Adult Learner Recruitment
Technology-Enabled Services Focused on Achieving Outsized Program Growth
Start with best practices research

- Research Forums for presidents, provosts, chief business officers, and key academic and administrative leaders
- At the core of all we do
- Peer-tested best practices research
- Answers to the most pressing issues

Then hardwire those insights into your organization using our technology & services

Enrollment Management

Our Royall & Company division provides data-driven undergraduate and graduate solutions that target qualified prospective students; build relationships throughout the search, application, and yield process; and optimize financial aid resources.

Student Success

Members, including four- and two-year institutions, use the Student Success Collaborative combination of analytics, interaction and workflow technology, and consulting to support, retain and graduate more students.

Growth and Academic Operations

Our Academic Performance Solutions group partners with university academic and business leaders to help make smart resource trade-offs, improve academic efficiency, and grow academic program revenues.

1,100+
College and university members

10,000+
Research interviews per year

475M+
Course records in our student success analytic platform

1.2B+
Student interactions annually
Adults and Working Professionals Fuel the Higher Education Enterprise

Graduate and Certificate Programs Outpacing Undergraduate Programs in Growth and Revenue

First, the Good News

Adult Learners Key to Sustaining Enrollment Growth

Growing Consumer Interest

- Projected increase in the enrollment of students aged 25 to 34 from 2016 to 2022

Superior Growth Profile

- Projected Master’s enrollment growth compared to Bachelor’s growth through 2022

Credentials on the Rise

- Greater enrollment growth in certificate programs compared to Master’s programs

Growth Expectations Soaring at Most Universities

- Increased growth goals for COE programs across the last several years

If we are going to hit our enrollment growth targets, we can no longer focus entirely on the high school market. Our campus is starting to embrace the fact that growth is likely going to come in the graduate and online markets.

Market Saturation Across Many Degree Programs Leaves Many Deans Spending More to Get Less

Now for the Bad News

Competition for Students is Intensifying and Upending Status Quo

Growth of Graduate Offerings Outpacing Student Demand

Comparison in Growth of Graduate Online Programs vs. Degree Conferrals, 2012-2022

<table>
<thead>
<tr>
<th></th>
<th>MBA</th>
<th>MPA</th>
<th>MPH</th>
<th>MSW</th>
<th>MSN</th>
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</thead>
<tbody>
<tr>
<td>Conferrals</td>
<td>3%</td>
<td>26%</td>
<td>39%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Online Programs</td>
<td>49%</td>
<td>37%</td>
<td>50%</td>
<td>37%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Recent Program Launches

- **650** Institutions added new master’s programs in 2012
- **+1,700** New master’s programs introduced in 2012

Explosive Program Growth Wrecking Havoc on Recruiting Expenses

226% Increased cost per click for graduate programs from 2009-2014, as high as $88 for “RN to BSN Online” and $69 for “Online MBA”

Escalating Cost to Recruit Undermines Revenue Gains

We’re getting eaten alive on our ad spend. **Not only are the costs increasing due to more competition, but it’s easy to spend a lot of money in the wrong places and we aren’t getting the same returns.** The costs creeped up over time and I can’t believe what we’re spending now—it’s become cost-prohibitive.

Marketing Innovation “Explosion” Also Upsetting Recruiting Norms

Increasing Channels and Varied Utilization Across Prospects Pose Investment Conundrums

Hyper-Connected but Less Reachable than Ever

Channel Proliferation Dilutes the Effectiveness of Any One

Running Faster to Keep in Pace: Multi-Channel Marketing

Like “Throwing Spaghetti at a Wall”

Analytics    Influencer outreach
Affiliates    LinkedIn advertising
Billboards    LinkedIn group
Blogging      Loyalty program
Call center   Magazine ads
Catalog       Microsites
Digital banners Mobile
Email         Newspaper ads
Employer partnerships Paid leads
Events        Pay per click
Facebook advertising Press releases
Gamification  QR codes
Infographics  Radio ads
Influencer outreach
Referral incentives

Digital Lifestyles Demand the Right Message at the Right Time

Digital lifestyles deplete the ability to remain focused on a single task... Multi-screening trains consumers to be less effective at filtering out distractions—they are increasingly hungry for something new. This means more opportunity to hijack attention but also that brands need to work harder to maintain it.

