



The Critical Role of Graduate Education in Enrollment Health

Scott Jaffe

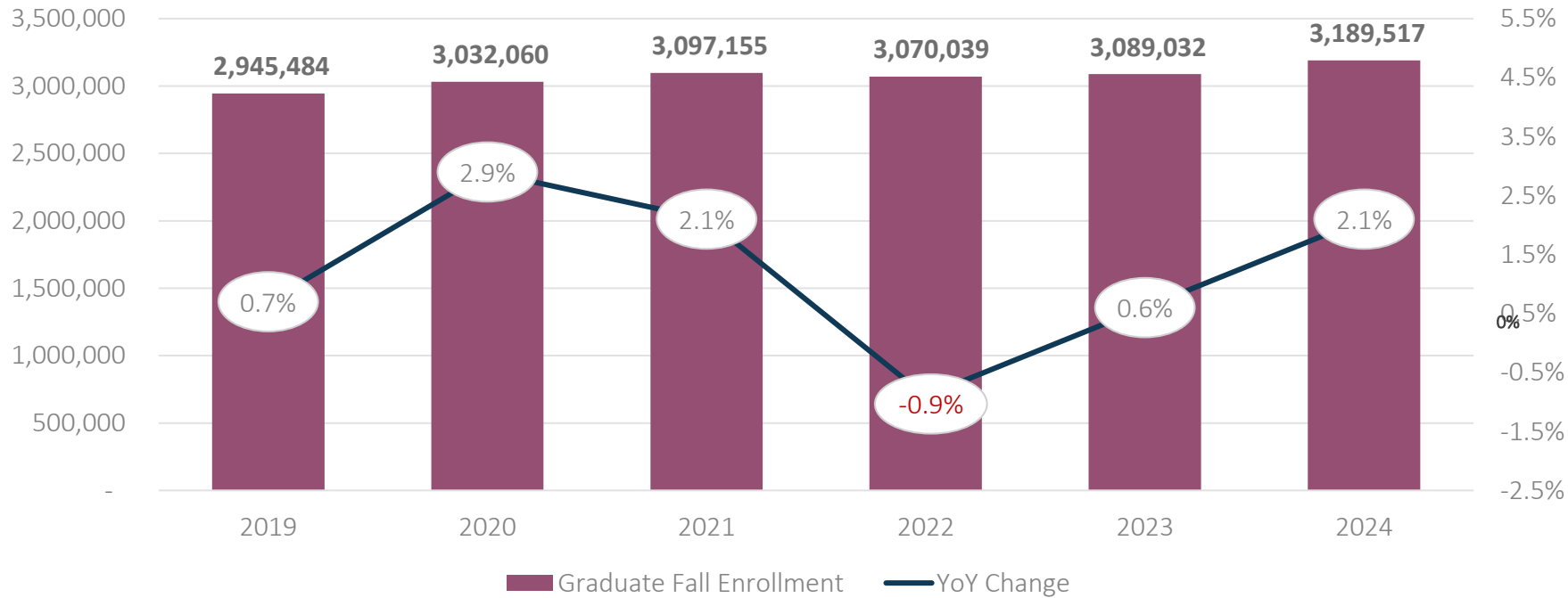
MARKET
RESEARCH
CONSULTING

Graduate Education Today

1

Graduate enrollment growth is strong

Fall Enrollment - Graduate

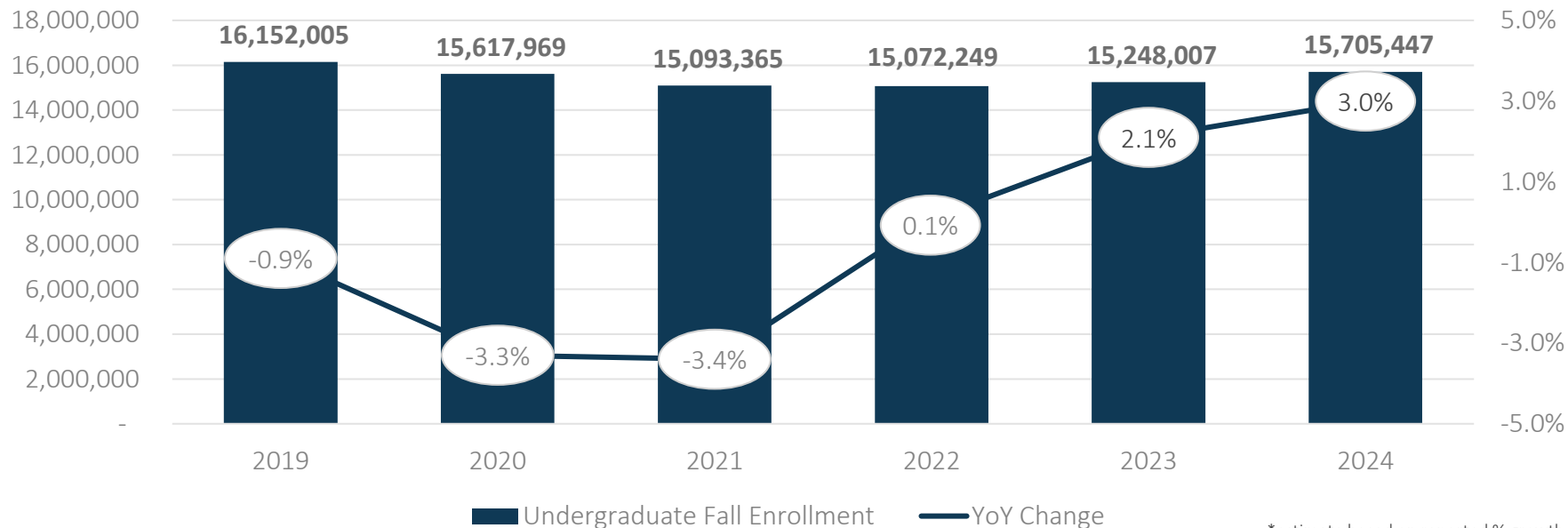


Source: Analysis of National Student Clearinghouse CTEE, [Fall 2024](#) using reported YoY percent growth.



