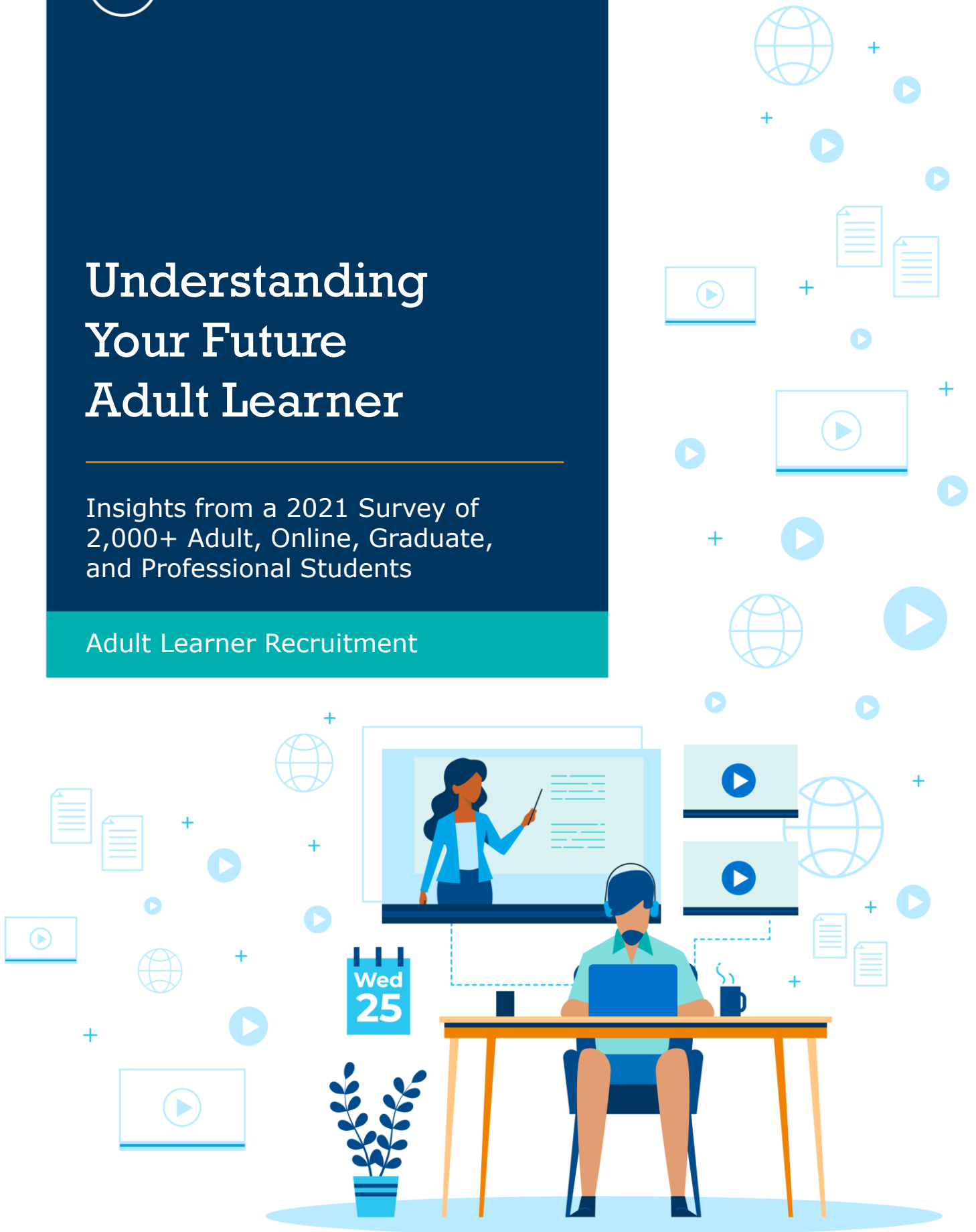




Understanding Your Future Adult Learner

Insights from a 2021 Survey of
2,000+ Adult, Online, Graduate,
and Professional Students

