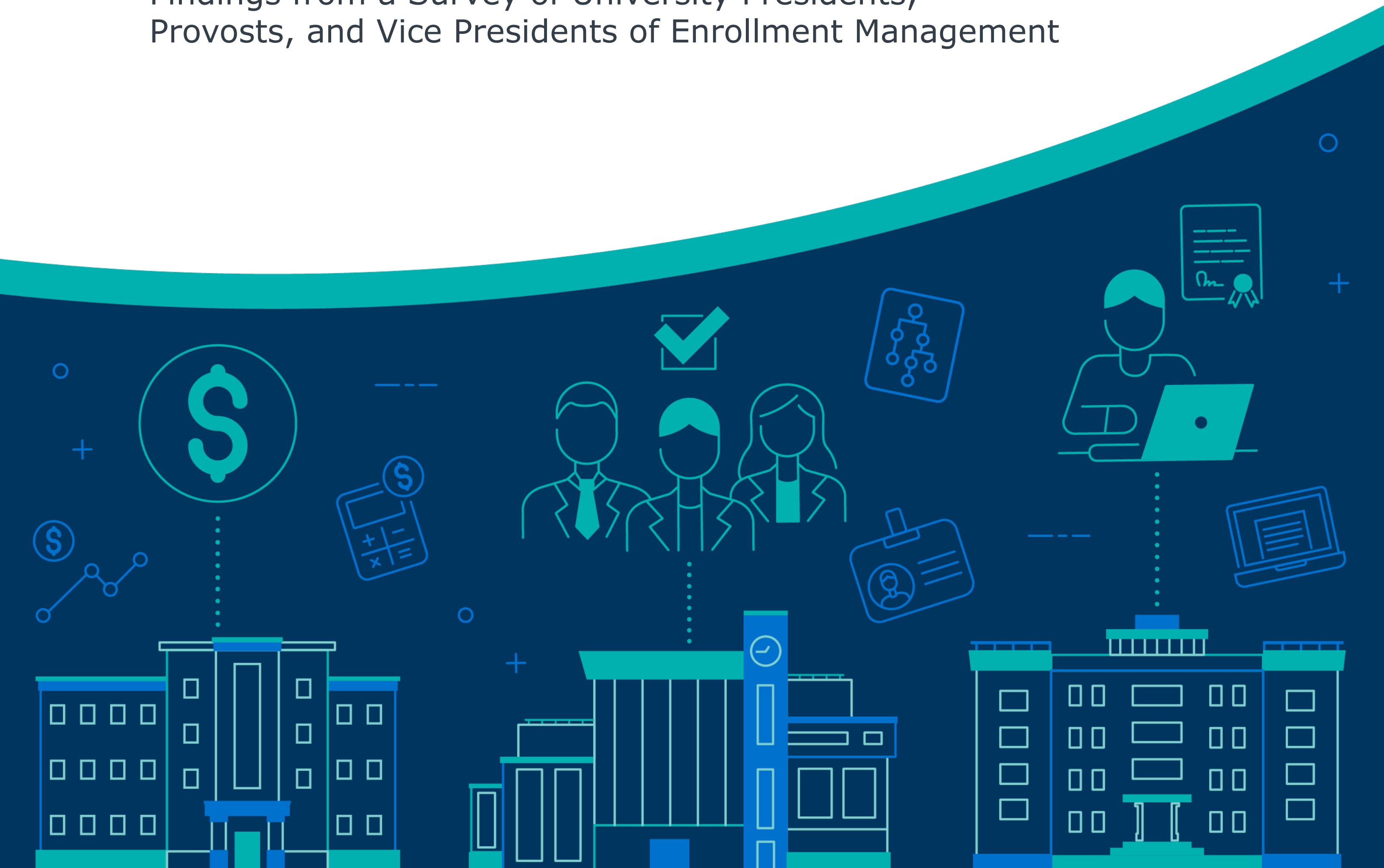
ADULT LEARNER RECRUITMENT

The Big Bets University Leaders Are Placing on Graduate and Adult Enrollment

Findings from a Survey of University Presidents, Provosts, and Vice Presidents of Enrollment Management



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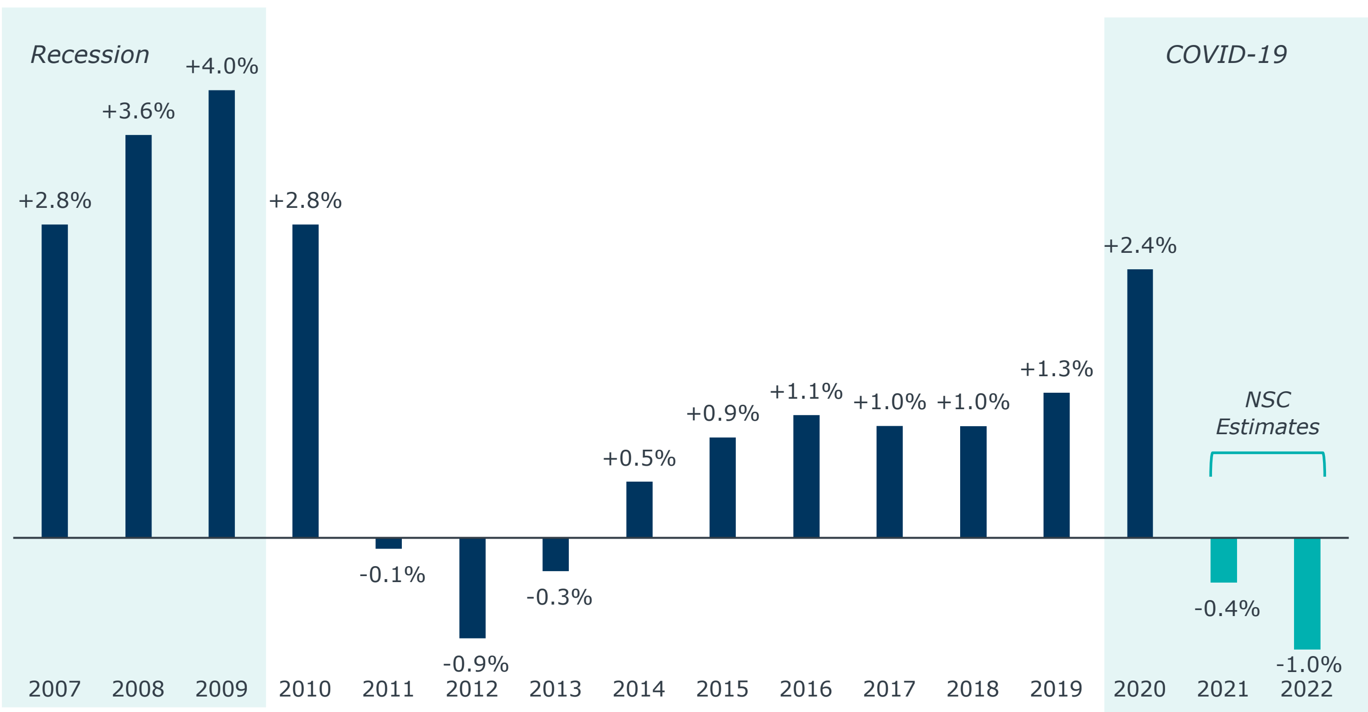
The Pressure on Graduate Enrollment Is Growing—Just as the Market Is Slowing