Undergraduate enrollment is experiencing the “Pre-Cliff” growth that was projected.

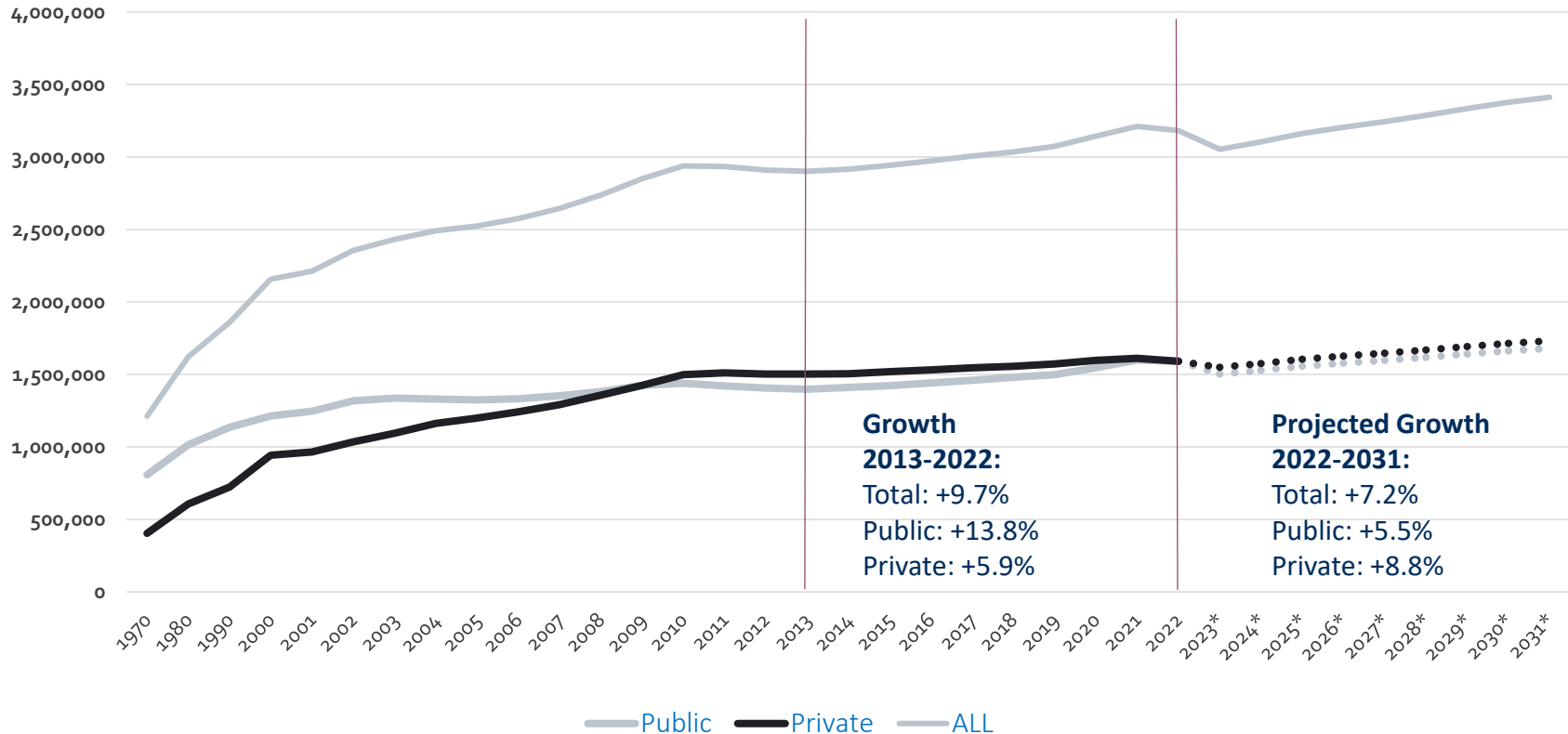
Fall Enrollment - Undergraduate



*estimate based on reported % growth.