Adult Learner Recruitment



EAB Adult Learner Recruitment

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Introduction

A Maturing Adult Education Market Requires Smart Decision-Making

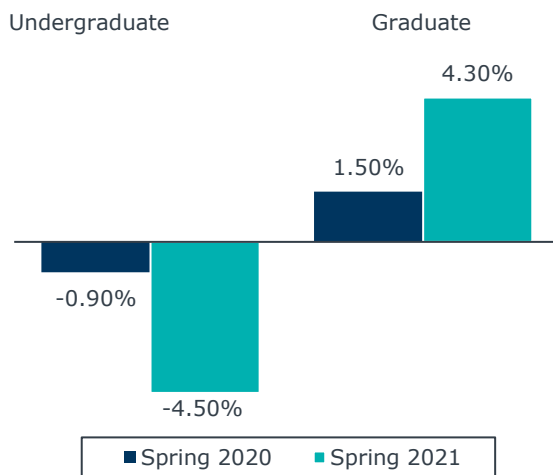
Before and during the COVID-19 pandemic, adult, graduate, online, and professional programs did the important work of offsetting enrollment declines in traditional undergraduate programs. Across 2020 and 2021, graduate programs were one of the few growing segments in higher education.

But the gold rush years in adult and graduate education are behind us. The National Center for Education Statistics projects that graduate enrollment will grow by less than 1 percent across the next decade. For an institution to grow their slice of the pie, they will need to have a clear understanding of their future adult learner, offer the right mix of programs, and shore up their strategy to enroll and support this audience through to graduation and into the workforce.

For enrollment leaders, the work to recruit and serve your future adult learner begins now.

A Look Back at Recent Growth...

Graduate Enrollment Was One of the Few Growing Segments



...And the Troubling Forecast Ahead

Growth Is Slowing and Competition Is Intensifying

<1% Average annual graduate enrollment growth projected by NCES, 2021-29

75% Of strategic plans list graduate or adult education as a priority¹

15% Average revenue growth goal for Deans of Professional and Adult Education²

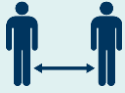
Understanding Your Future Adult Learner

To help our partners recruit and serve their future adult learners, EAB surveyed more than 2,000 current and prospective adult, graduate, online, and professional students about the impact of the COVID-19 pandemic on their enrollment plans. The following pages include lessons from the survey as well as strategies that will help your institution respond to these trends. Ultimately, the research and recommendations in this report are intended to help your institution become nimbler and better able to respond to both future crises and the day-to-day realities of the recruitment ecosystem.

Source: <https://nscresearchcenter.org/stay-informed/>, Spring 2020 Enrollment as of Feb. 11; IPEDS Data Center, National Center for Education Statistics, 2020; "Postsecondary Institution Revenues," *NCES The Condition of Education*, 2018; EAB interviews and analysis.

1) Based on EAB review of 36 randomly selected strategic plans representative of different institutional types.
2) Gross annual revenue

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The Impact of COVID-19

Insight from Students, in Their Own Words

For Some Students, the Pandemic Fast-Forwarded the Journey to Enrollment

Thirty-five percent of all surveyed students said the COVID-19 pandemic impacted their education plans. But the ways in which the pandemic affected students and their journeys to enrollment vary significantly.

For some, the pandemic accelerated their desire or ability to return to school. Survey respondents who say COVID-19 enabled them to pursue graduate education more quickly cite the additional flexibility of remote work or online instruction as key in their accelerated timeline. Others say the pandemic altered their perspective and priorities, leading them to pursue graduate education sooner than they had anticipated. The quotes below reflect just some of the ways the pandemic impacted students and their educational plans.

The Pandemic as an Accelerant to Students' Education Plans

Free Responses on the Impact of COVID-19

“

COVID actually made my plans more attainable. Because I have worked from home for the past year, what I saved in commuting time and down-time at my job gave me the opportunity to squeeze in time to work on a second master's degree.”

“

Although I faced challenges, like many throughout the pandemic, COVID-19 also redirected my after-graduation plans. It **opened my eyes to applying to graduate school** and connected me with people I would not have connected with if I was not at home.”

“

I decided to go back to school and get out of critical care nursing. COVID made me want to go back to school so I would have **more options in the future.**”

“

COVID has opened my eyes to more opportunity. I previously was dead set on going into industry and working for the rest of my life in design. But now, I am thinking about pursuing a PhD and I really want to start a business of my own.”

The Impact of COVID-19

Insight from Students, in Their Own Words

For Other Students, the Pandemic Delayed—or Derailed—Their Education Plans

While COVID-19 accelerated some students' graduate education plans, for others, the pandemic was detrimental to their ability to pursue or complete their education. These students said changes in work or family responsibilities, financial hardship, illness, inability to travel, and increased stress negatively impacted their ability to explore or enroll in a graduate program.

Should these students resume their search for a graduate program, institutions must be prepared to meet their needs. As the quotes below exemplify, institutions will need to offer robust financial, mental health, career, and academic support services to meet the needs of their future adult learners.