For nearly a decade, graduate programs were a source of enrollment growth for many institutions. This growth was spurred, in part, by an unfavorable labor market, the rise of distance education, and a global pandemic. During the height of the pandemic, graduate and adult-serving programs were many institutions' only source of enrollment growth as undergraduate enrollments suffered.

Now, for the first time since 2013, the National Student Clearinghouse (NSC) estimates that graduate enrollment declined in 2021 and 2022. Despite this decrease, graduate and adult student enrollments are still higher than pre-pandemic levels and a bright spot for many institutions struggling with persistent undergraduate enrollment declines. **The result: growing pressure on graduate enrollment, at a time when this market is becoming more challenging.**

Historical Changes in Graduate Enrollment

Year-on-Year Growth of Total Graduate Enrollments—All 4-Year Institutions, 2007—2022[1]



Troubling Trends in Undergraduate Enrollment

Undergraduate enrollment deficits continue to place outsized pressures on revenue from graduate and adult enrollments to make up the gap.

-12.4%

Decline in undergraduate enrollment, 2010–20

32%

of US 18–24-year-olds opting not to pursue higher education

-11%

Decrease in demand for institutions outside of the top 100, 2025–30

1) Graduate enrollment in the NCES data reflects master's and doctoral enrollments. There is no separation of the two data points in the enrollment data files.

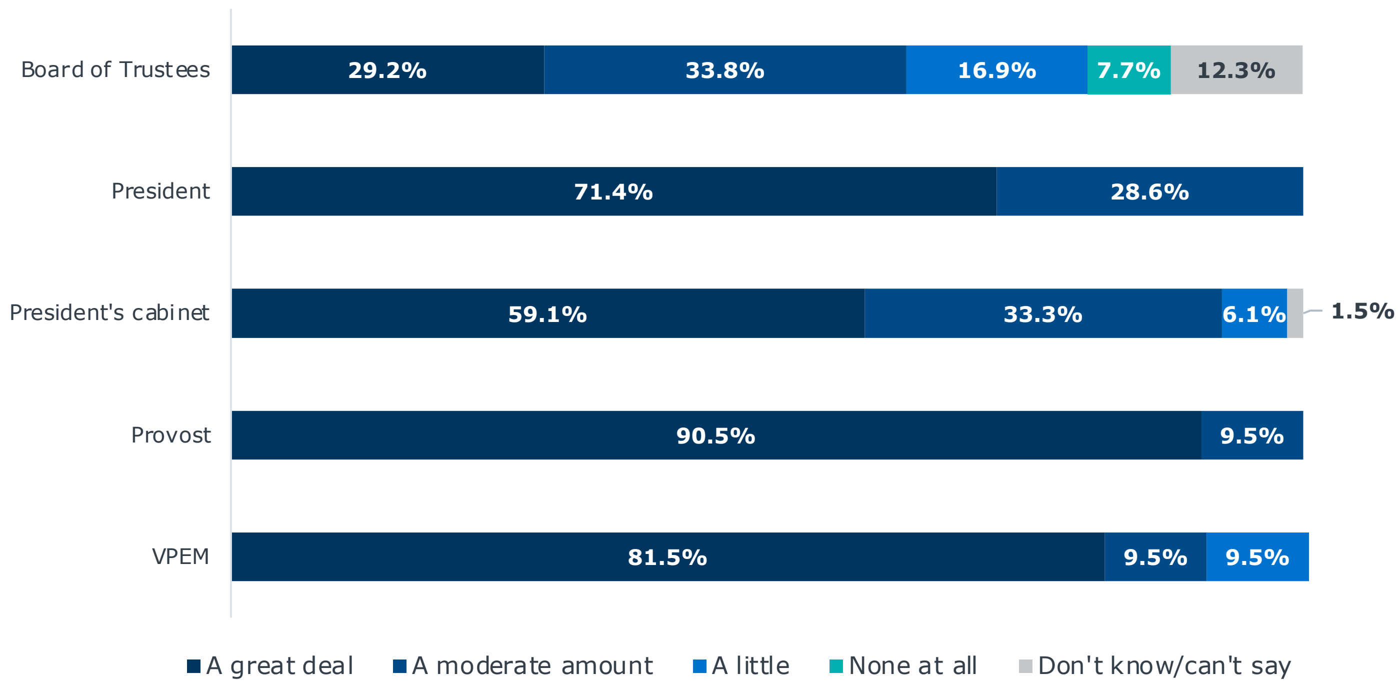
Source: EAB Analysis of American Community Survey Data, NCES; Graw, Nathan D., *The Agile College: How Institutions Successfully Navigate Demographic Changes*, 2021.