Graduate Enrollment Projected to 2031

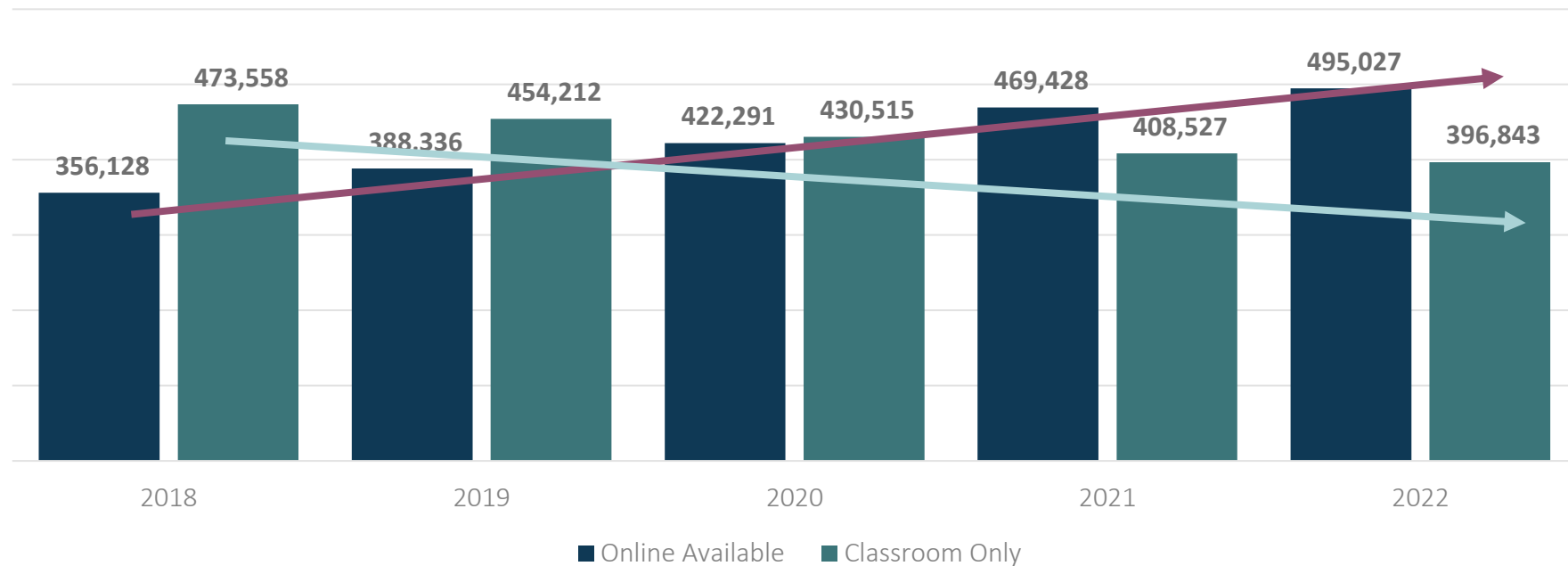
(by institution type)



*Source: IPEDS, Digest of Education Statistics 2022.

Graduate: Online Degree Production is now outpacing classroom

Graduate Degree Production by Format



Source: IPEDS Fall Enrollment institutional data.

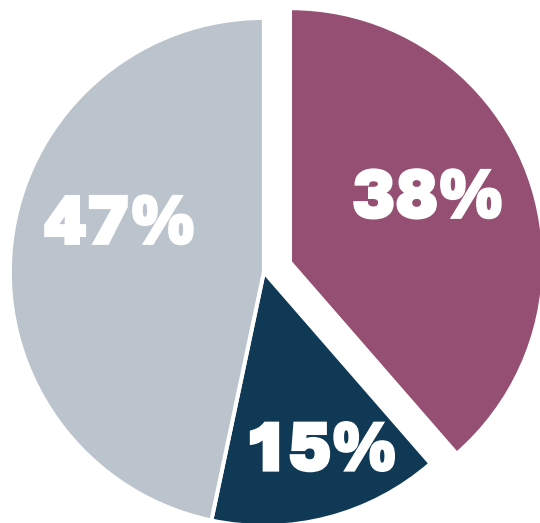
Graduate Students Today

2

When do you think online graduate enrollment will surpass classroom?

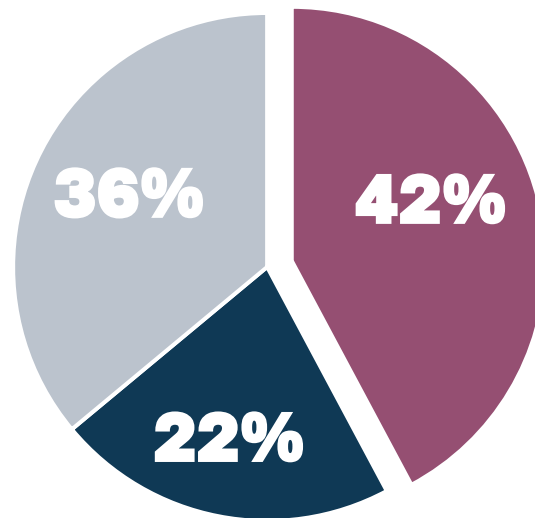
Graduate Enrollment is already Online Dominated

Fall 2022 Enrollment



■ All Online Courses ■ Some Online Courses
■ All Classroom Courses

12-Month Enrollment (2022-2023)



■ All Online Courses ■ Some Online Courses
■ All Classroom Courses

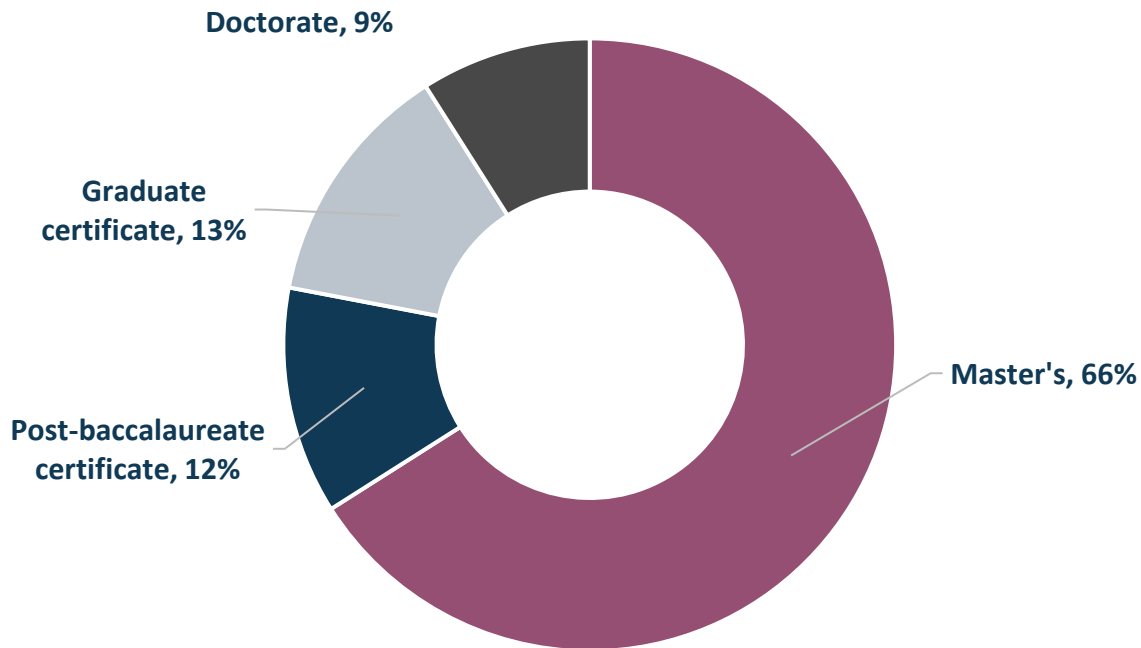
Source: Analysis of IPEDS 12-Month Unduplicated and Fall Enrollment Snapshot data. (U.S. degree granting institutions of at least two years.)