COVID-19 as a Barrier to Students' Graduate Education

Free Response on the Impact of COVID-19

“

Increase demands at work and home (children enrolled in virtual learning) significantly **decreased the amount of time I could devote to my education program.**”

“

COVID just made life more difficult. I don't want to add anything else to my plate at this time.”

“

The second wave of COVID took the life of a family member, which completely disturbed my plans. Even after receiving admissions offers, I am unable to enroll because **my family is financially and emotionally devastated.**”

“

COVID-19 has negatively impacted my **financial stability, housing security, and mental health.**”



Recruit and Support Students from Underserved Groups

LESSON

1

COVID Disproportionately Impacted Students of Color

Students of Color Most Often Said the Pandemic Altered Their Education Plans

The pandemic's impact was especially acute for students of color. More than half of Asian students surveyed said the pandemic impacted their education plans. African, African American, and Black students were also unequally impacted by the pandemic, with 45 percent of students in this group indicating COVID-19 affected their plans to pursue graduate education.

Recent enrollment declines at institutions that predominantly serve students of color reflect the disproportionate impact of COVID-19 on this student group. In some cases, Historically Black Colleges and Universities, Minority Serving Institutions, and Tribal Colleges and Universities experienced enrollment declines that far outpaced declines at predominantly white institutions in 2020-21.¹

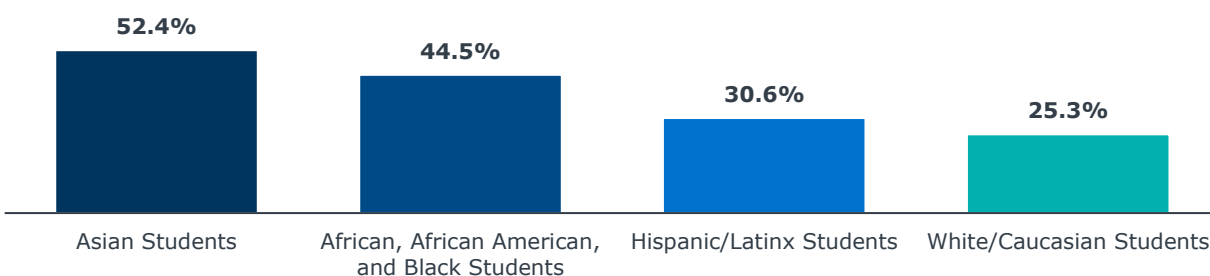
Deepening Divides

"We can see already that many of [COVID-19's] impacts are falling disproportionately on students who went into the pandemic with the greatest educational needs and fewest opportunities—many of them from historically marginalized and underserved groups."

- Suzanne B. Goldberg, US Department of Education

Figure 1: Asian and African, African American, and Black Students Most Often Report COVID-19 Impacted Their Plans

Q: "Has the COVID-19 pandemic affected your education plans?"



International Students Report Outsize Barriers to Enrollment During COVID-19

In addition to students of color, nearly 60 percent of international students who planned to pursue graduate studies in the United States said the pandemic changed their education plans, compared to 28 percent of their domestic counterparts. International students not only faced the obstacles domestic students experienced during the pandemic, but also international travel restrictions, challenges obtaining a visa, and difficulties completing admissions requirements such as the Test of English as a Foreign Language (TOEFL). In total, the Council of Graduate Schools estimates enrollment in graduate programs among first-time international students declined 39 percent from fall 2019 to fall 2020.

The Pandemic Changed the Course of International Students' Plans

"I initially had admission to a master's program in the US, but unfortunately, COVID-19 led to the closure of my country's borders for over 7 months. By the time the borders were opened, classes had already begun and I couldn't enroll."

- Survey Participant

1) Enrollment declines are inclusive of all levels of postsecondary education.

Source: US Department of Education Office of Civil Rights, "Education In a Pandemic: The Disparate Impacts of COVID-19 on America's Students," June 2021; Redden, Elizabeth, "A Pandemic Graduate Admission Cycle," *Insight Higher Ed*, February 2021; EAB research and analysis.

Expanding Class Diversity Serves All Students

Students Seek Class Diversity When Selecting Graduate Programs

Attention to [closing equity gaps at the undergraduate level](#) is growing, but efforts to erase equity gaps for graduate students continue to lag behind. This may change as equity becomes more central to institutional mission and strategic plans—and as students continue to prioritize class diversity when selecting a graduate program.

For additional resources on advancing diversity, equity, and inclusion at your institution, please visit our [DEI Resource Center](#).

