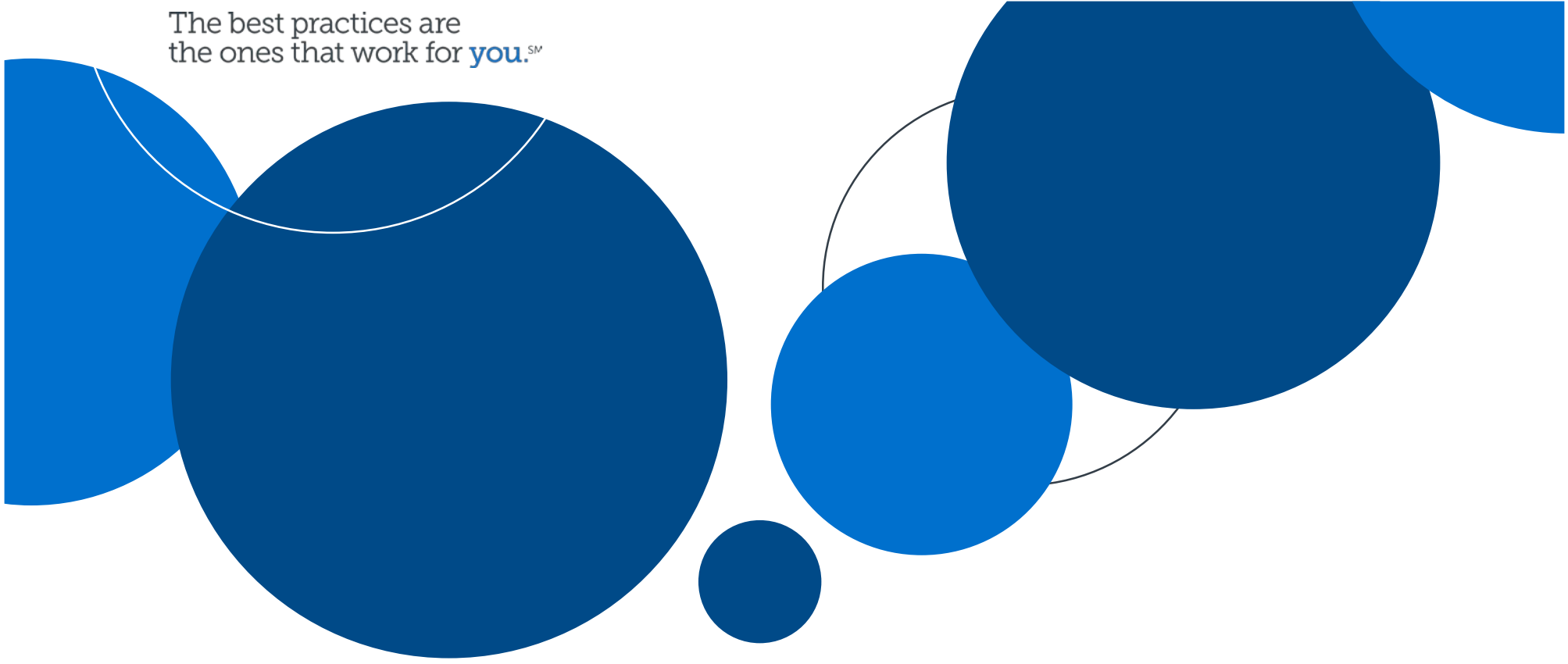


The best practices are  
the ones that work for **you.**<sup>SM</sup>



EAB

Royall & Company

# Adult Learner Recruitment

Technology-Enabled Services Focused on Achieving Outsized Program Growth

▶ **Start with best practices research**

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- › 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**

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### **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<sup>+</sup>**