Leadership Is Prioritizing Graduate & Adult Enrollment

One Constant: The Growing Importance of Graduate and Adult Enrollment

Although graduate and adult learner enrollments have fluctuated in recent years, one thing remains evident: higher education leaders are prioritizing graduate and adult-serving programs and enrollment. One hundred percent of surveyed university presidents and provosts indicated graduate and adult learner enrollment is a strong or moderate priority.

To what extent is increasing graduate and adult learner enrollments a moderate or significant priority for leaders across your institution?



Grad and Adult Enrollment Is a High or Moderate Priority for…

100% of surveyed presidents

100% of surveyed provosts

91% of surveyed VPEMs

How Are University Leaders Approaching Graduate and Adult Learner Enrollment?

To learn more about how higher ed leaders are approaching graduate and adult enrollment, EAB surveyed more than 60 university executives, including presidents, provosts, vice presidents of enrollment management, and chief business officers from across the United States. Use the survey findings in this report to shed light on how your institution's approach to graduate and adult enrollment compares and to spur conversations on campus. For more information about survey participants and methodology, please see **page 16** of this report.

Source: EAB research and analysis.

University Leaders Are Betting on New Programs and Online Offerings

SECTION 1

Graduate Enrollment Goals Are Increasing

Expanding Goals in an Effort to Grow Enrollment and Revenue

Tuition revenue from graduate and adult-serving programs comprises a relatively small portion of total net tuition revenue (NTR) at respondents' institutions. However, shortfalls in undergraduate enrollment—the primary source of NTR at most institutions—mean that graduate and adult-serving programs face more pressure than ever to grow enrollment and revenue. University leaders are increasing their goals accordingly.

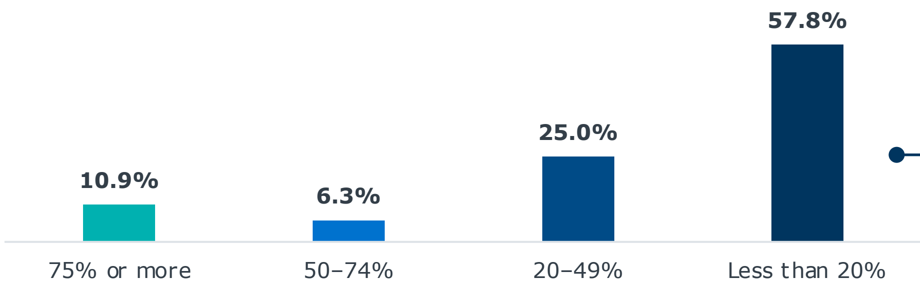
Eighteen percent of survey respondents said their enrollment goals for graduate and adult-serving programs have increased significantly since the start of the pandemic (i.e., by 3 percent or more), while 34 percent shared their enrollment goals have increased slightly (i.e., by 0 to 3 percent).[2]

51%

of respondents said **enrollment goals** for their graduate and adult programs have **increased** since the start of the pandemic

Tuition Revenue from Grad and Adult-Serving Programs Still a Relatively Small Piece of the Pie

Approximately what percentage of your institution's total NTR comes from graduate and adult programs?



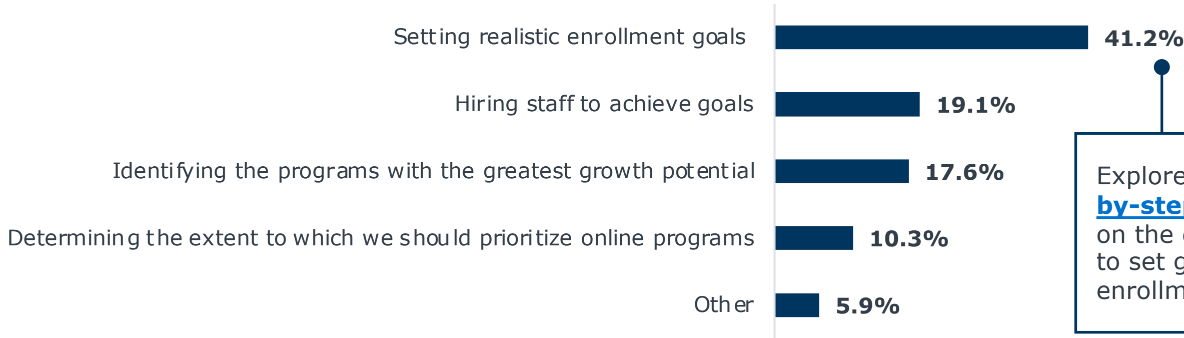
Although net tuition revenue from graduate programs remains small relative to undergraduate NTR at most respondents' institutions, there is a **growing reliance on tuition from graduate and adult programs** as undergraduate enrollment slows.

But Setting Growth Goals Has Been Difficult

Aside from weathering myriad health and safety challenges during the pandemic, graduate and adult-serving programs were still tasked with growing enrollment at many institutions. When asked about the operational challenges they faced during the pandemic related to their graduate and adult-serving programs, 41 percent of survey respondents identified "setting realistic enrollment goals" as the most difficult. Other top operational challenges included "hiring staff to achieve goals" and "identifying programs with the greatest growth potential."

Goal-Setting and Hiring Identified as Top Challenges Spurred by the Pandemic

What has been the most difficult aspect of your operations due to the COVID-19 pandemic? (Responses >5%)



Explore this **step-by-step guide** on the data needed to set graduate enrollment goals.

2) EAB researchers used historical enrollment growth data from 2014 to 2019 to determine realistic ranges for enrollment growth in the coming years.

Source: EAB research and analysis.