Survey respondents identified a “diverse student body” as among the most important factors they consider when making an enrollment decision. Prospective adult learners also placed more emphasis on a “diverse student body” in this year’s survey than they have in years past. This may be due, in part, to the more prominent role racial justice assumed in the national discourse in 2020.

As leaders of adult-serving programs across the country acknowledge, recruiting students from underserved groups is just one part of the work to erase equity gaps. Institutions must also evaluate campus climate, admissions policies, academic practices, and student support services and act to close equity gaps in these areas.

Figure 2: “In terms of your enrollment decision, please indicate the importance of the following factors.”

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

Year	Mean
2021	3.24
2019/2020*	3.06
2018	3.06

Survey respondents identify “class diversity” as more important in their enrollment decisions this year than in years past

*Our researchers paired 2019 survey results with insights about the COVID-19 pandemic in a research report published in 2020.

Strategy Recommendations: *Expanding Class Diversity*

▶ Take a Holistic Approach to Admissions

Inequities in the opportunity to prepare for and succeed on graduate admissions tests has historically led students from underserved groups to underperform on admissions tests as compared to their peers. Assuming a more [holistic approach to admissions decisions](#), and requiring only components of the application that are necessary to evaluating a student’s ability to succeed in the program, is key.

▶ Offer Incentives to Priority Applicants

Providing incentives for applying early will lead prospects who may not have considered your institution to take another look. While incentives should be evaluated on a program-by-program basis, potential incentives include additional scholarship opportunities or a faster admissions decision. When making financial aid decisions, consider behavior patterns from previous enrollment cycles to understand how to best optimize limited financial aid dollars.

Source: EAB research and analysis.

Effective Pricing Strategy Supports Your DEI Efforts

Program Cost Continues to Be the Primary Barrier to Enrollment

Developing a thoughtful pricing strategy is especially important in light of the pandemic's economic impacts. As in years past, cost most often deters students from applying to or enrolling in graduate programs. Nearly half of surveyed students who do not plan to pursue graduate education immediately said that more affordable tuition would motivate them to go back to school. Additionally, 32 percent of surveyed students identified "high cost of attendance" as their primary barrier to enrollment.

47.7%

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

Our researchers expect program cost to continue to be the top barrier to enrollment for future generations of adult learners. EAB's 2020 [survey](#) of Generation Z students indicates that cost is the greatest source of anxiety for these students, suggesting future adult learners will also prioritize program affordability when selecting a graduate program. Cost of attendance is also frequently a source of confusion for many students, as many university websites do not prominently advertise price or do not share information about cost clearly. While some schools' enrollment growth potential is limited by their high price, many more are impacted when prospects misunderstand their price.

Students from Underserved Groups Most Often Identify Cost as Prohibitive

Although students across the board cited program cost as the top barrier to enrollment, African, African American, and Black students and international students disproportionately shared that program cost is the top reason they cannot or will not pursue graduate education. For example, almost half of African, African American, and Black students surveyed said the "high cost of attendance" is their primary barrier to enrollment, compared to 28 percent of white students, 19 percent of Asian students, and 7 percent of Hispanic/Latinx students. Additionally, African, African American, and Black students more often identified [fees](#) as a barrier to enrollment.

Strategy Recommendations: Pricing Graduate, Online, and Adult Education Programs



Focus Early Messaging on Affordability

Many adult learners only consider programs within their budget. Ensure pricing information is clear and available up front.



Demonstrate ROI

Provide data that demonstrates your degree is worth the cost. Pair data about earning power and outcomes with program cost information to communicate return on education.



Set Price Based on the Market for That Particular Credential

Programs should be priced relative to the competitive market for that credential. Because earning potential can vary by credential, the price students will be willing to pay often differs by program.



Advertise Tuition and Discount Information Up Front

Surveyed students often apply to just a couple of institutions, so ensure tuition, fees, and net cost information (i.e., the total a student will pay) as well as discount information is readily available prior to application.

Source: EAB research and analysis.

Robust Support Services Increase Appeal and Retention

Respondents Prioritize Student Support Services When Making Enrollment Decisions

As leaders of adult-serving programs know well, graduate students are often less connected to campus life—and therefore, to student support services—than traditional undergraduate students. More so than in previous years’ surveys, respondents identified “online support services” and “student support services” as highly important in their enrollment decisions. Ensure your program webpages and other marketing materials reference the resources available to students, including financial aid, career advising, academic support, and student health and counseling services.