College and university members

**10,000<sup>+</sup>**

Research interviews per year

**475M<sup>+</sup>**

Course records in our student success analytic platform

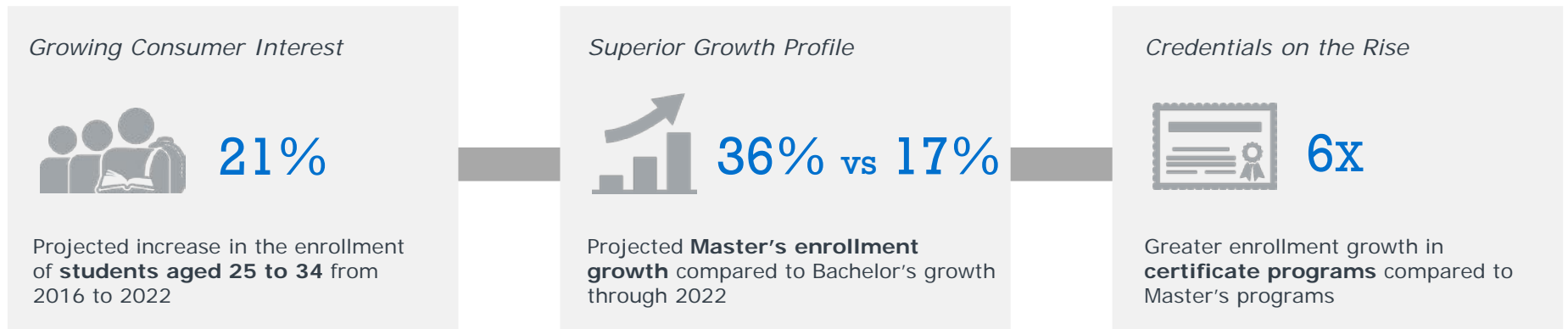
**1.2B<sup>+</sup>**

Student interactions annually

# Adults and Working Professionals Fuel the Higher Education Enterprise

Graduate and Certificate Programs Outpacing Undergraduate Programs in Growth and Revenue

## Adult Learners Key to Sustaining Enrollment Growth



## Growth Expectations Soaring at Most Universities

**10-25%** Increased growth goals for COE programs across the last several years

## University Leaders Mobilizing Behind Adult Learners

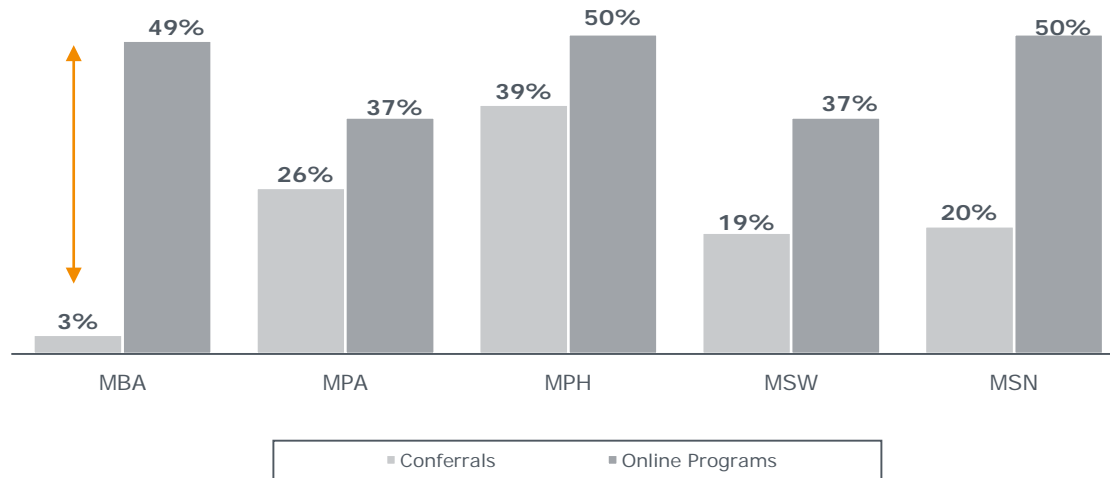
“If we are going to hit our enrollment growth targets, we can no longer focus entirely on the high school market. Our campus is starting to embrace the fact that **growth is likely going to come in the graduate and online markets.**”

