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Using Research to Enhance Your Graduate and Online Program Strategy
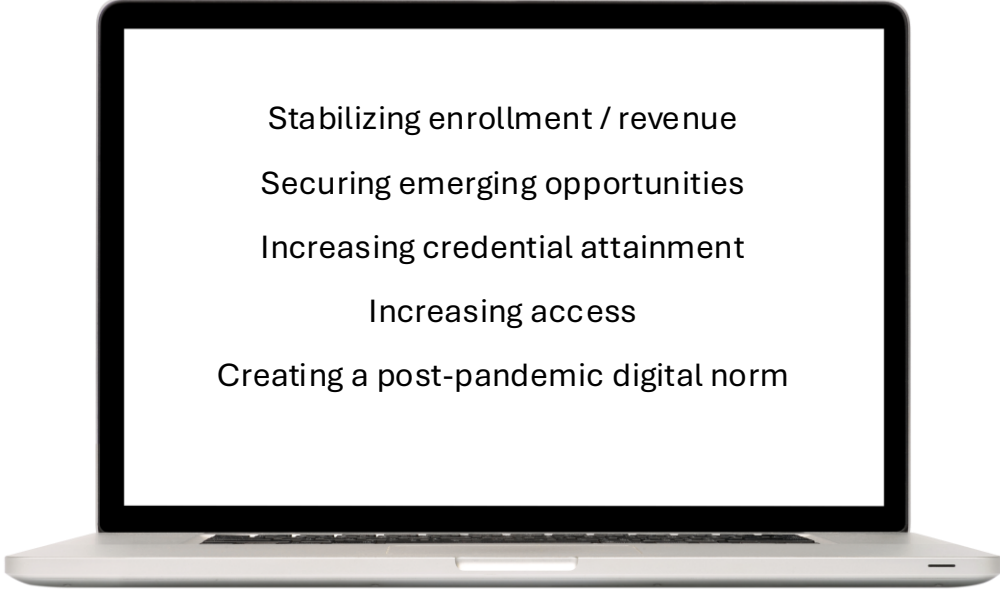
Jessica Ickes, Vice President, Market and Research Services
Dr. Ken Newbold, Assistant Vice President, Market and Research Services
Dr. Dawn Fortin Mattoon, Assistant Vice President, Strategic Enrollment

What is Driving your Graduate and Online Strategy?

Leveraging history while innovating and energizing

Stabilizing enrollment / revenue

Securing emerging opportunities

Increasing credential attainment

Increasing access

Creating a post-pandemic digital norm

Moving GO from the Margin to the Core

Things to consider

- Traditional direct from high school enrollment is shifting and declining.

- Competition for adults and graduate students is intense.

- Attainment rates have increased over the recent decade.

- High wages for entry-level jobs are providing a competitive alternative to attending college.

- The higher education value proposition is in question.

- Certificates, micro-credentials, and non-credit options have expanded.

- Digital connection is the new normal.

- Collaboration is critical.

"Culture is not an initiative. Culture is the enabler of all initiatives." – Larry Senn