Promote Student Support Services

Sample EAB nurture email



Unparalleled Support. Unparalleled Success.

At _____, your success is our goal, and we offer the support to prove it. As soon as you submit your application, you will have dedicated support from a personal admissions representative who will assist you with everything from obtaining transcripts to choosing the right classes. As experts on curriculum, programs, and processes, our representatives will ensure that you reach graduation quickly and on track to achieve your goals.

Apply today and move forward in your career with confidence.

Apply Now

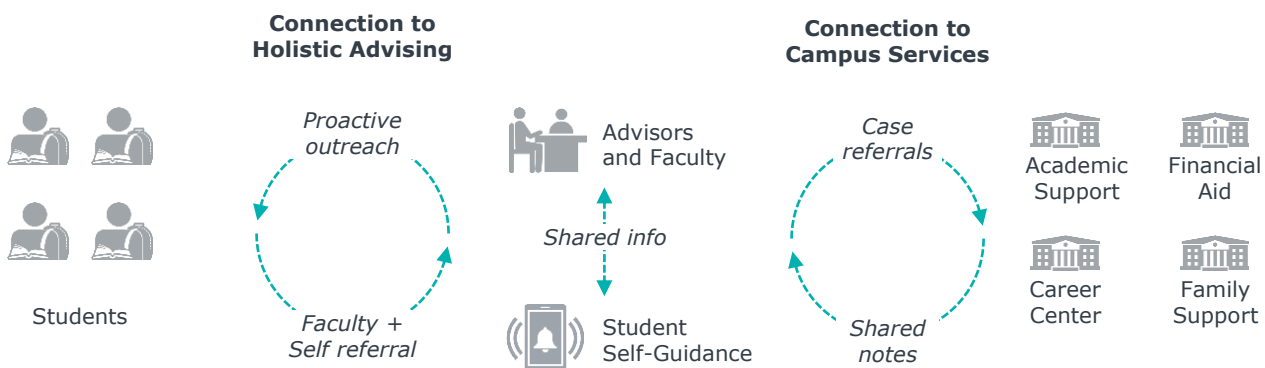
Figure 3: “In terms of your enrollment decision, please indicate the importance of the following factors.”

Top Criteria	Mean
Online support services	3.70
Length of program/Time required for degree completion	3.69
Full-time program	3.68
Student support services	3.49

Support services were classified as “very important” to graduate students in their enrollment decisions

Strategy Recommendation: Connecting Graduate Students to Support Services

Institutions may benefit from establishing a [coordinated care network](#) designed to help advisors and faculty connect with graduate students proactively. Students balancing school with work and family commitments also frequently seek self-service technologies to access resources.



Source: EAB research and analysis.



Online Learning Continues to Gain Popularity

LESSON

2

The Online Graduate Market Is Growing

Even Before COVID-19, Students' Interest in Online Programs Was Growing

Online enrollments account for a large and growing slice of the master's and professional doctorate markets. Enrollment in online graduate programs increased by about 7 percent annually on average from 2014 to 2019. By contrast, enrollment in on-ground graduate programs declined about 2 percent annually.

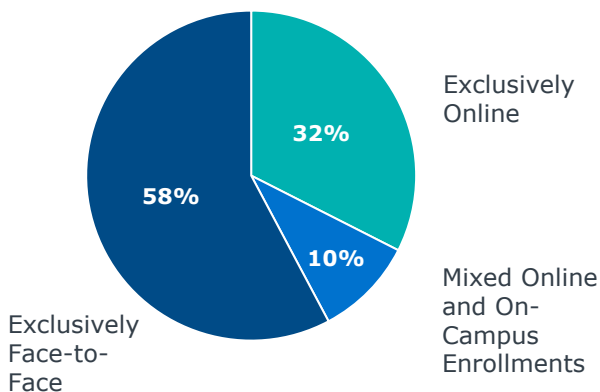
39.2%

of survey respondents said they are considering online programs

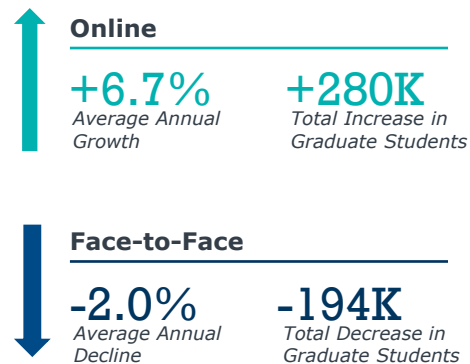
While online graduate enrollment is growing, our survey indicates student interest in online programs remains sharply divided. About 40 percent of surveyed students indicated they are considering online programs, while 43 percent said they are not interested in online learning. Online programs are neither a right fit for all students nor a silver bullet for institutions looking to grow graduate enrollment. However, results of this survey suggest the pandemic may be a turning point in students' perceptions of online graduate education.