Prioritizing New Programs

Launching New Programs to Grow Enrollment

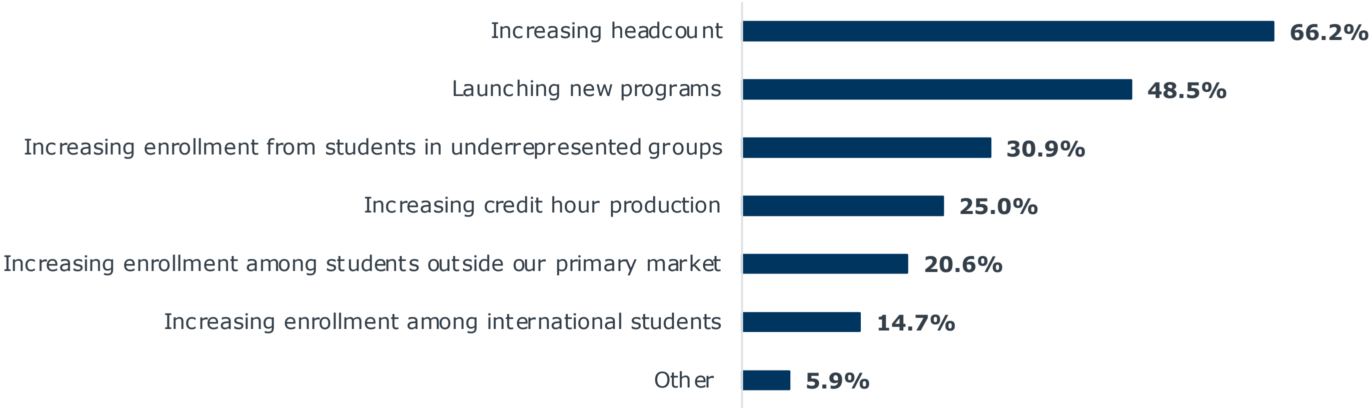
Most survey respondents are expanding their graduate and adult education program portfolios to meet growing enrollment goals. Fifty-six percent of respondents have increased their graduate and adult education offerings in the last three years, and nearly half identified launching new programs as a top priority. Respondents most often identified allied health, business, and nursing as the disciplines they believe have the greatest potential for enrollment growth at their institutions.

56%

of respondents have **increased the number of programs** in their graduate and adult education portfolio since spring 2020

Respondents Are Prioritizing Headcount, Program Launch, and Domestic Diversity

What are the top enrollment priorities with respect to your institution's graduate and adult-serving programs? (select up to three)



Allied Health, Business Programs Have the Greatest Growth Potential, According to Respondents

Which of the following do you believe have the greatest potential for enrollment growth? (select up to three)

Program Area	Response[3]	Related Resource
Allied Health	60.9%	What does the strong employer demand for speech-language pathologists mean for your university?
Business	54.7%	How higher ed can adapt to a changing MBA landscape
Nursing	45.3%	Tackle the two biggest challenges facing nursing programs
Education	34.4%	How one college of education reversed enrollment declines
Engineering	21.9%	The strategies one graduate school used to grow enrollment in STEM programs
Other	20.3%	Considering launching a data analytics program? Here's what you need to know.

Most common "other" responses include leadership, criminal justice, cybersecurity, and data analytics programs.

3) Refers to the percentage of respondents who identified each program area as one with the greatest growth potential.

Source: EAB research and analysis.

The Online Opportunity

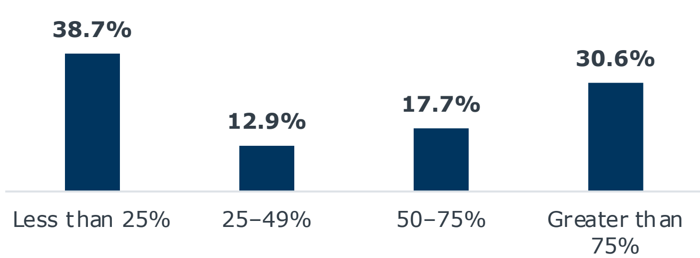
Expanding Online Offerings Is a Top Priority

Student, faculty, and administrators' experience with online education during the pandemic and the ongoing perception of online programs as a panacea to enrollment challenges have placed more pressure on graduate and adult-serving units to expand online offerings. More than 80 percent of respondents said expanding online enrollment and/or offerings is a high or moderate priority for their institution. Survey respondents are split on the extent to which they offer online programs currently. About 39 percent of respondents say less than 25 percent of their programs are offered online, while another 31 percent offer more than 75 percent of their graduate and adult offerings online.

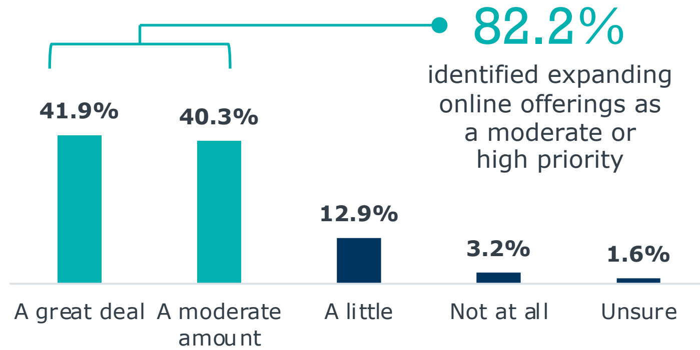
What About Hybrid Options?

Expanding hybrid or low-residency offerings is a relatively low priority for survey respondents when compared to growing fully online options. Only **16 percent** of respondents identified expanding hybrid/low-residency options as a high priority for their institution.

What portion of your graduate and adult-serving programs are currently offered online?