Data-Informed Instead of Data-Driven

Strategy: "A plan of action designed to achieve a major or overall aim"
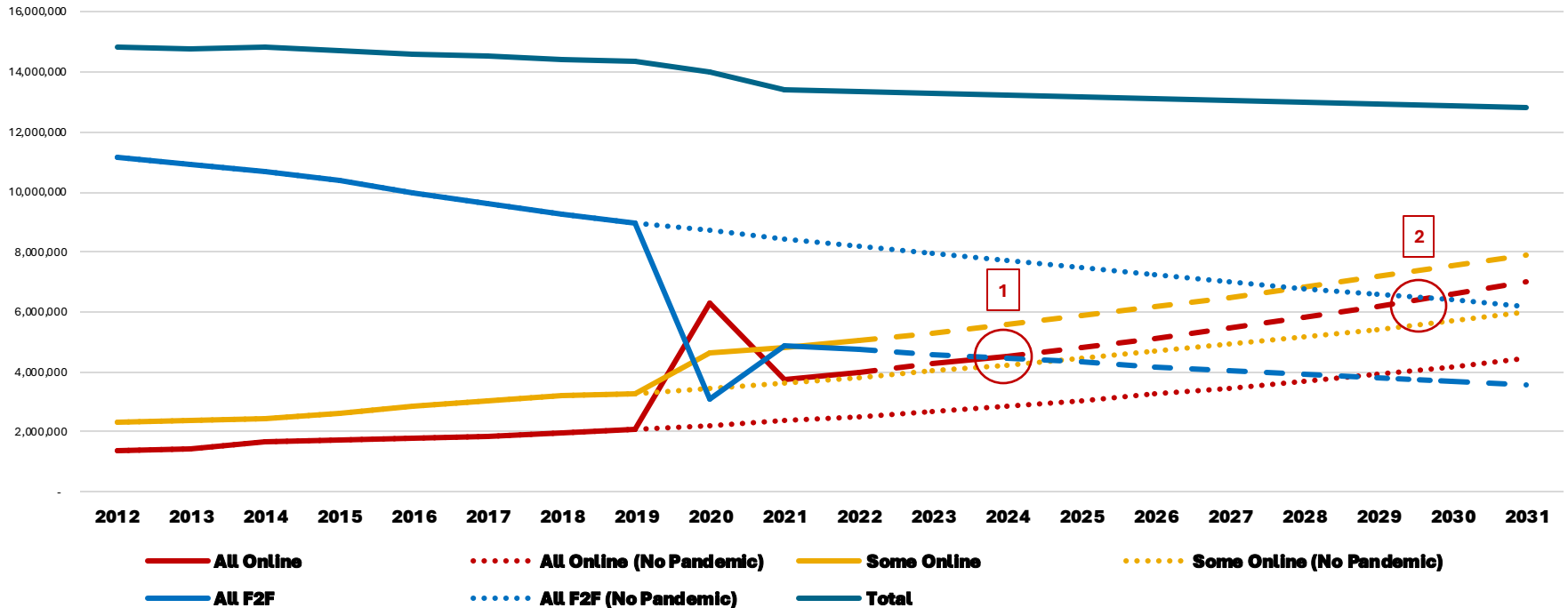
- Situation Analysis

    - SCOT – *strengths, challenges, opportunities, threats*....

    - Coupling internal and external data to understand the current state
        - Where is there capacity and where should capacity be added?
        - What are the institutional program strengths (reputation, relevance, authenticity)?
        - How do your current Graduate and Online offerings align with demand research?

- Action Planning

    - What are the steps to implement?

    - What resources are needed?

    - What is the market size and how much share can we secure?

    - What are the characteristics of the students we want to enroll and how will we engage with them?

