this report include responses from 1,216 unique participants from across 790 unique institutions. In addition to the survey findings, this report includes data and insight from EAB's analysis of 2020 and 2021 graduate enrollment trends and our annual survey of prospective graduate students.

▶ **Respondent Information**

Respondents	**Institutions Represented**	**Instruction Type**
1,216 unique respondents	790 unique institutions across 50 states • 51% private • 49% public	• 73% on-campus and online • 22% on-campus only • 4% online only

▶ **Research Time Frame and Focus**

Flash Poll 1

- Data collection: 9/22/20–10/2/20
- Topic: COVID-19 effects and responses
- Contributors: 468

Flash Poll 2

- Data collection: 10/19/20–11/9/20
- Topic: Perceptions of value
- Contributors: 424

Flash Poll 3

- Data collection: 12/14/20–1/7/21
- Topics: Enrollment metrics and DEI
- Contributors: 350

Flash Poll 4

- Data collection: 2/16/21–3/1/21
- Topic: Mental health and wellness
- Contributors: 369

Flash Poll 5

- Data collection: 3/17/21–3/30/21
- Topic: Effects of COVID-19
- Contributors: 329

Flash Poll 6

- Data collection: 10/28/21–11/3/21
- Topic: Enrollment metrics
- Contributors: 317

Flash Poll 7

- Data collection: 1/20/22–2/7/22
- Topic: Work environment
- Contributors: 325

Flash Poll 8

- Data collection: 3/1/22–3/21/22
- Topic: Financial aid and value
- Contributors: 273

EAB's **Adult Learner Recruitment**

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

STRATEGIZE ❯ ACQUIRE ❯ ENGAGE ❯ YIELD

170+ Partner Institutions   **No Two Partnerships Alike**

STRATEGIZE

We go beyond OPMs and digital marketing agencies to help you develop a plan to succeed in this dynamic market. Starting with a deep understanding of your institution's needs and goals, our team of experts provides guidance on critical topics such as program and portfolio design, growth opportunities, organizational design, pricing strategy, corporate partnerships, and more.

ACQUIRE

We generate a large audience from a diverse mix of proprietary sources—including our consumer database and Cappex's student search platform—and other sources including first-party digital targeting lists, test-taker lists, your institution's inquiry pool, recent alumni, and current undergraduates. Our lead generation experts partner with your team to develop a strategy that will meet your enrollment and class-shaping goals.

ENGAGE

We drive enrollment results with responsive campaigns choreographed across channels and customized to each student's intent and behavior. We engage prospective students at every stage of their journey from awareness to application using micro surveys, responsive landing pages, behavioral campaign flows, data informed creative, and a streamlined application experience.

YIELD

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

WHAT MAKES EAB DIFFERENT

Strategy Transformation + Unrivaled Access + Marketing Orchestration + Intelligent Analytics

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

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.

Adult Learner Recruitment

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ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of 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 five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). 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.