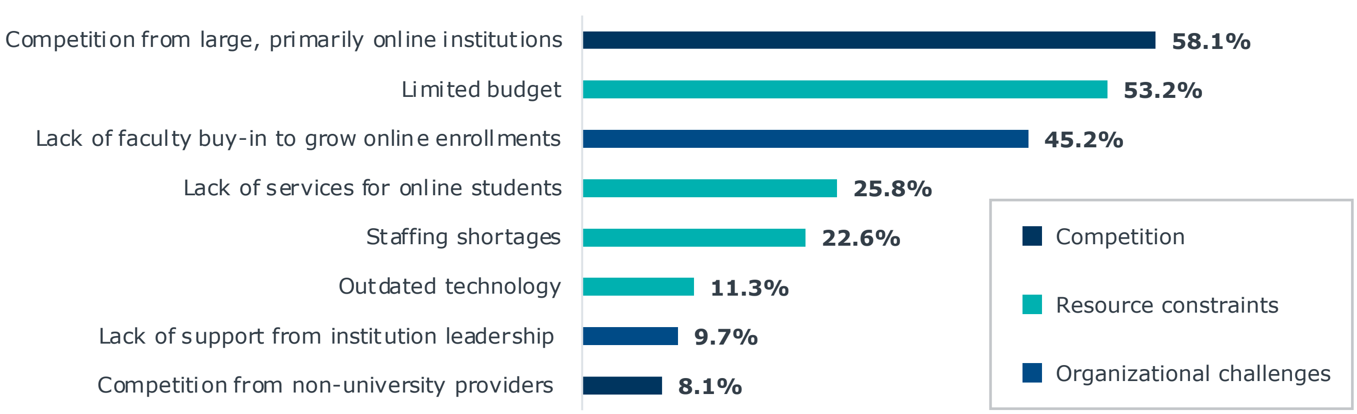
To what extent is expanding online enrollment/offerings a priority for your institution?



Competition, Budget, and Lack of Faculty Buy-In Hinder Online Growth

While graduate enrollment at primarily online institutions has fallen 7.7 percent since the start of the pandemic according to NSC projections, survey respondents identify competition from these institutions as an ongoing barrier to online enrollment at their institutions. Other top barriers to online enrollment growth include budget limitations, lack of faculty buy-in, and limited support services for online students. Notably, university presidents who participated in the survey disproportionately identified "lack of faculty buy-in to grow online enrollments" as a top barrier to growing online.

What are the greatest barriers to growing online enrollment for graduate and adult-serving programs? Please select up to three.



Source: EAB research and analysis.

Leadership Expects Enrollment to Increase—but Growth Won't Be Easily Won

SECTION

2

Internal and External Barriers to Growth

Competition and Resource Limitations Pose Real Obstacles

Survey respondents most often identified competition, resource constraints, and internal organizational challenges as the barriers they face to growing graduate and adult learner enrollment. Respondents are concerned primarily with competition from other colleges and universities (55 percent), while just 11 percent identified competition from non-university providers such as Grow with Google as a top barrier to enrollment growth.

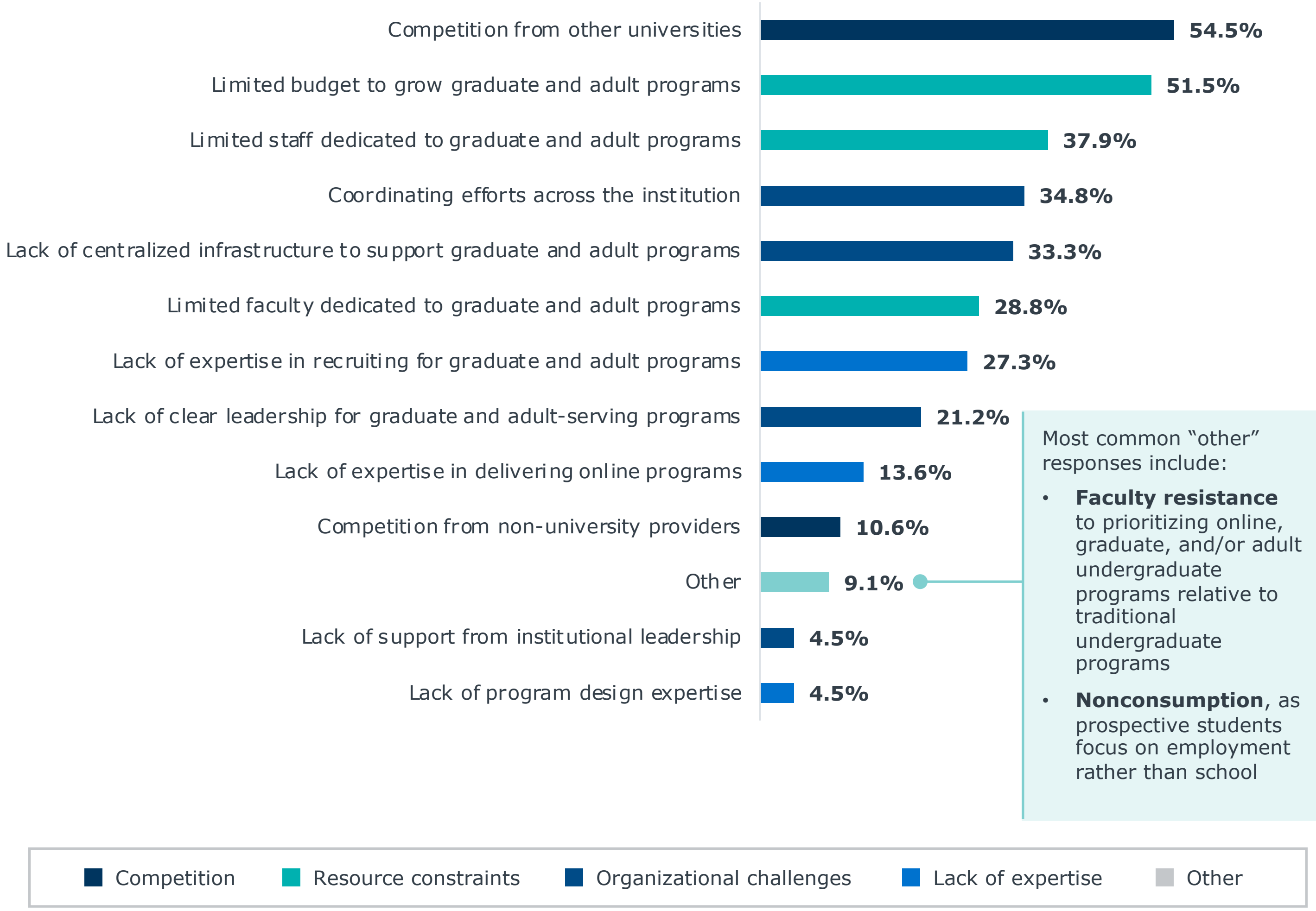
As discussed in greater detail on the following pages, organizational challenges remain a common hurdle. Survey respondents who work at public institutions disproportionately identified "coordinating efforts across the institution" and "lack of clear leadership for graduate and adult-serving programs" as top challenges. College and university presidents across all institution types also disproportionately reported "lack of clear leadership for graduate and adult-serving programs" as a barrier to enrollment growth.