Figure 4: Online Enrollment Represents a Fast-Growing Share of the Graduate Market

Graduate Enrollments by Modality, Fall 2019²



5-Year Growth Trends, 2014-2019



The Pandemic Improved Some Adult Learners' Perception of Online Learning

Despite enrollment leaders' trepidations that emergency remote instruction may negatively impact students' perceptions of online learning, 46 percent of surveyed students said they are more likely to consider online programs as a result of experiences during COVID-19. Nearly 60 percent of surveyed students who participated in online learning during the pandemic said online learning was a positive experience.

COVID-19 Encouraged Some but Not All Adult Learners to Pursue Online Learning

Free Responses on the Impact of COVID-19

"COVID-19 made me more willing to complete online school and pushed me to enroll in an online MBA."

"I will be getting my master's online now. COVID has shown me how to do that."

"After experiencing online learning...I decided to choose a graduate school that was definitely going to be in-person."

2) Recorded as "Distance Education" in IPEDS data.

Source: EAB analysis of distance enrollment data from IPEDS Fall Enrollment Surveys 2013-18; EAB research and analysis.

Understanding Your Future Online Student

Tailor Online Programs to the Students Most Likely to Pursue Online Options

Growing student interest in online learning underscores the need for a comprehensive understanding of the students most likely to pursue online programs—and a robust strategy to nurture them to enrollment. Our survey data shows generational differences in students’ openness to online learning persisted this year. Students 26 and over, and especially students 35 and over, most often said they are considering online options. Tailor marketing messages for online programs to appeal to these students, as well as students who identify as female and who work full-time.

Figure 5: The Students Most Likely to Express Interest in Online Learning

Characteristics of respondents who most often said they are considering online programs

▶ Aged 26 and Over

Nearly 40 percent of students 26 to 35 expressed interest in online programs. Students 35 and over are even more likely to express interest in online programs (i.e., 60 percent of students surveyed). However, just one-quarter of students under age 26 indicated interest in online programs.

▶ Identify as Female

Forty-two percent of survey respondents who identify as female said they are considering online programs. By contrast, only 36 percent of students who identify as male indicated interest in online programs. The outside [socioeconomic impacts of COVID-19](#) (e.g., increased child and elderly care responsibilities) on individuals who identify as female may make the flexibility of online learning more appealing to this audience.

▶ Work Full-Time

More than half of students who work full-time said they are considering online programs. Fewer than 30 percent of students who maintain part-time employment or who are not currently employed reported interest in online options.

Offer—and Prominently Advertise—Online Support Services to Assuage Student Concerns

As noted, “online student support services” is increasingly important to prospective students when evaluating graduate programs. To best support your future online student, ensure you have a comprehensive suite of support services readily available to online students. Advertise these resources prominently in marketing materials and on your program webpages to assuage students’ concerns about online learning.

Strategy Recommendations: Supporting Online Students



Routinize the Basics

Build knowledge base of FAQs for self-help and aggregate important links and resources in one place



Move Beyond the Phone

Use live chat for speedier troubleshooting and to use the communication methods students most often prefer



Lower the Cost of 24/7

Employ students for late-night, off-site shifts using live chat



Achieve Scale

Use existing LMS partnerships to outsource staff or time-intensive service provision

Source: EAB research and analysis.



Your Future Adult Learner Is Increasingly Difficult to Find

LESSON

3

Test-Taker Lists Remain an Incomplete Source of Students

The Number of Students Taking Admissions Tests Continues to Dwindle

When institutions relaxed or eliminated test score requirements during the pandemic, conversations about the value of such tests permeated both higher ed and the news media. For students, our research indicates changes to test score requirements were a welcome benefit of the pandemic.

29.4%

of survey respondents said they do not plan to take a graduate admissions test

Twenty-nine percent of surveyed students said they do not plan to take a graduate admissions test, as compared to just 10 percent of students surveyed last year. Students also identify a lack of test requirements as more important in their enrollment decisions this year than they did last year. While the widespread elimination of test score requirements may not outlast the pandemic, institutions should continue to consider whether graduate admissions tests are a useful metric during the admissions process—and worth potentially alienating students for whom test scores are a barrier to application.