Where are you focusing your graduate expansion efforts?

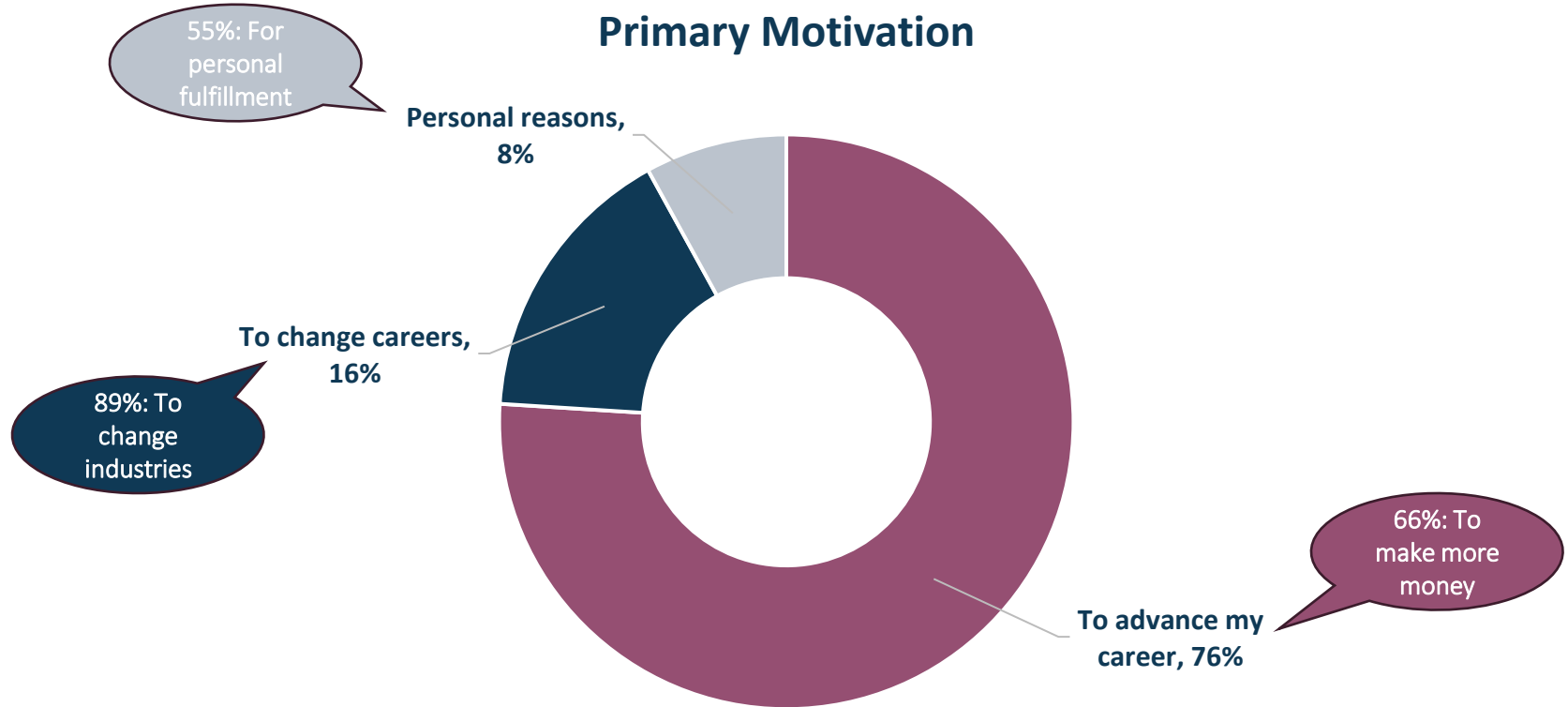
- *Master's?*
- *Certificates?*
- *Doctoral?*

Master's degrees continue to dominate the graduate market with steady demand for non-degree

Graduate Credential



Graduate students enroll in order to advance their careers – and make more money.