Optimism About Growth

Despite these challenges, university leaders are optimistic about the potential to grow enrollment: 30.8 percent expect graduate and adult enrollment at their institution to grow significantly (i.e., by more than 3 percent) in the next three years. 56.9 percent expect enrollment to grow by 0-3 percent in that period.[4]

More than Half of Respondents Identified Competition from Peers as a Top Challenge

What are the greatest challenges facing your graduate and adult-serving programs when it comes to increasing headcount? Select all that apply.



Most common "other" responses include:

- **Faculty resistance** to prioritizing online, graduate, and/or adult undergraduate programs relative to traditional undergraduate programs
- **Nonconsumption**, as prospective students focus on employment rather than school

4) EAB researchers used historical enrollment growth data from 2014 to 2019 to determine realistic ranges for enrollment growth in the coming years.

Source: EAB research and analysis.

Resources Not Increasing in Tandem with Expectations

Staffing at a Standstill, Despite Pressure to Grow Graduate and Adult Education Offerings

The combined impact of pandemic-era scarcity and the Great Resignation has made staffing a persistent challenge for units across an institution. Graduate and adult-serving units are not immune from talent shortages. Despite total enrollment growth in graduate and adult-serving programs and the expectation that these programs will continue to grow, few respondents have increased the number of staff supporting graduate and adult programming in recent years. Sixty percent of respondents reported no change in staffing for graduate and adult education programs, which may impact some institutions' ability to grow enrollment. As illustrated on page 10, nearly 40 percent of respondents identified "limited staff dedicated to growing graduate and adult programs" as a top barrier to enrollment growth. This staffing challenge is not expected to dissipate any time soon. EAB and NAGAP's survey of graduate enrollment practitioners indicates 46 percent are considering leaving their current role.

Staffing Challenges Extend Across Higher Ed

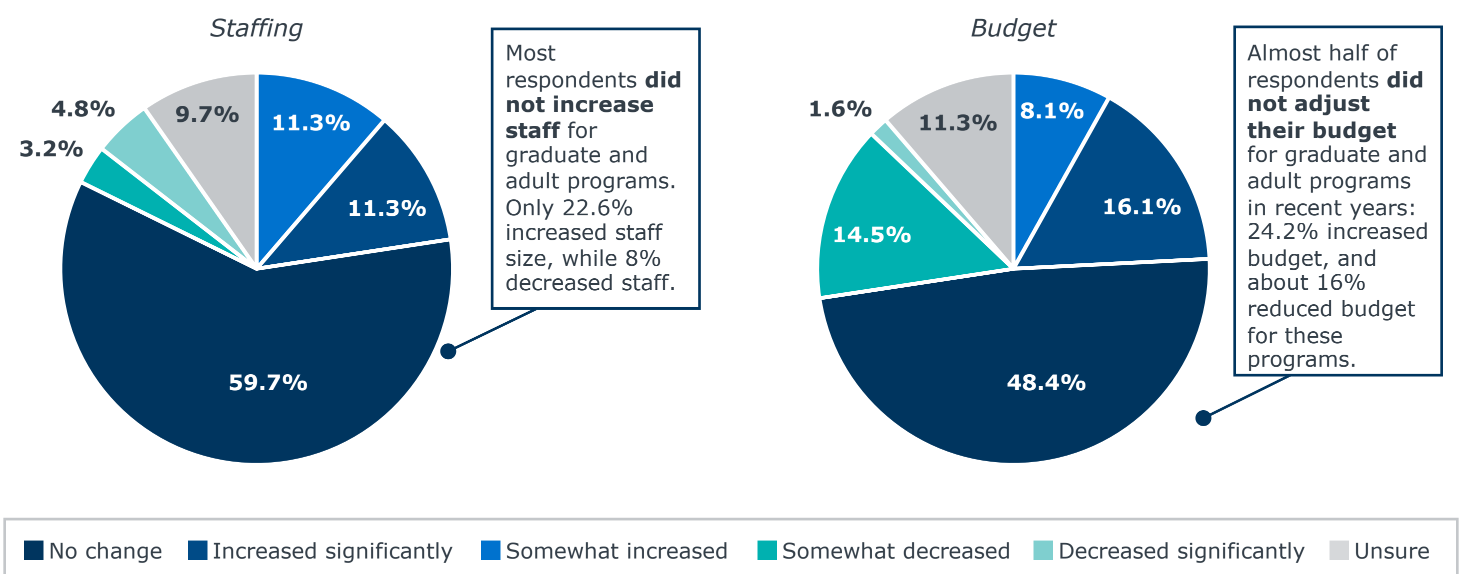
-11% **Loss of workers** across higher education from 2020 to 21[5]

50–60% Expected **turnover in higher education leadership** in the next year (vs. 30% in typical year)

Budget Limitations Hindering Enrollment Growth

It comes as no surprise that budgets for graduate and adult programs did not increase during the pandemic, a time during which many institutions' budgets were frozen or shrank. Nearly half of respondents reported no change in budget for graduate and adult programs in the last three years. However, graduate and adult programs were the primary source of enrollment growth at many institutions during this period. And, as noted on the previous page, 52 percent of respondents identified budget shortfalls as a barrier to enrollment growth.