A Growing Graduate and Online Market

Undergraduate Enrollment Trends and Format Choice
(With and Without the Pandemic)
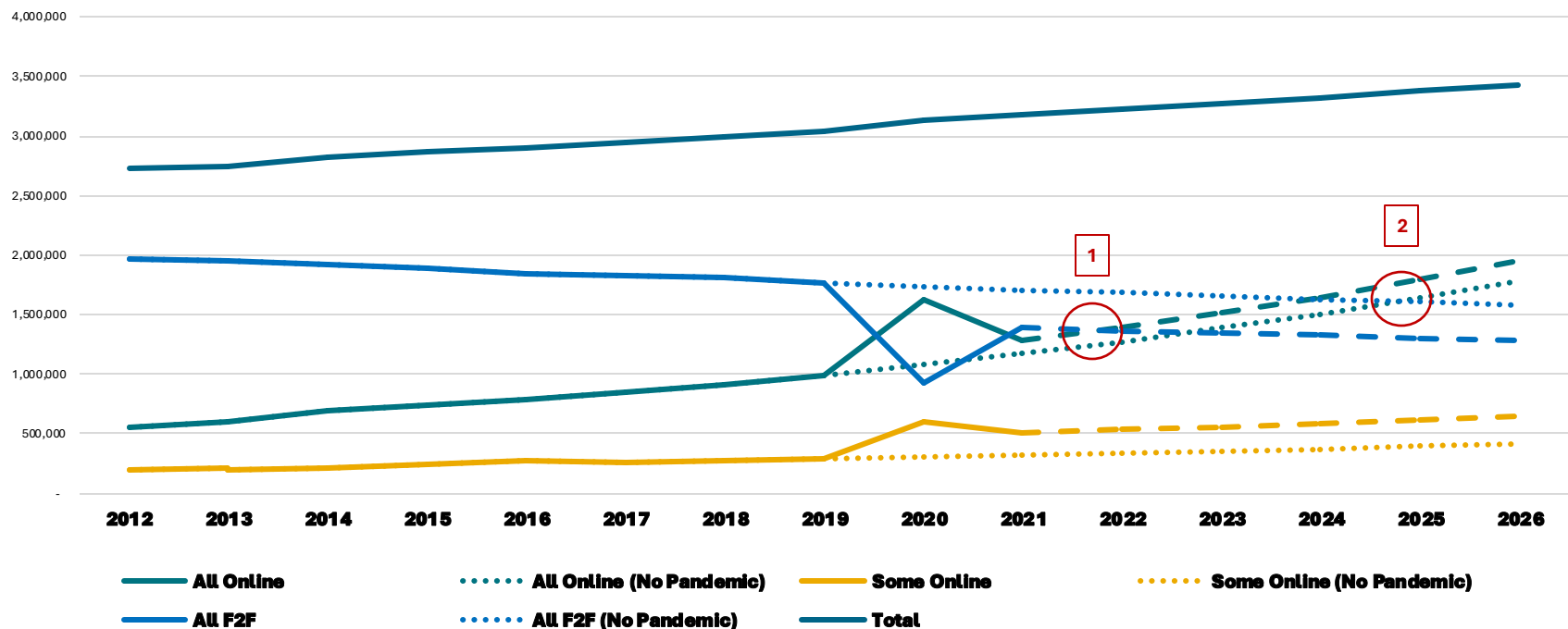

Fall Enrollment: Undergraduate

Legend:
- All Online (red solid)
- All Online (No Pandemic) (red dotted)
- Some Online (yellow solid)
- Some Online (No Pandemic) (yellow dotted)
- All F2F (blue solid)
- All F2F (No Pandemic) (blue dotted)
- Total (dark teal solid)

Graduate Enrollment Trends and Format Choice
(With and Without the Pandemic)

Fall Enrollment: Graduate

Legend:
- All Online
- All Online (No Pandemic)
- Some Online
- Some Online (No Pandemic)
- All F2F
- All F2F (No Pandemic)
- Total

Graduate Enrollment is Returning to Pre-Pandemic Rates of Growth

2,948,070 • 2,958,476 • 2,980,678 • 3,071,237 • 3,143,525 • 3,104,950 • 3,126,684

YoY Change: 0.4% (2018), 0.8% (2019), 3.0% (2020), 2.4% (2021), -0.9% (2022), 0.7% (2023)