# Competition for Students is Intensifying and Upending Status Quo

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

## Growth of Graduate Offerings Outpacing Student Demand

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



**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

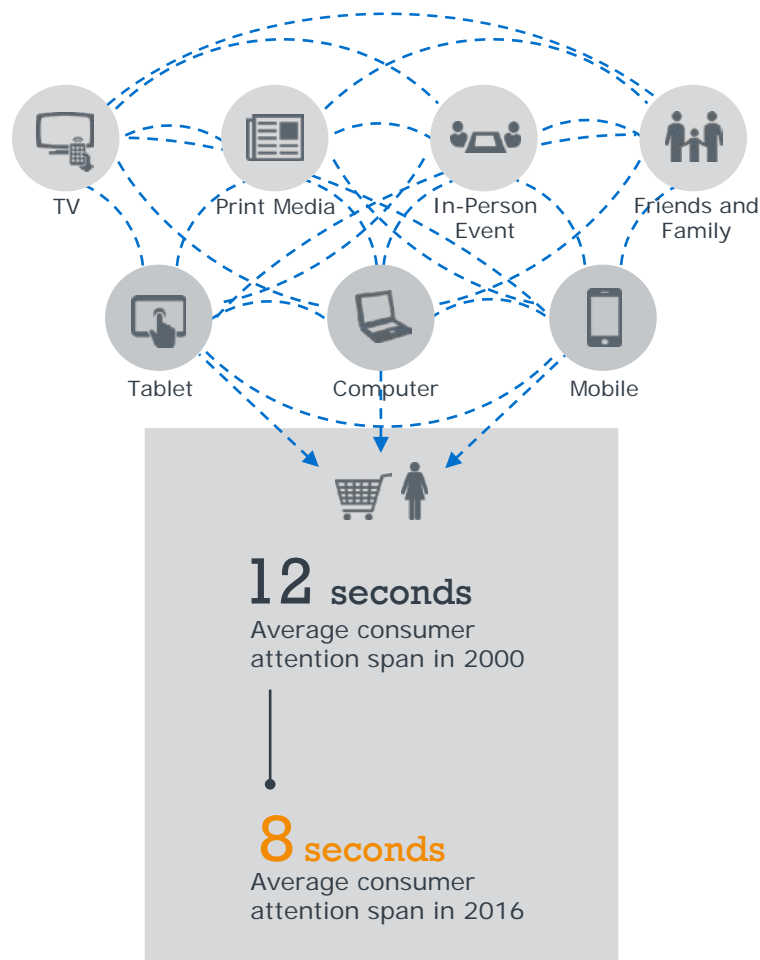
“We’re getting eaten alive on our ad spend. **Not only are the costs increasing due to more competition, but it’s easy to spend a lot of money in the wrong places and we aren’t getting the same returns.** The costs crept up over time and I can’t believe what we’re spending now—it’s become **cost-prohibitive.**”

Source: National Center for Education Statistics, "Projections of Education Statistics to 2022," Feb. 2014, Pearson-Embanet; Keypath Education data, proprietary client list; EAB interviews and analysis

# 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  | Public transportation signage |
| Affiliates            | LinkedIn advertising | Professional associations     |
| Billboards            | LinkedIn group       | Search engine optimization    |
| Blogging              | Loyalty program      | Sentiment analysis            |
| Call center           | Magazine ads         | SMS messaging                 |
| Catalog               | Microsites           | Tablet                        |
| Digital banners       | Mobile               | Television                    |
| Email                 | Newspaper ads        | Twitter                       |
| Employer partnerships | Paid leads           | Videos                        |
| Events                | Pay per click        | Webchat                       |
| Facebook advertising  | Press releases       | YouTube channel...            |
| Gamification          | QR codes             |                               |
| Infographics          | Radio ads            |                               |
|                       | 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**



**40%**  
five years ago



**70%**  
today

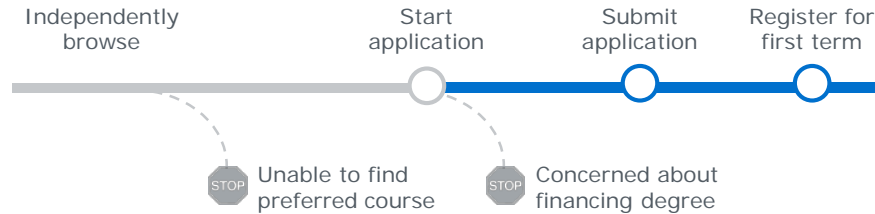
*Stealth prospects as a percentage of total applicant pool*

## Changing Adult-Learner Approaches to Search

### Traditional High-Touch Recruiting



### Today's Stealth Prospects



## Challenges for Institutions

**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**

## 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?

## Place Matters Online Too

### Online Students Still Local

*Online Student Distance from Institution, 2017<sup>1</sup>*

- Eight percent of respondents indicated that they were not sure how far they lived from the closest campus/service center of the college/university in which they enrolled



### Access to In-Person Services Valued

**75%**

Proportion of Students Who Visited Campus or a Campus Center at Least Once During Program

### Sudden Generational Shift Unlikely

**83%**

Percentage of Gen Z preferring face-to-face connection—despite sending 100 texts per day.