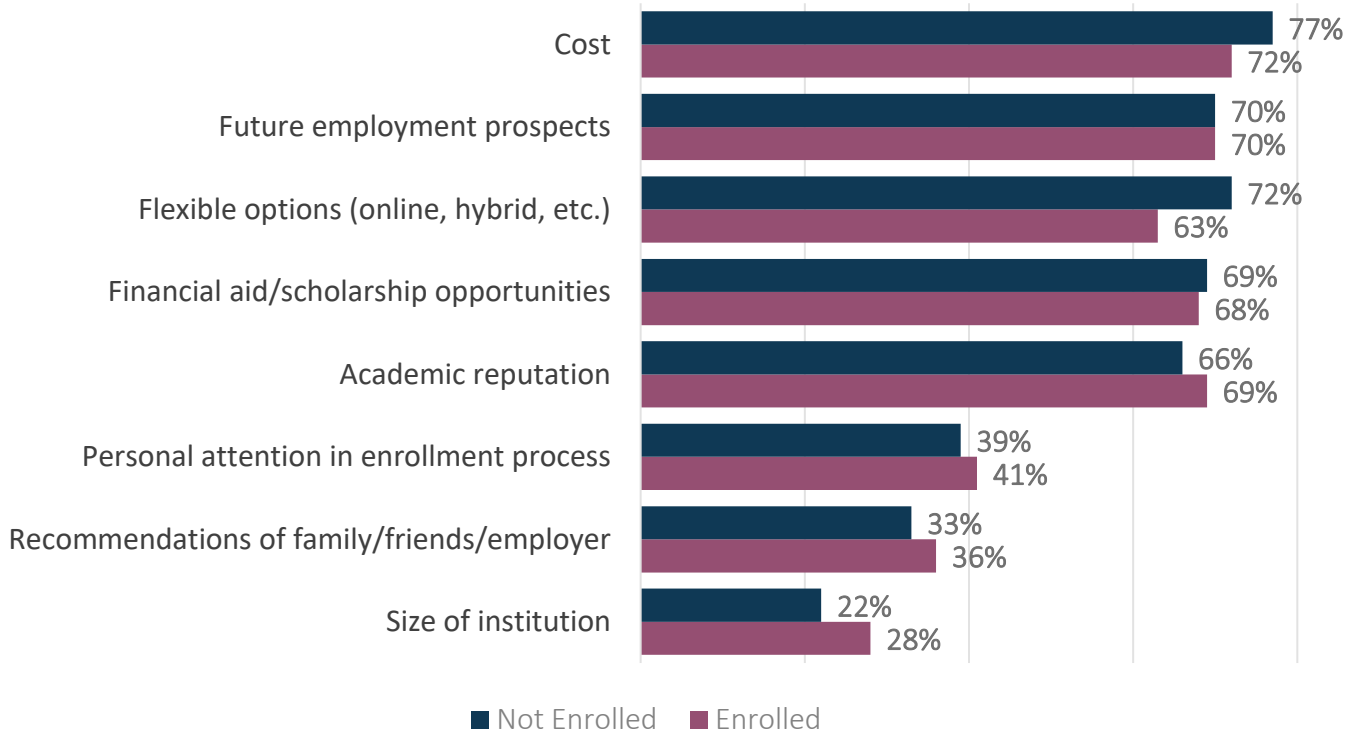
Business dominates, but demand for health and computer/info sciences programs continue follows.

	Post-bac certificate	Graduate certificate	Master's degree	Doctoral degree
Business	22%	24%	27%	8%
Health Professions	16%	11%	11%	30%
Computer/Information Science	12%	13%	10%	8%
Education	7%	8%	9%	10%
Counseling/Psychology	9%	6%	7%	11%
Arts and Humanities	5%	6%	6%	2%
Social Work/Public Administration	3%	4%	5%	2%
Engineering	7%	6%	5%	4%
Biological/Physical/Earth Sciences	3%	3%	5%	8%
Communications	3%	6%	4%	3%
Criminal Justice/Law/Homeland Security	3%	4%	4%	7%
Social Sciences	3%	2%	4%	2%
Other	8%	7%	4%	7%

What do you think is driving graduate students' enrollment decision-making?

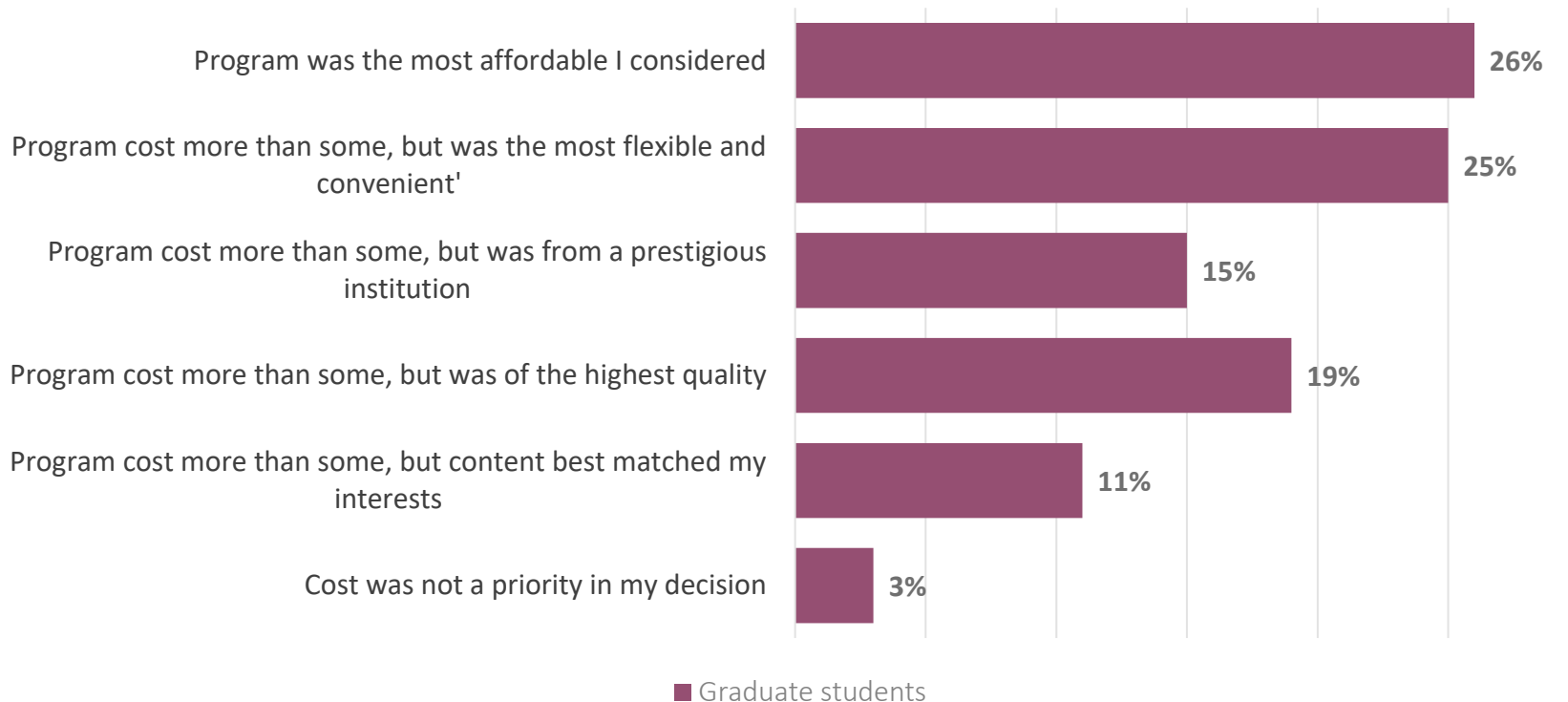
Cost, future employment, and flexible course options drive enrollment decisions.