How has the number of staff/budget dedicated to graduate and adult-serving programs tracked since spring 2020?



5) Estimated loss of workers in the college and university industry, January 2020-January 2021 (lowest employment level during pandemic).

Source: EAB analysis of the Current Employment Statistics Survey via the Bureau of Labor Statistics; P.Basken, "US universities anticipating major leadership turnover post-Covid," *Times Higher Education*, July 2021; EAB research and analysis.

Organizational Structure Is a Persistent Challenge for University Leaders

SECTION 3

Who Owns Graduate and Adult Enrollment?

Organizational Design Is a Common Concern for Grad and Adult-Serving Units

In addition to the resource constraints outlined on page 11, one of the most persistent challenges graduate and adult-serving units are facing is organizational structure. There is significant variety in how graduate and adult-serving units are structured and where these units live within the larger institution's organizational structure, especially when compared to their undergraduate counterparts. These differences in organizational structure can make it difficult to benchmark staffing and resource allocations against peers.

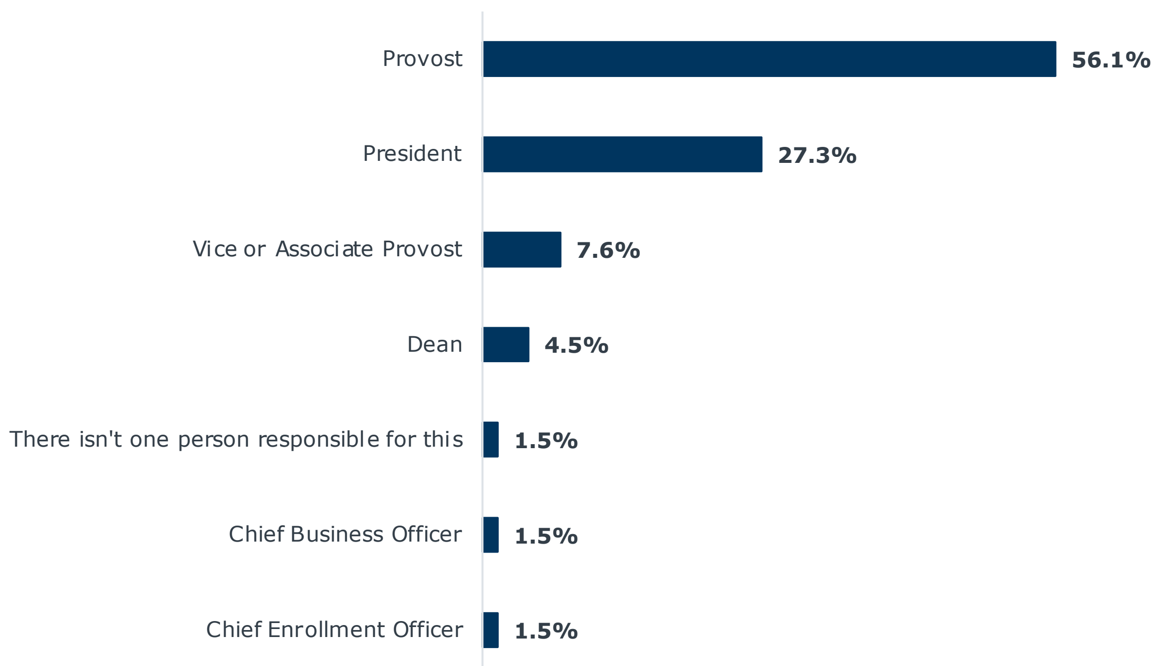
56%

of respondents reported that the senior-most executive overseeing graduate and adult-serving programs **reports to the provost**

At most respondents' institutions, the senior-most executive overseeing graduate and adult education reports directly to the provost or president, a testament to the importance of graduate and adult enrollment. However, graduate and adult enrollment leaders also report to vice or associate provosts, deans, chief business officers, and chief enrollment officers, according to survey respondents.

Graduate and Adult Education Leaders Most Often Report to the Provost

To whom does the senior-most executive overseeing graduate and adult-serving programs at your institution report?



Organizational Structure Differs Largely Based on Institution Type

Survey respondents who work at private institutions disproportionately said that the senior executive overseeing graduate and adult programs reports directly to the university president.

Source: EAB research and analysis.