### Online Leader Pivots Marketing Spend Back Home



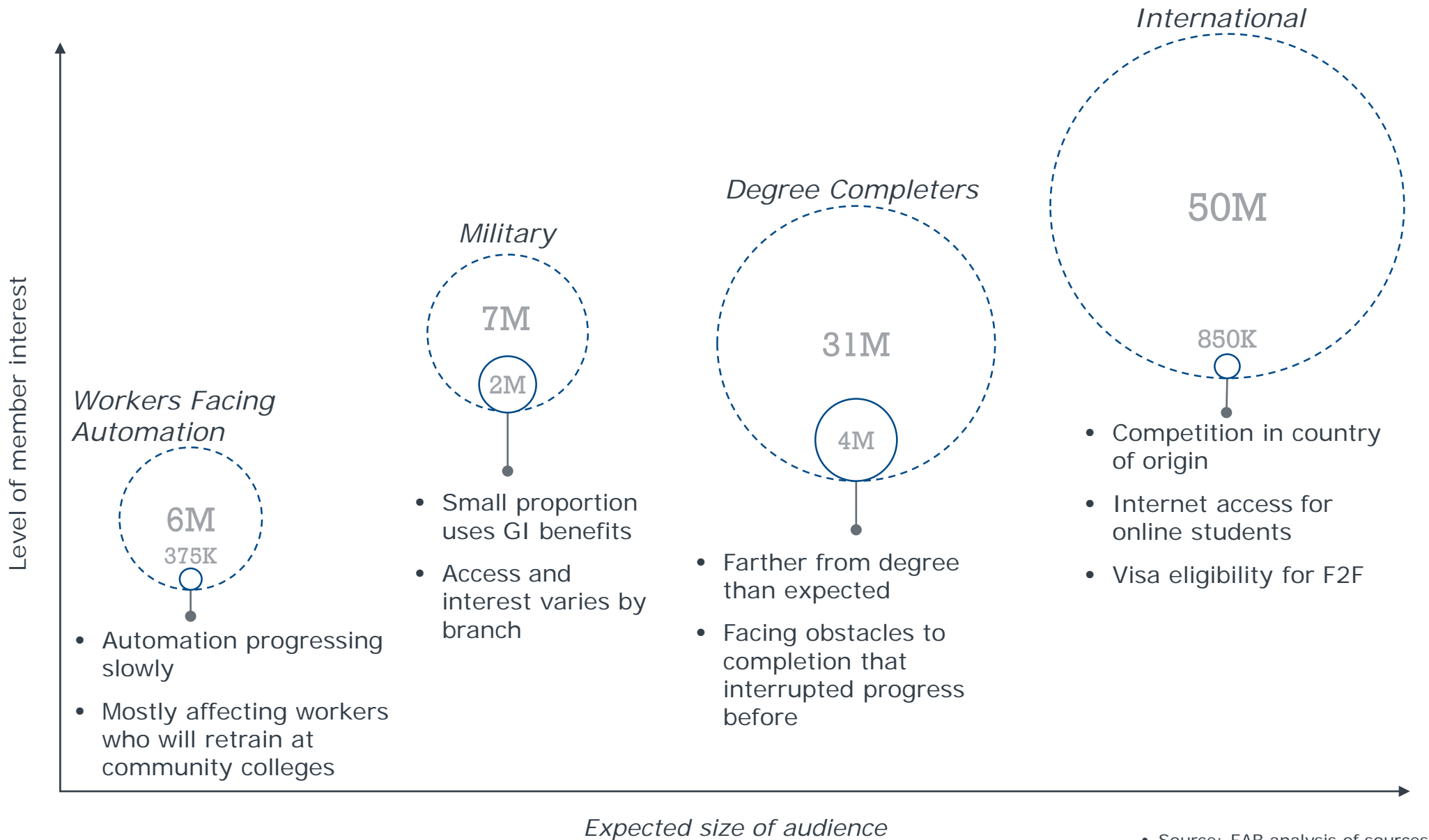
*Proportion of Online Marketing Budget Spent In- vs. Out-of-State*



• Source: "Online College Students 2017," Learning House, 2017, <https://www.learninghouse.com/ocs2017/>; Corey Seemiller and Meghan Grace, *Generation Z goes*

# Ambition Leads to Outsized Expectations

- Nontraditional Audiences Smaller Than They First Appear



- Source: EAB analysis of sources available upon request.