”

Lack of Test Score Requirements During COVID-19 Opens Doors for Students

Free Responses on the Impact of COVID-19

“My program waiving the application fee and GRE requirement is what interested me in applying.”

“COVID caused the elimination of the GRE requirement...For all the bad, COVID created equity in the graduate school application process.”

“Because the GRE and other requirements were waived, it was much easier for me to apply.”

Supplement Test-Taker Lists with Students Identified from a Range of Sources

As the number of students taking graduate admissions tests continues to decline, enrollment leaders will need to expand the sources they use to identify prospective students. Consult the list below to ensure you are including a range of sources in your audience generation strategy. Additionally, consider opportunities to pilot new sources of prospective adult learners.

Strategy Recommendation: *Finding Right-Fit Prospects*

Include students from the following sources in your recruitment marketing campaigns:



Your institution's inquiry pool



Consumer databases



Young alumni and current undergraduates



Test-taker lists



First-party digital targeting



Cappex for Adult Learners

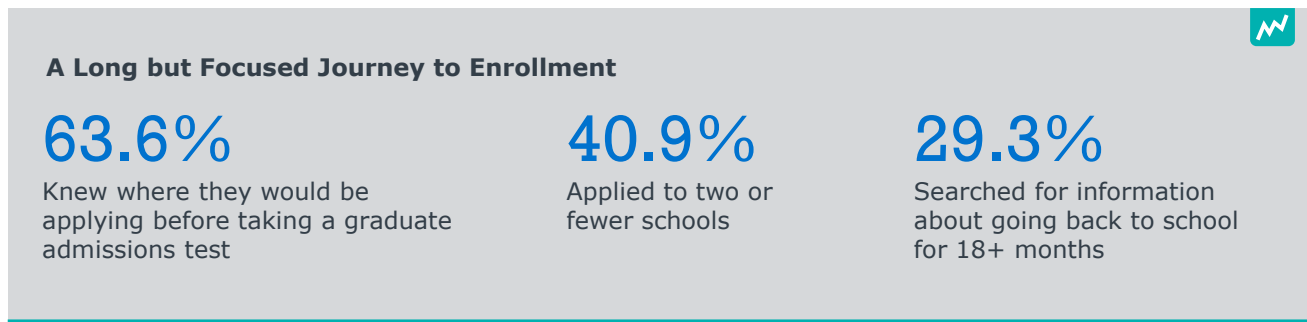
Source: EAB research and analysis.

Adult Learners Spend Time Researching, Not Applying

Adult Learners Continue to Approach the Search Process Pragmatically

Our 2021 survey reaffirms the pragmatic approach adult learners take to the search and application processes. About 41 percent of survey respondents applied to two or fewer institutions. Respondents 26 and older and students who maintain full- or part-time employment are especially likely to have applied to two or fewer schools.

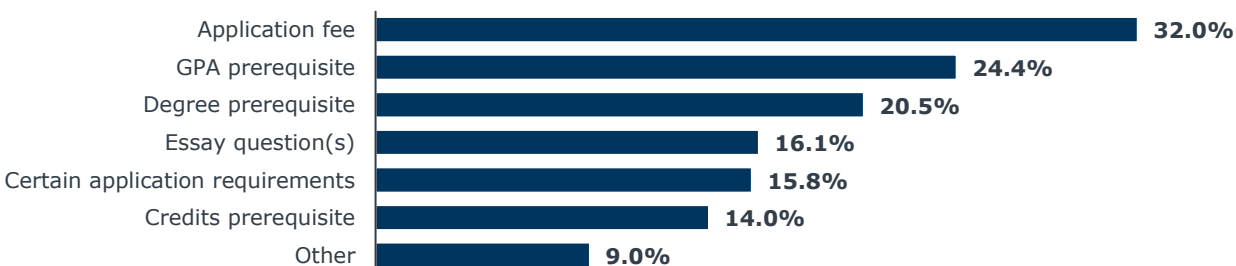
The journey to enrollment continues to be long for many adult learners. One in three surveyed students said they have researched graduate programs for more than 18 months. Students aged 26 and older, and especially students 35 and older, are especially likely to research programs for at least one year. This lengthy journey to enrollment suggests that institutions should continue outreach to students who have not engaged with recruitment marketing in months or even years.



Application and Admissions Requirements Deter Students from Taking the Next Step

Enrollment leaders should regularly evaluate if stated application requirements are useful in the admissions process or may be unnecessarily narrowing their prospect pool. More so than in previous years, our survey data indicates adult learners are opting not to apply to a specific school or program because of an application or admissions requirement. Students of color and students 35 and over most often said that an application or admissions requirement deterred them from enrolling, further suggesting that application prerequisites may hurt efforts to recruit and serve students from underserved populations.