Alyson Gausby
Consumer Insights Lead, Microsoft

Increased Self-Shopping Challenges Prospect Identification and Service

Rise in Stealth Applications Increases Urgency for Web Experiences to Support Self-Service

**Stealth Now the Norm**

Increased Self-Shopping Challenges Prospect Identification and Service

**The New Reality**

**Increased Self-Shopping Challenges Prospect Identification and Service**

Rise in Stealth Applications Increases Urgency for Web Experiences to Support Self-Service

**Stealth Now the Norm**

**40%** five years ago

**70%** today

Stealth prospects as a percentage of total applicant pool

**72%** of prospects visit the institutional website for at least two weeks before acting

**25%** of prospects never look to sources outside the web

**80%** of education search queries end without conversion

**Changing Adult-Learner Approaches to Search**

**Traditional High-Touch Recruiting**

Request information  Speak to recruiter  Attend info session  Submit application  Register for first term

**Today’s Stealth Prospects**

Independently browse  Start application  Submit application  Register for first term

Unable to find preferred course  Concerned about financing degree

**Challenges for Institutions**

**New Enrollment Challenges in the Era of Stealth**

**Understanding Adult-Aged Students**

What attracts prospects to my institution?

**Improving Market Performance**

How do I improve performance in a market I don’t understand?

**Supporting Self-Service**

How do I drive self-shoppers to action?

Source: Compete, Inc. U.S. Custom Education H2011; EAB Interviews and Analysis.
Place Matters Online Too

Online Students Still Local

Online Student Distance from Institution, 2017¹

- 54% within 0-50 Miles
- 18% within 51-100 Miles
- 20% within 101+ Miles

Access to In-Person Services Valued

- 75% of students visited campus or a campus center at least once during program

Sudden Generational Shift Unlikely

- 83% prefer face-to-face connection—despite sending 100 texts per day.

Online Leader Pivots Marketing Spend Back Home

<table>
<thead>
<tr>
<th>University of Florida</th>
<th>FY 2016</th>
<th>FY 2017</th>
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<tbody>
<tr>
<td>Proportion of Online Marketing Budget Spent In- vs. Out-of-State</td>
<td>30% In-State</td>
<td>70% Out-of-State</td>
</tr>
<tr>
<td></td>
<td>80% In-State</td>
<td>20% Out-of-State</td>
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</table>

Ambition Leads to Outsized Expectations

- Nontraditional Audiences Smaller Than They First Appear

Workers Facing Automation
- Automation progressing slowly
- Mostly affecting workers who will retrain at community colleges

Military
- Small proportion uses GI benefits
- Access and interest varies by branch

Degree Completers
- Farther from degree than expected
- Facing obstacles to completion that interrupted progress before

International
- Competition in country of origin
- Internet access for online students
- Visa eligibility for F2F

Expected size of audience

- Source: EAB analysis of sources available upon request.

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Online Degree Completion: No Magic Bullets

The Hype

31M
Size of degree completion market (some college, no degree) often cited—used in vendor sales pitches, strategic plans.

<table>
<thead>
<tr>
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<th>The Reality of “Potential Completers”</th>
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<tbody>
<tr>
<td>4M</td>
<td>Potential completers (multiple term enrollees with 2 years’ progress or more)</td>
</tr>
<tr>
<td></td>
<td>One-term enrollees</td>
</tr>
<tr>
<td></td>
<td>Multiple-term enrollees with less than 2 years’ progress</td>
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</tbody>
</table>

Getting Beyond “Working Professionals”

- Complex Motivations and Inflection Points Across Career Lifecycles

### Audience

- **Upskilling in Place**
  - “I need new skills to keep up with job expectations.”
- **Seeking Promotion**
  - “I need to build new skills for my next step.”
- **Facing Replacement**
  - “My career doesn’t exist anymore.”
- **Returning to Workforce**
  - “I haven’t worked in a long time.”
- **Preparing for a Switch**
  - “I want a better job.”
- **Pursuing a Passion**
  - “I’m looking for a career with meaning.”