# Online Degree Completion: No Magic Bullets

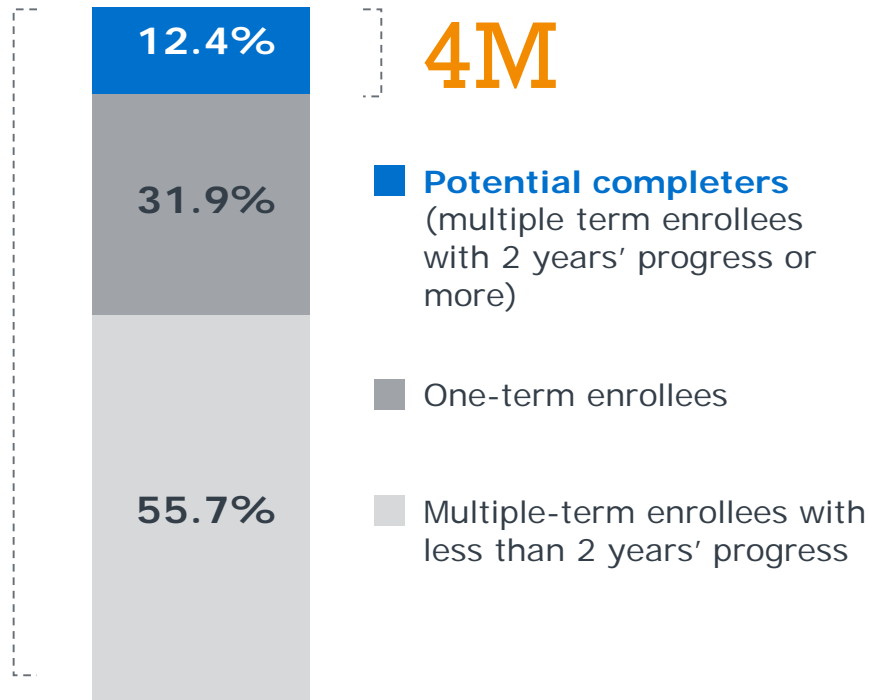
## The Hype

31M

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

## The Reality of “Potential Completers”

4M



NATIONAL STUDENT CLEARINGHOUSE

## High Barriers to Entry

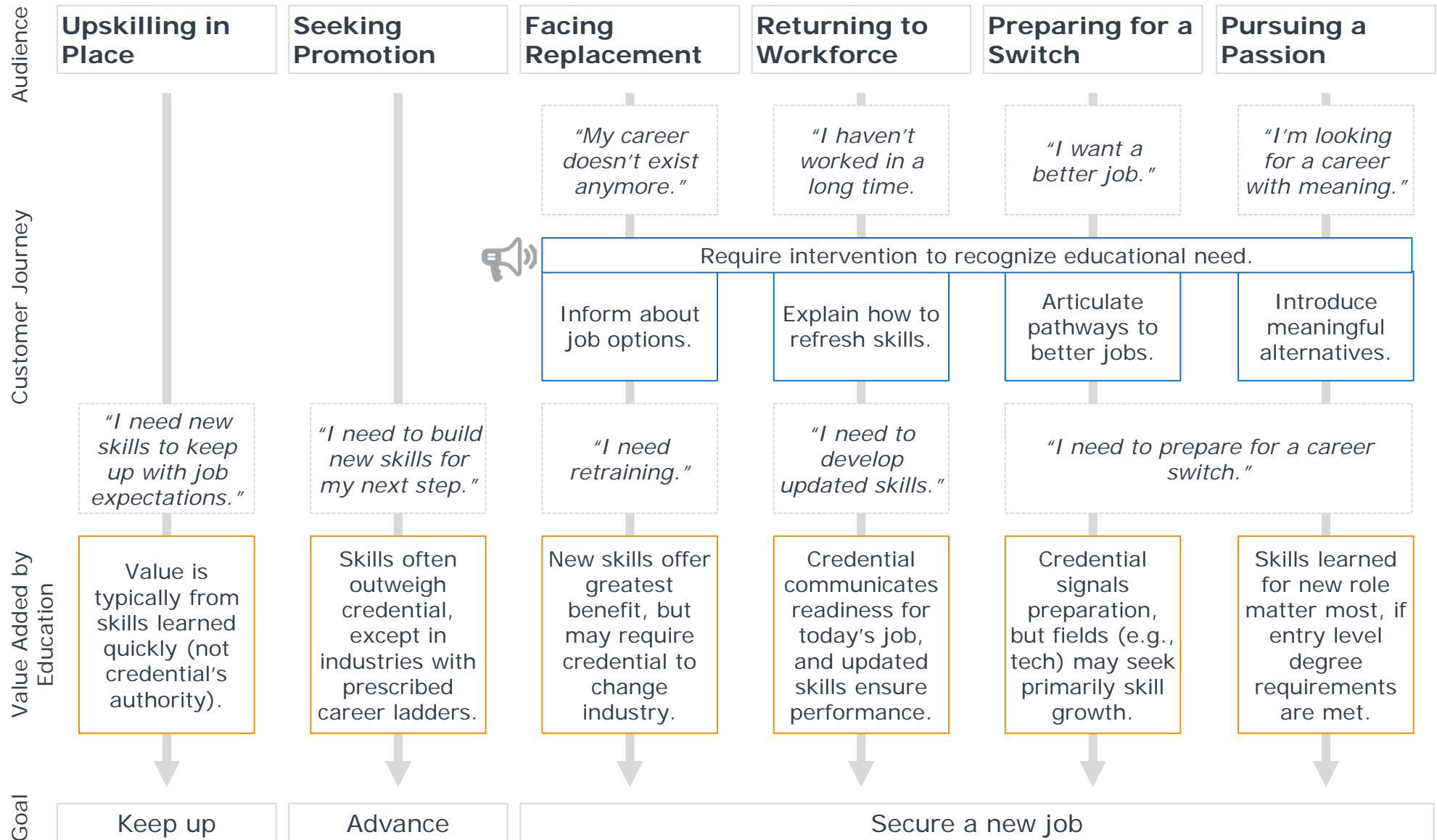
- 1 High Level of Investments Needed to Recruit—And Retain
- 2 Credit Transfer—A Complex Process
- 3 Risk of Winners-Take-All Market—At Least Regionally
- 4 Highly Price Sensitive Population