Legend: Graduate Fall Enrollment — YoY Change
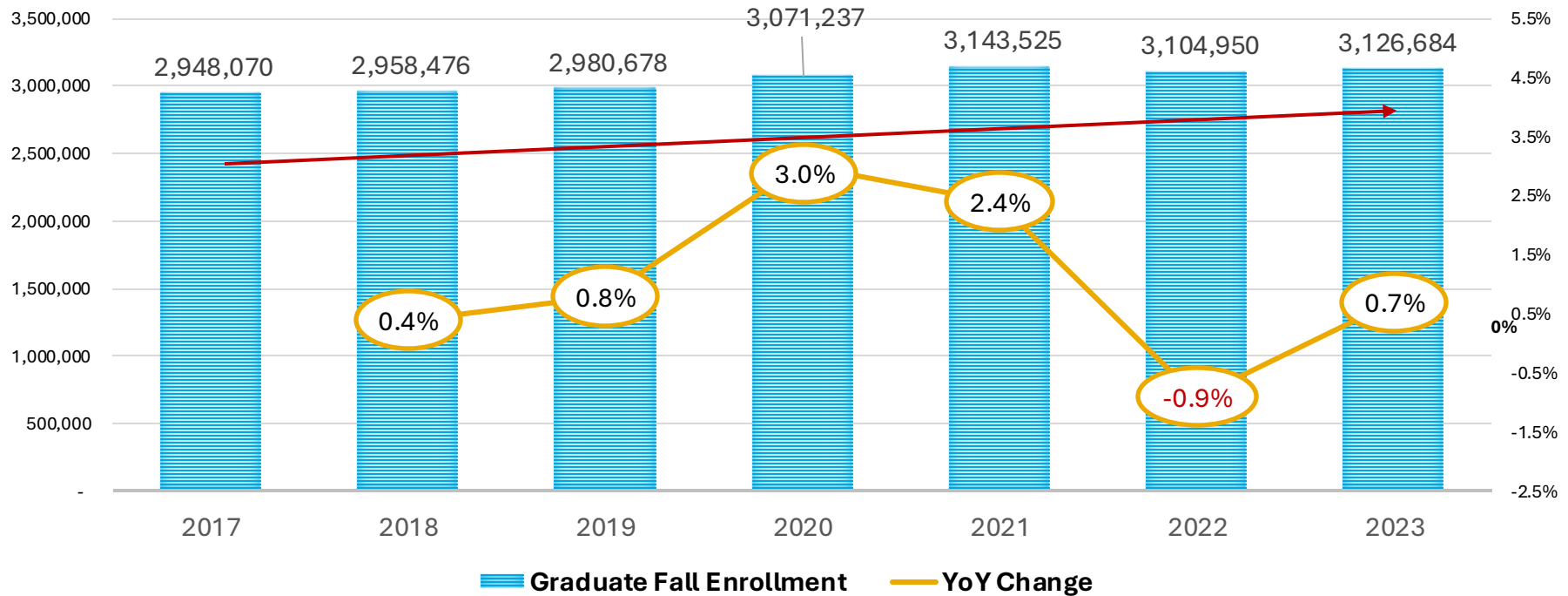
*Source: National Student Clearinghouse, CTEE, Fall 2022

Utilizing Internal Data in Graduate and Online Program Strategy
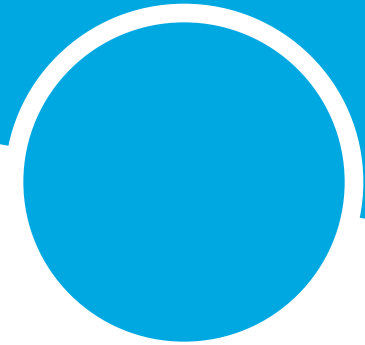
Current Program Performance

Understanding what we know about existing programs

ENROLLMENT
TRENDS

PROGRAM
MIGRATION PATTERNS

RETENTION AND
COMPLETION

Current Program Performance

Financial and Operational Metrics

- Credit hour generation

- Courses/credit hours required for the program

- Ratio of shared courses with other programs and general education (if applicable)

- Instructional mix

- Space and equipment needs including capital expenses

- Revenues (tuition, gifts, appropriations, endowments) and costs of the program

- Capacity

What we Know About Graduate and Online Program Preferences
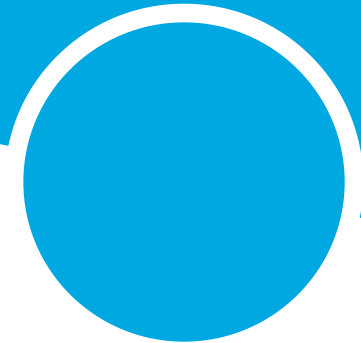
Graduate Programs All Modalities