### Customer Journey

- **Value Added by Education**
  - Value is typically from skills learned quickly (not credential’s authority).
  - Skills often outweigh credential, except in industries with prescribed career ladders.
  - New skills offer greatest benefit, but may require credential to change industry.
  - Credential communicates readiness for today’s job, and updated skills ensure performance.
  - Credential signals preparation, but fields (e.g., tech) may seek primarily skill growth.
  - Skills learned for new role matter most, if entry level degree requirements are met.

- **Goal**
  - Keep up
  - Advance
  - Secure a new job

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“Keep up” = Require intervention to recognize educational need.
- Inform about job options.
- Explain how to refresh skills.
- Articulate pathways to better jobs.
- Introduce meaningful alternatives.

“Advance” = Inform about job options.
- Explain how to refresh skills.
- Articulate pathways to better jobs.
- Introduce meaningful alternatives.

“Secure a new job” = Articulate pathways to better jobs.
- Introduce meaningful alternatives.

Source: EAB interviews and analysis.
Putting Market Needs at the Center

Getting to “Outside In” Product Design

BEFORE

Product-First Strategy
Key inputs:
- Success stories at other institutions
- Programs already in the portfolio
- Credential macro-trends

Representative questions:
- Should we start offering micro-credentials?
- What short-format, non-traditional credentials do our peers offer?
- How can I find students for our modular programs?

AFTER

Audience-First Strategy
Key inputs:
- Student motivations, career pathways, and market sizing
- Regional labor market data
- Program portfolio performance

Representative Questions
- What is more important to students and employers: the credential or the skills?
- Does this segment realize more education is necessary for advancement?

1. Understanding Adult Student Segments and Motivations
2. Assessing Regional Labor Market Demand
3. Aligning Opportunities with Internal Capabilities

Source: EAB interviews and analysis.
Unrealized Needs

- Students Not Always Looking for Next Educational Step

Unrealized Educational Needs
Audiences require proactive outreach from COE unit to recognize higher education is necessary for their next step.
“Last Mile” of Recruitment Effort Rife with Challenges

Strong Pipeline Building Can Be Compromised by Substandard Follow Through

Enrollment Results from Typical Adult Recruitment Campaigns: Industry Averages
A Robust Pipeline Undermined by Lack of Prospect Follow-Up

EAB’s Targeted Conversion Campaigns Boost Enrollment — and Tuition Revenue
Targeted Prospect Engagement and Applicant Follow-Up Maximizes Prospect Conversion and Applicant Yield

A Partnership that Pays for Itself
Incremental Enrollments and Revenue from Partnering with EAB

3.8x
Increase in enrollment from a same-sized pool of original prospects
Customizing Marketing Campaigns Produces Outsized

A Tale of Two Partners:
Private University in the Northeast

Vendor XYZ

Marketing Strategy: “One Size Fits All”

Every prospect receives same message via same media channels

Marketing Strategy: Customized Campaigns

Prospects assigned to segments, receive different message, media

Drives Higher Prospect Response, Robust ROI
Click-Through Rate, Facebook Ad Campaigns

<table>
<thead>
<tr>
<th>Vendor XYZ</th>
<th>EAB</th>
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<tbody>
<tr>
<td>0.44%</td>
<td>1.74%</td>
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4X increase in CTR over incumbent vendor

37 New Incremental Students within 6 months
Direct-to-Employer Outreach Shapes Program for New Managers

Emerging Leaders Certificate
University of Wisconsin-Milwaukee
School of Continuing Education
$5,500; 8 day-long courses

- Employer survey highlighted manager skills gaps
- Designed for people with <5 years of management experience
- 30 students in open enrollment certificate; considering contract-based program
- Over 90% of students sponsored by employers

“Fast Lane” Option for Motivated Millennials

- All courses offered once a semester for Millennials seeking faster ROI
- Gen X and Boomer students more likely to savor experience

6 Months

2-3 Years

Source: EAB interviews and analysis.
The best practices are the ones that work for you.SM