• Source: Shapiro, D., Dundar, A., Yuan, X., Harrell, A., Wild, J., Ziskin, M. (2014, July). Some College, No Degree: A National View of Students with Some College Enrollment, but No Completion (Signature Report No. 7). Herndon, VA: National Student Clearinghouse Research Center.

- Not a Monolith

# Getting Beyond “Working Professionals”

- Complex Motivations and Inflection Points Across Career Lifecycles



# 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?*

1

Understanding Adult Student Segments and Motivations

2

Assessing Regional Labor Market Demand

3

Aligning Opportunities with Internal Capabilities

AFTER ▶



### Audience-First Strategy

Key inputs:

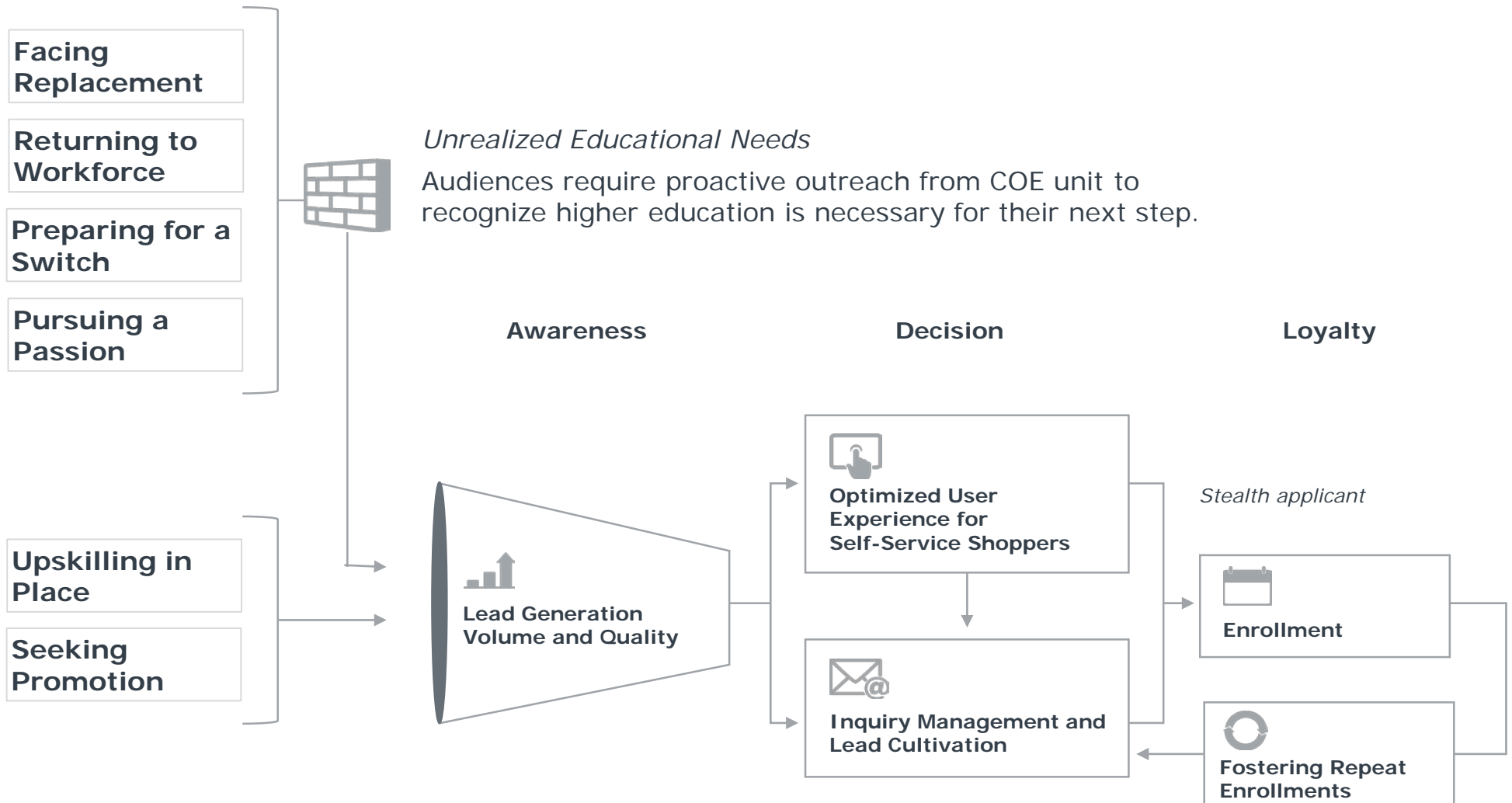
- Student motivations, career pathways, and market sizing
- Regional labor market data
- Program portfolio performance