Intended Graduate Format

Fully Online, 39%

All Classroom, 18%

Partially Online, 43%
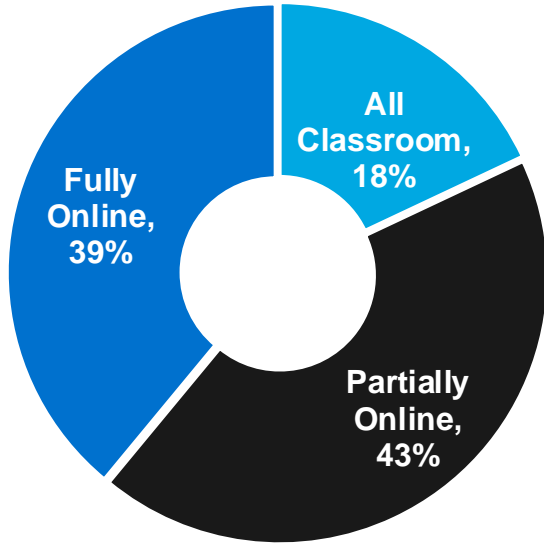
Broad Subject of Intended Graduate Study	Percent of Total
Business	24%
Health Professions	13%
Computer/Information Science	11%
Education	9%
Counseling/Psychology	7%
Arts & Humanities	6%
Social Work/Public Administration	5%
Engineering	5%
Biological/Physical/Earth Sciences	5%
Communications	4%
Criminal Justice/Law/Homeland Security	4%
Social Sciences	3%

Graduate Programs All Modalities

Broad Subject of Intended Graduate Study	Post-Bacc Certificate	Grad 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 & 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%

Online Programs

Intended Undergraduate Major	Percent of Total
Business Administration	16%
Computer/Information Science	6%
Psychology	5%
Accounting	5%
Criminal Justice	4%
Biology	4%
Art	4%
Nursing	4%
Healthcare Administration	3%
Computer Engineering	2%

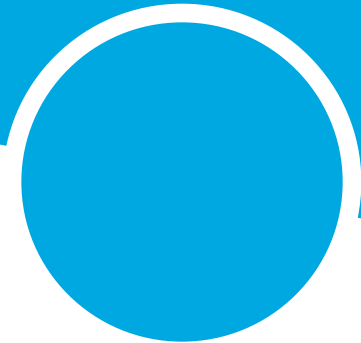| Intended Graduate Major	Percent of Total
Business Administration	19%
Accounting	4%
Computer/Information Science	4%
Education/Higher Ed Administration	3%
Psychology	3%
Nursing	3%
Business Analytics	3%
Artificial Intelligence	3%
Healthcare Administration	3%
Art	3%
Social Work	3%

Online Program Characteristics

Similar program characteristic preference for undergrad and graduate

What characteristics do you value most in a program?

Characteristic	Undergraduate	Graduate
Flexibility to accelerate my completion or take breaks when I need to	62%	62%
Consistent layout and navigation across all courses	51%	50%
Opportunities to network with employers/build connections in my field	44%	48%
Many different choices for elective courses	42%	39%
Opportunities to meet with my instructor and classmates in person	27%	30%
Taking all my courses with the same cohort of students	24%	27%