Among 3 Most Important Factors in Enrollment



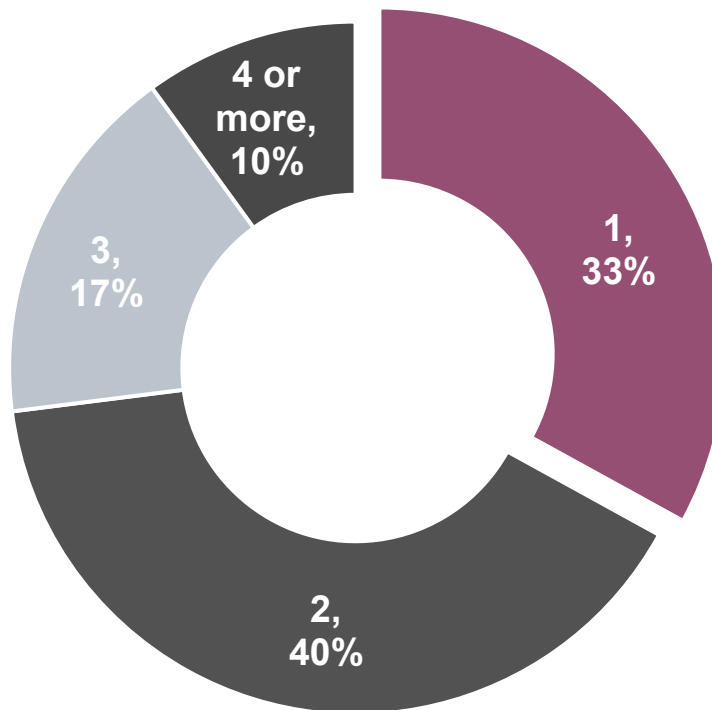
Graduate students will enroll in more expensive programs, most frequently when they are flexible.

Balancing Cost with Other Factors in Decision



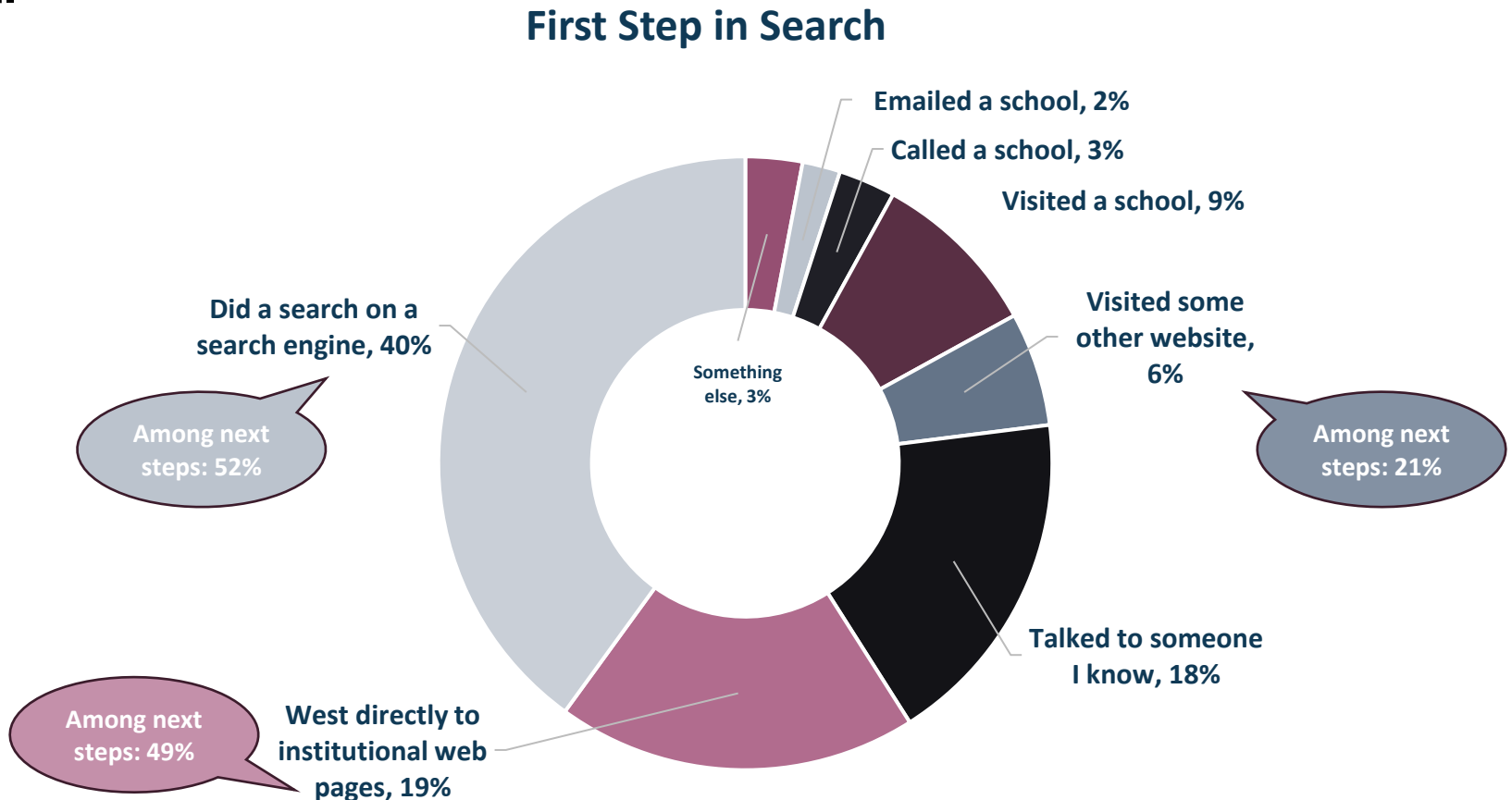
You are actively competing with more than inertia for graduate students.