Figure 6: "Select any/all application or application requirements that influenced your decision *not* to apply to a specific school or program."



Source: EAB research and analysis.

Don't Overlook .edu as a Powerful Recruitment Tool

Your Website Provides the First Impression of Your Institution

The adult learner journey to enrollment continues to be dominated by self-shopping, much of which occurs on university websites. Fifty-seven percent of survey respondents said they used specific school websites when researching programs, followed by graduate program search sites (55 percent) and web searches (50 percent).

Students who turn to university websites when researching graduate programs report that their experience with a university website impacts their opinion of that institution. For that reason, it is important that university websites are easily navigable, visually appealing, and include the information students seek clearly and prominently.

Our survey indicates prospective adult learners most often use university websites to find information about programs offered, admissions requirements and processes, and costs. Ensure admissions and financial information is readily available not only on university webpages (e.g., a dedicated financial aid page) but also on program landing pages.

...And Can Make or Break a Student's Decision to Apply

Participants who used specific college websites for research

89.9%

Say a well-designed website will improve their opinion of a school

84.9%

Say a poorly designed website will negatively affect their opinion of a school

63.3%

Will abandon school websites that are not user-friendly

Strategy Recommendation: *Optimizing Your Website for Prospective Adult Learners*



Prioritize Search Engine Optimization and Site Hygiene

Use keyword-rich introductory copy, deliberate site dominance strategies, and headers and meta tags to drive traffic to and across your webpages.



Deploy Highly Engaging Content with Prospective Students' Intent in Mind

Where possible, ensure content on your .edu is fully immersive, interactive, and focused on the student. Content should also be optimized for the growing number of students who research academic programs on mobile devices.



Use Inquiry-Generating Features and Audience Insights to Boost Conversion

Generate inquiries from your .edu page through clear calls to action with predictive next steps based on user behavior. Use audience insights to enable your team to customize content based on student interest and behaviors.

Research Methodology

Overview

EAB's Adult Learner Recruitment division conducted a survey of current and prospective adult learners in summer 2021 to learn more about their enrollment motivations, preferences, concerns, and the impact of the COVID-19 pandemic on their education plans. The reported results include responses from 2,234 participants. In addition to the survey data, these findings reflect the insights from EAB research based on our partnership with 150+ graduate, professional, online, and adult-serving programs.

Participant Profile

Gender	Percentage
Female	56.6%
Male	41.8%
Prefer to self-describe	0.5%
Non-binary	1.1%

Age	Percentage
25 and under	37.9%
26-40	37.5%
41 and over	24.6%

Region	Percentage
Northeast	20.5%
Southeast	19.0%
Midwest	17.2%
Southwest	11.9%
West	9.5%
Outside the US	21.8%

Ethnicity	Percentage
African/African American/Black	23.6%
Asian (Central/South/East/Southeast)	13.8%
Hawaiian Native/Pacific Islander	0.3%
Hispanic or Latinx	8.3%
Middle Easterner/West Asian	3.6%
Native American	2.3%
White/Caucasian	53.9%
Other	0.8%

Employment	Percentage
Employed full-time	52.5%
Employed part-time	19.4%
Not employed	28.1%

Education

- In terms of highest level of education completed, 4.7% had completed high school, 2.7% had completed some college, 1.6% had completed an associate degree, 32.8% had completed a bachelor's degree, 11.7% had completed some graduate studies, 35.3% had completed a master's degree, 8.0% had completed a doctoral degree, and 3.2% had completed some other professional credential.
- In terms of plans to pursue education further, 25.8% were either considering enrolling or planning to enroll in a program, 50.1% were currently enrolled in a program, 3.0% were enrolled at one time but were no longer enrolled, and 10.1% did not plan to continue their education.
- The participants who planned to enroll or were currently enrolled were considering or pursuing the following degrees and programs:

Other master's degree (e.g., MA, MS, MFA): 39.8%
Doctorate (e.g., PhD, EdD): 35.2%
Bachelor's degree: 8.5%
Law (e.g., MA, JD, LLM): 0.8%
Joint bachelor's/master's degree (e.g., 5-year program): 1.7%

Certificate: 2.4%
Master's of Business Administration (MBA): 4.3%
Medicine (e.g., MD, DDS, DPT): 2.9%
Other: 1.1%

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