Legend: ■ Undergraduate ■ Graduate
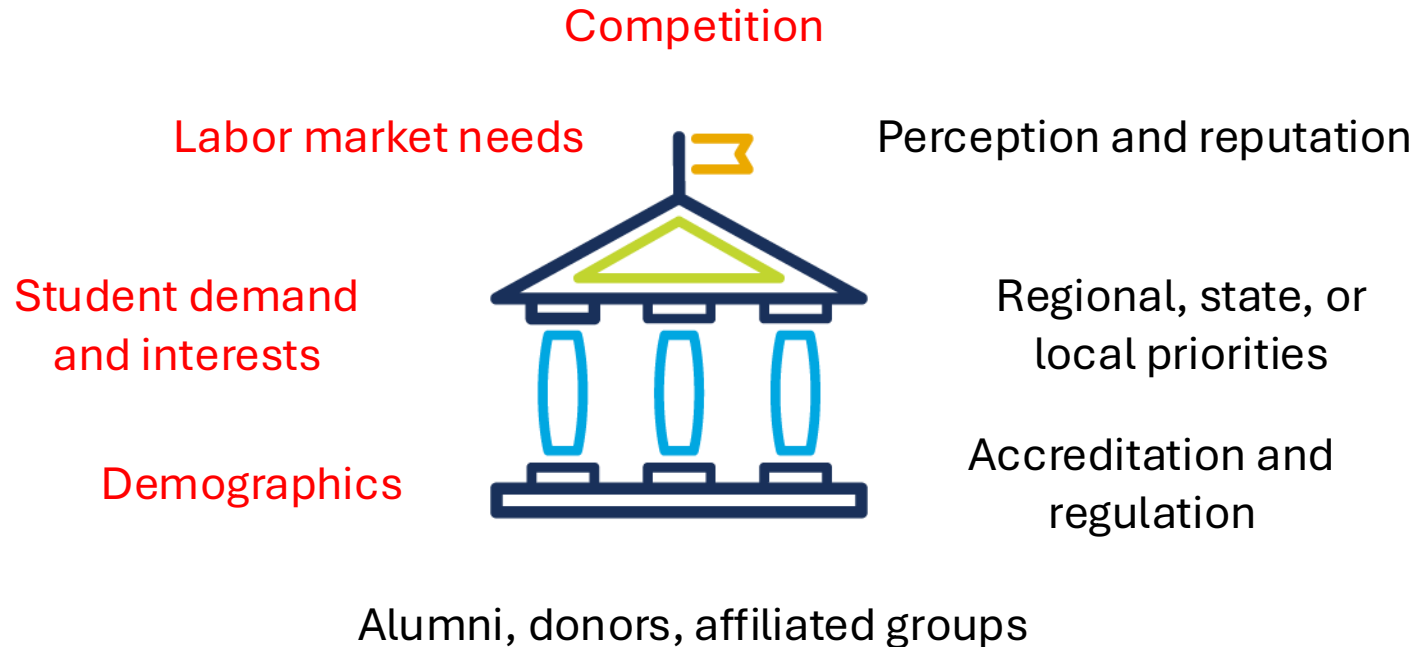
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Utilizing Market Research in Graduate and Online Program Strategy

External Influences

They are all around us and can have positive and negative impacts

Competition

Labor market needs

Perception and reputation

Student demand and interests

Regional, state, or local priorities

Demographics

Accreditation and regulation

Alumni, donors, affiliated groups

Understanding the Market Starts with Demographics

National population increase of 6%

Population by Age Cohort

■ 2024 Population   ■ 2034 Population
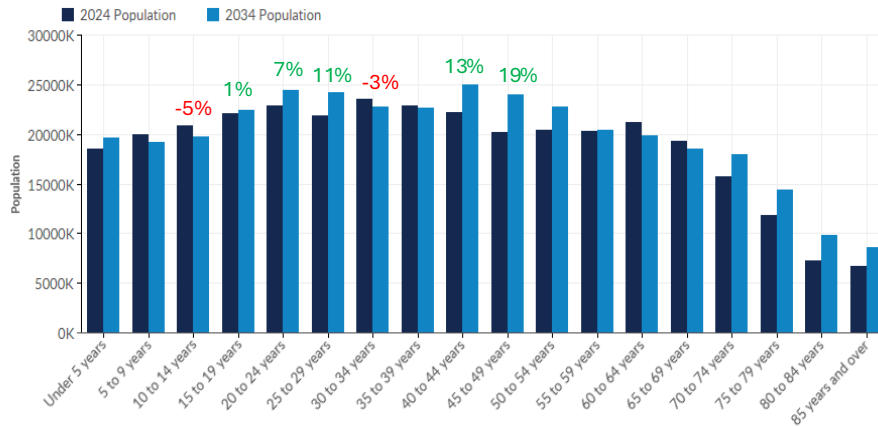
Other factors

- Region, state, locality variation

- Migration patterns—amplified by the pandemic

- Degree attainment rates

- Changes in racial/ethnic composition

Student Demand

Using existing sources helps to understand prior or current student demand

NATIONAL STUDY DATA

ADMISSIONS FUNNEL TRENDS

PUBLICLY AVAILABLE SOURCES LIKE IPEDS

Academic Program Demand – Associate's

Nationally, at the associate's degree level in 2022, 67% of degrees have been awarded in the top 20 program CIPS, 51% in the top 5 CIPS, and 39% with a distance