Marketing Models Split—but Most Partner Externally

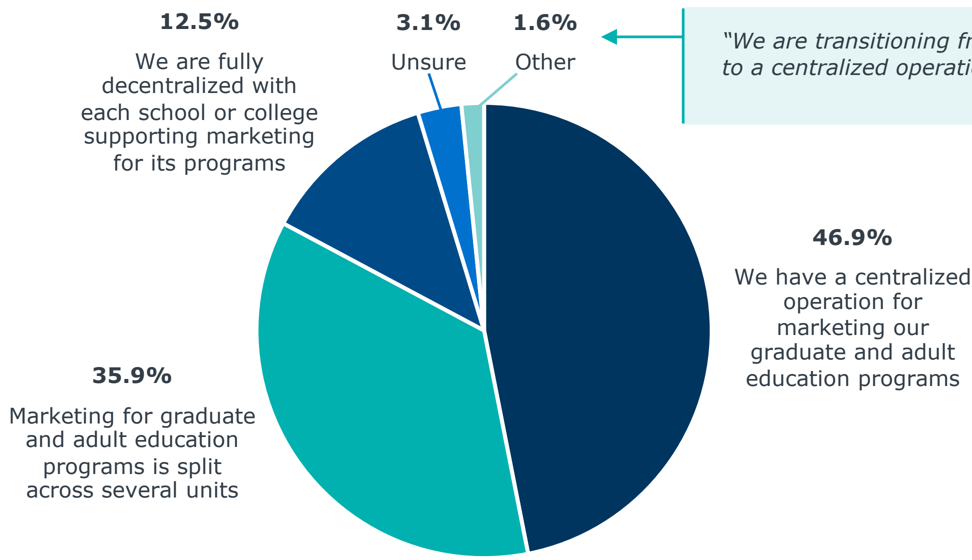
To Centralize or Decentralize

Another persistent organizational design question leaders of graduate and adult-serving programs are facing is whether to centralize marketing. About 48 percent of respondents operate under a decentralized model, whether fully decentralized (13 percent) or somewhat decentralized, i.e., with marketing split across several units (36 percent). A near-equal number of respondents (47 percent) organize marketing centrally. Respondents who work at private institutions were especially likely to operate under a centralized marketing model.

The best-fit marketing model can vary on an institution-by-institution basis. However, EAB research indicates a growing number of institutions are moving toward a centralized marketing model. Centralized marketing models can make it easier to share knowledge, accelerate decision-making, and scale marketing efforts.

Respondents Split on Centralized or Decentralized Marketing Models

Which of the following best characterizes marketing for graduate and adult-serving programs at your institution?



"We are transitioning from fully decentralized to a centralized operation."
- Survey respondent

Most Respondents work With an External Partner to Support Marketing Efforts

Nearly three-quarters of respondents work with an external vendor to support and grow enrollment in their graduate and/or adult-serving programs. Survey respondents most often partner with a digital marketing agency or online program management (OPM) provider.

53.2% work with a **digital marketing agency**

27.4% work with an **OPM**

24.2% work with another vendor type

Source: EAB research and analysis.

Key Takeaways

Graduate Programs Face Pressure to Grow—and Will Need to Win on Execution

Growing graduate enrollment at a time when undergraduate enrollment continues to fall short has led many institutions to increase their focus on graduate and adult learner enrollments. But for the first time in nearly a decade, graduate enrollment is projected to have declined in fall 2022. This means that graduate and adult programs are facing significant pressure to grow enrollment and NTR at a time when the market is becoming more challenging. Given these pressures, successful execution of a graduate and adult learner enrollment strategy will become more important than ever.

University Leaders Are Betting on New Programs, Especially Online

More than half of survey respondents are increasing enrollment goals for their graduate and adult-serving programs. To meet these goals, many respondents are launching new programs, with the expectation that allied health, business, and nursing programs will fuel graduate and adult enrollment growth. More than 80 percent of respondents are prioritizing online programs to meet growing graduate and adult enrollment goals. Choosing the right programs to launch or refresh will make a significant difference in institutions' ability to meet their graduate and adult enrollment goals.

Institutions May Not Have the Resources to Meaningfully Grow Enrollment

Although university leaders expect graduate and adult-serving programs to grow, the staff and budget allocated to these programs have not been increased. These resource limitations present barriers to enrollment growth. Respondents also cite competition from other institutions and difficulty coordinating across the institution as the greatest challenges to growing graduate and adult enrollments. For institutions unable to sufficiently increase staff and/or budget allocated to graduate and adult programs, outsourcing to an external partner can provide much-needed expertise and support.

Navigating a Decentralized Model Is a Persistent Challenge

Organizational design is a persistent challenge for graduate and adult programs, which often lack the centralized infrastructure of their undergraduate counterparts. For example, there is significant variety to whom senior-most graduate and adult enrollment leaders report. About half of survey respondents also work at institutions with a decentralized approach to marketing graduate and adult-serving programs. This decentralization can lead to slow decision-making and can limit knowledge-sharing.

Research Methodology and Additional Reading

About the Research

EAB's Adult Learner Recruitment and University Research teams conducted a survey of college and university executives in summer 2022 to learn more about their approach to graduate and adult education programming and enrollment. The results in this report include responses from 64 higher education leaders. In addition to the survey findings, this report includes insights from EAB's analysis of enrollment, degree conferral, and employment data.

Profile of Survey Respondents

Job Title	Percentage
President	21.0%
Provost	17.7%
Vice or Associate Provost	17.7%
VPEM	24.2%
Chief Business Officer	1.6%
Dean	9.7%
Other	9.7%

Institution Type	Percentage
Private, not-for-profit	57.4%
Public, not-for-profit	42.6%
For-profit	0.0%

Carnegie Classification	Percentage
Very high research	11.8%
High research or doctoral/research	23.5%
Master's	45.6%
Baccalaureate	19.1%

Total Enrollment*	Percentage
Fewer than 5,000 students	51.5%
5,000–9,999 students	16.2%
10,000–14,999 students	14.7%
15,000–19,999 students	4.4%
20,000 students or more	13.2%

**Includes all undergraduate and graduate students*

Additional Reading

For additional insights, explore the following research briefs:

- Enrolling Your Future Graduate and Adult Learner: What 2,000+ Graduate, Online, and Online Students Want You to Know About Their Journey to Enrollment
- The State of Graduate Enrollment Management: Insights from EAB and NAGAP's Surveys of 1,200 Graduate Enrollment Leaders
- Developing and Marketing Online Programs: A Primer for Online Growth in a Post-COVID World

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 **lexrubyhowe@eab.com**. Learn more at **eab.com/ALR**.

EAB

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Your Imperatives Determine Ours

INSTITUTIONAL STRATEGY

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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

Project Director

Tess Wallenstein

Contributing Consultants

Elizabeth Donaher
Jennifer Lerner
Kevin Shriner

Survey Research Consultants

Anne Dodson
Pam Kiecker Royall

Cover Design

Mary Britton

Executive Director

Lex Ruby-Howe

EAB

202-747-1000 | **eab.com**

@eab @eab_ @WeAreEAB @eab.life

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.