Number of Program Applied To



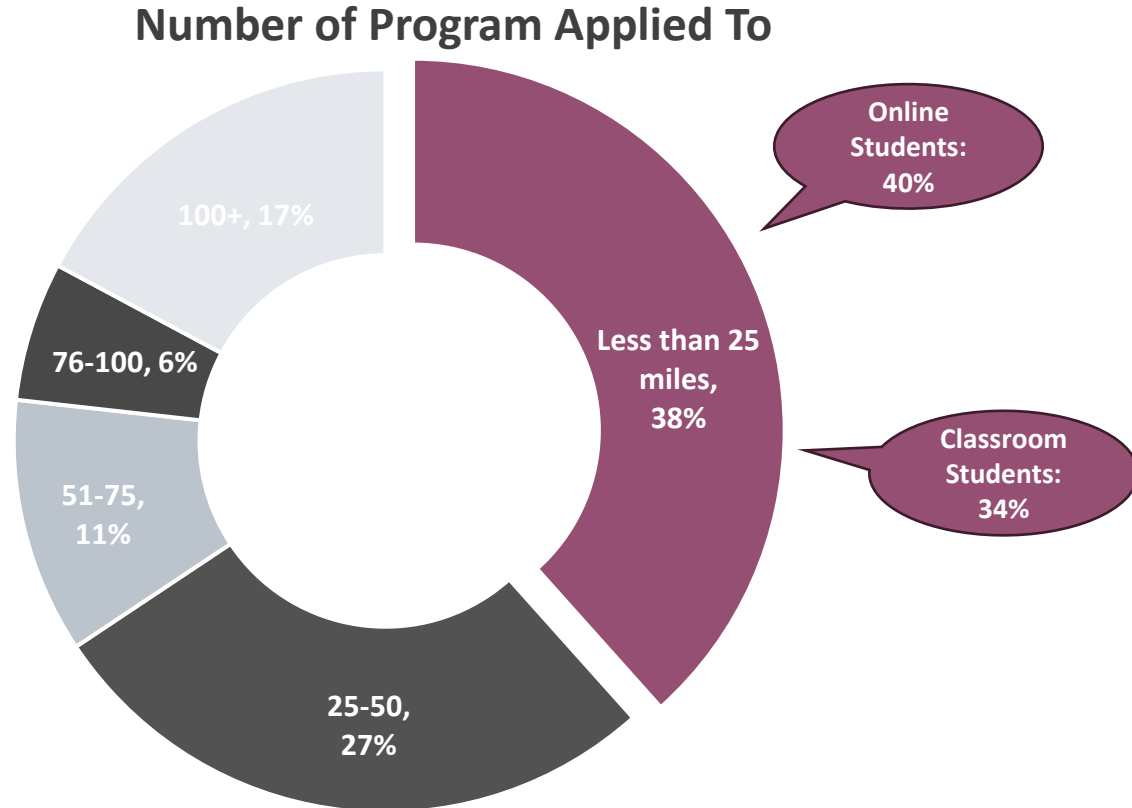
How are they going to find your programs?

Nearly all graduate students use a search engine in the opening days of their search.