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?*

# Unrealized Needs

- Students Not Always Looking for Next Educational Step

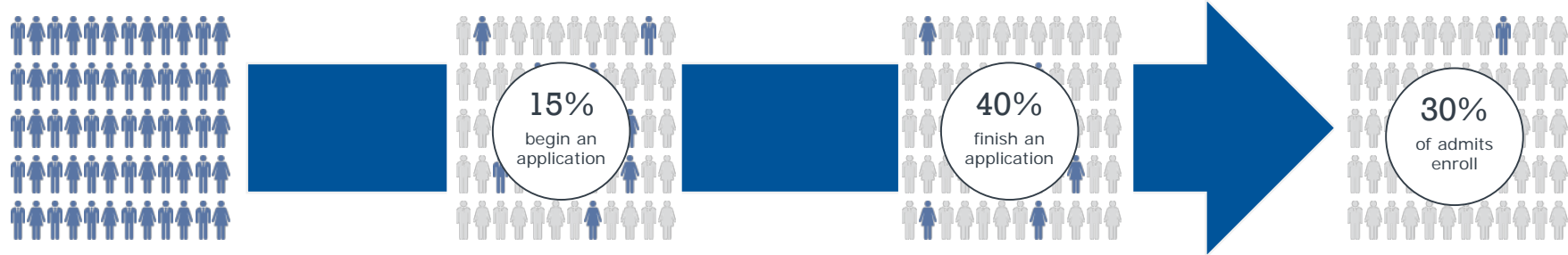


# “Last Mile” of Recruitment Effort Rife with Challenges

Strong Pipeline Building Can Be Compromised by Substandard Follow Through

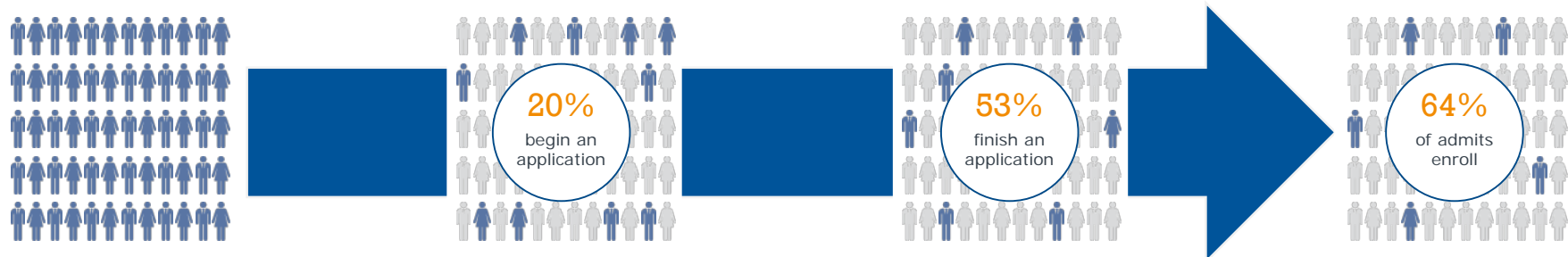
## Enrollment Results from Typical Adult Recruitment Campaigns: Industry Averages

*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

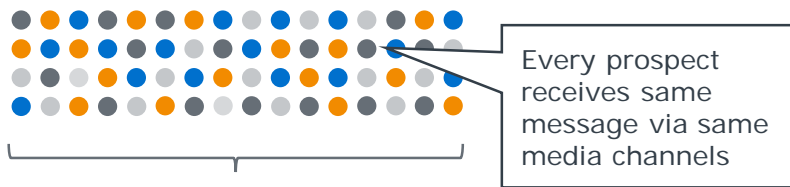
## A Tale of Two Partners:

Private University in the Northeast



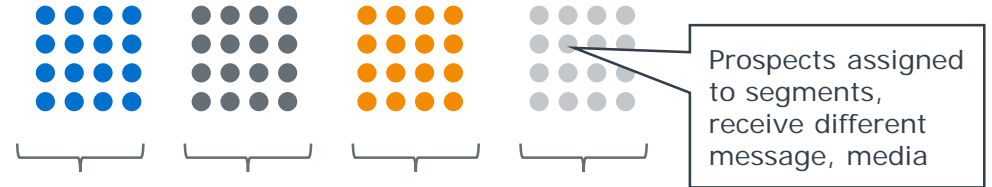
Vendor XYZ

Marketing Strategy: "One Size Fits All"



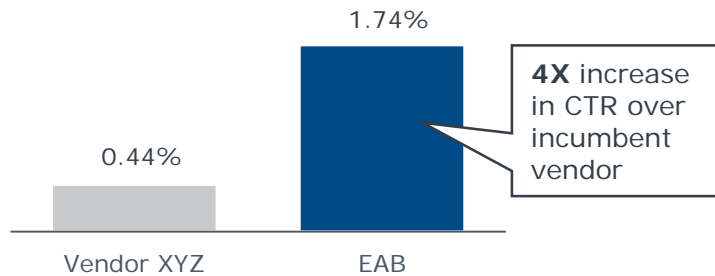
Adult and Working Professional Recruiting Initiative

Marketing Strategy: Customized Campaigns



### Drives Higher Prospect Response, Robust ROI

Click-Through Rate, Facebook Ad Campaigns



37 New Incremental Students within 6 months

# Preparing Early Career Managers to Lead

## Direct-to-Employer Outreach Shapes Program for New Managers



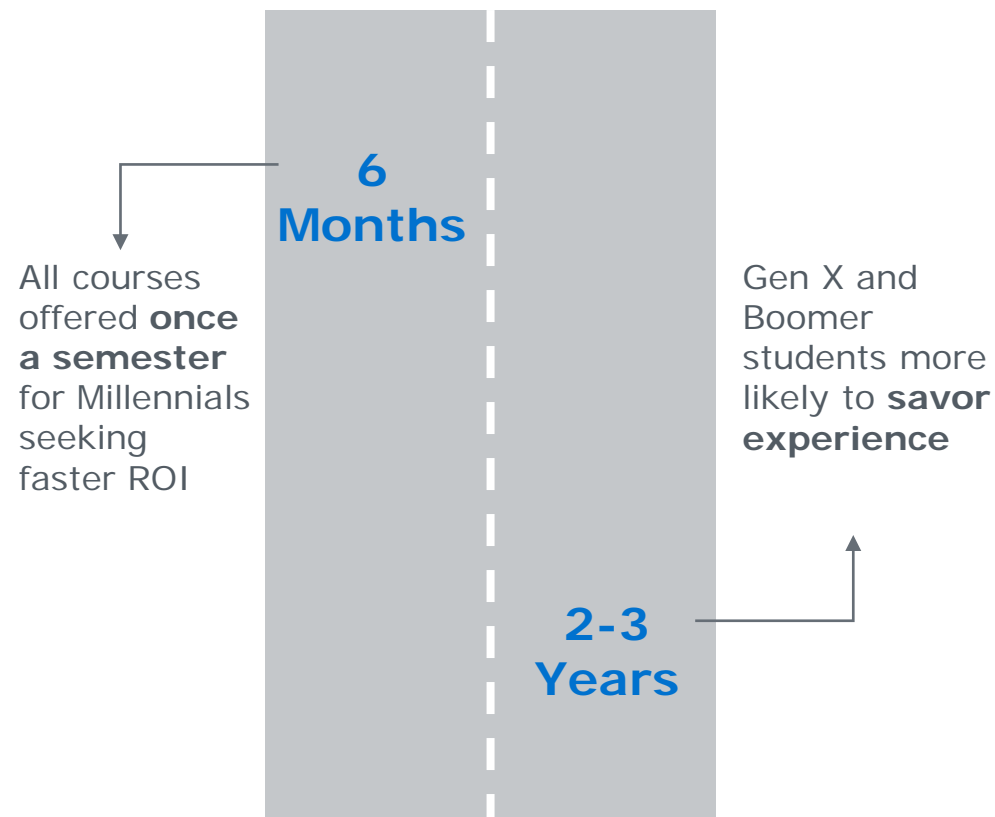
### Emerging Leaders Certificate

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



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The best  
practices are  
the ones that  
work for **you.**<sup>SM</sup>

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