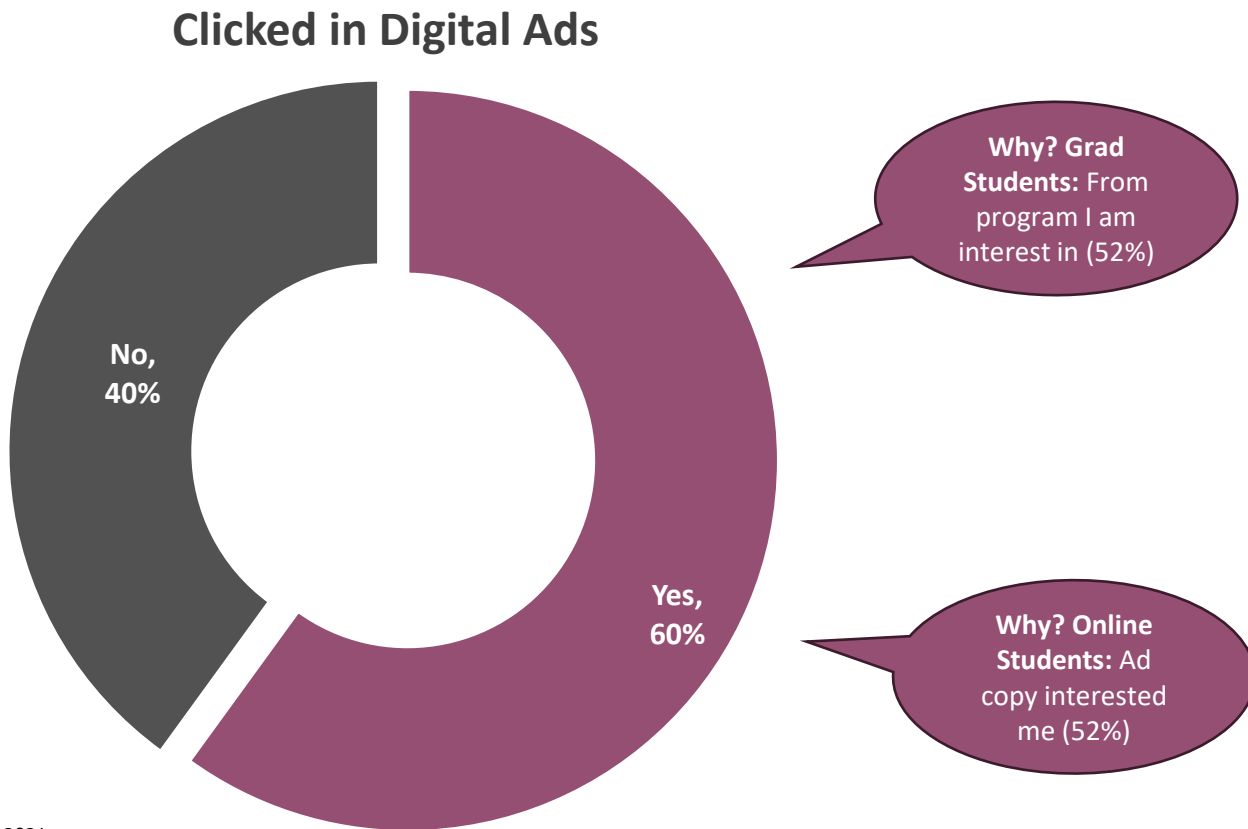
Source: 2023 Graduate Student Recruitment Report, RNL, 2024

Online students are even more likely to be local than are classroom (or hybrid)



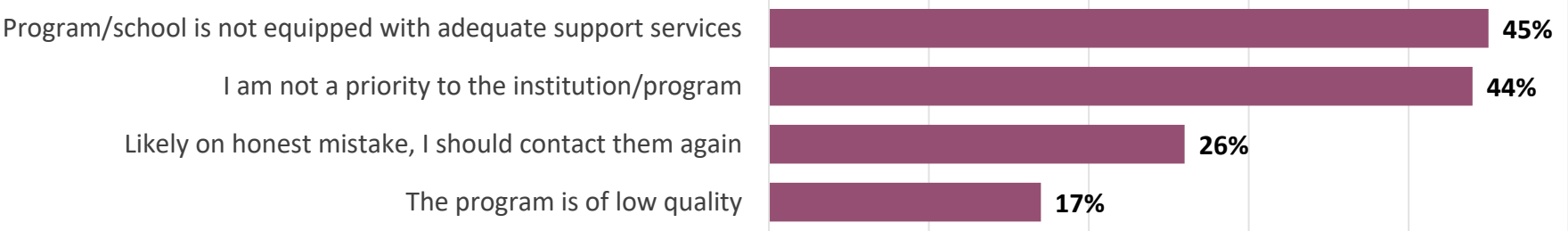
How targeted are your marketing and recruitment strategies?

Graduate students are not being sufficiently intrigued or interested by the typical digital ad (unlike online).

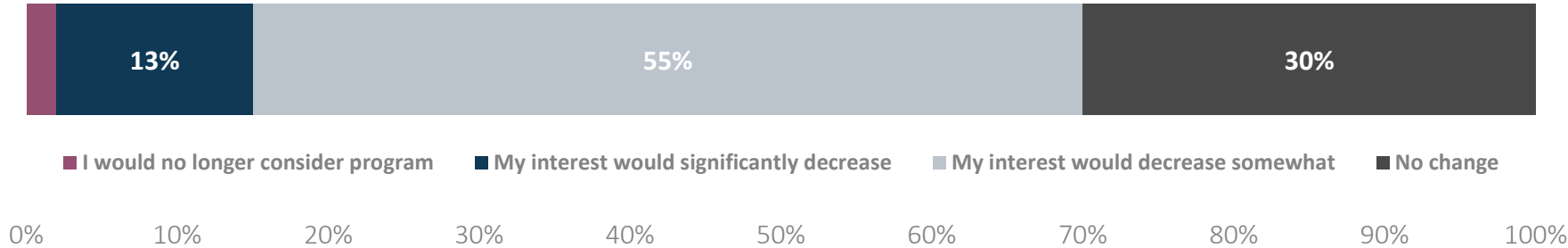


The best programs, with the best marketing, are stunted by ineffective follow up.

Implication of a Slower than Expected Response



Impact of Slower Than Expected Response on Interest



Source: 2023 Graduate Student Recruitment Report, RNL, 2024

A background image showing a hand holding a pen, writing on a document. The image is overlaid with a semi-transparent blue filter. The text "Thank you" is centered in white.

Thank you