CIP Code	Description	Annual Openings	2022 Assoc Completions	Five Year Change in Degree Completions
24.0101	Liberal Arts and Sciences/Liberal Studies	2,798,675	249,307	-4.36%
24.0102	General Studies	2,798,675	96,504	-1.68%
51.3801	Registered Nursing/Registered Nurse	311,103	81,362	5.16%
52.0201	Business Administration and Management, General	2,310,573	58,485	4.69%
30.0101	Biological and Physical Sciences	324,784	25,622	4.08%
24.0103	Humanities/Humanistic Studies	11,832	19,355	-7.49%
42.0101	Psychology, General	420,052	19,151	54.88%
24.0199	Liberal Arts and Sciences, General Studies and Humanities, Other	2,706,400	18,414	-0.64%
52.0101	Business/Commerce, General	940,648	17,265	0.03%
43.0103	Criminal Justice/Law Enforcement Administration	356,504	10,900	61.91%
45.0101	Social Sciences, General	159,382	10,777	-6.10%
51.0000	Health Services/Allied Health/Health Sciences, General	268,387	9,670	209.44%
47.0604	Automobile/Automotive Mechanics Technology/Technician	146,186	8,575	11.09%
26.0101	Biology/Biological Sciences, General	224,865	7,859	34.90%
13.1210	Early Childhood Education and Teaching	619,013	7,400	2.83%
43.0104	Criminal Justice/Safety Studies	503,337	7,379	-9.33%
43.0107	Criminal Justice/Police Science	93,980	7,353	-44.42%
51.0911	Radiologic Technology/Science - Radiographer	31,776	7,098	19.11%
52.0302	Accounting Technology/Technician and Bookkeeping	378,278	6,355	-15.15%
19.0709	Child Care Provider/Assistant	417,610	6,187	16.71%

Academic Program Demand – Bachelor's

Nationally, at the bachelor's degree level in 2022, 48% of degrees have been awarded in the top 20 program CIPS, 25% in the top 5 CIPS, and 25% with a distance

CIP Code	Description	Annual Openings	2022 Bach Completions	Five Year Change in Degree Completions
51.3801	Registered Nursing/Registered Nurse	311,103	152,105	8.57%
52.0201	Business Administration and Management, General	2,310,573	139,196	-3.51%
42.0101	Psychology, General	420,052	115,396	5.47%
26.0101	Biology/Biological Sciences, General	224,865	79,939	5.51%
52.0801	Finance, General	802,399	46,227	5.78%
52.0301	Accounting	486,821	44,291	-14.72%
52.1401	Marketing/Marketing Management, General	307,423	42,427	4.27%
11.0701	Computer Science	485,491	41,725	51.44%
45.1001	Political Science and Government, General	343,212	40,907	6.42%
14.1901	Mechanical Engineering	74,058	35,216	-0.57%
43.0104	Criminal Justice/Safety Studies	503,337	30,971	-1.22%
13.1202	Elementary Education and Teaching	145,115	30,529	7.99%
09.0101	Speech Communication and Rhetoric	59,459	29,193	-14.23%
23.0101	English Language and Literature, General	183,671	28,899	-16.67%
45.1101	Sociology, General	318,779	27,617	-9.58%
31.0505	Exercise Science and Kinesiology	73,126	26,537	3.61%
11.0101	Computer and Information Sciences, General	492,989	26,130	22.55%
52.0101	Business/Commerce, General	940,648	25,347	-3.53%
54.0101	History, General	184,510	23,568	-7.09%
24.0101	Liberal Arts and Sciences/Liberal Studies	2,798,675	22,261	-11.58%

Source: IPEDS Data Center

Academic Program Demand – Master's

Nationally, at the master's degree level in 2022, 43% of degrees have been awarded in the top 20 program CIPS, 22% in the top 5 CIPS, and 56% with a distance

CIP Code	Description	Annual Openings	2022 Masters Completions	Five Year Change in Degree Completions
52.0201	Business Administration and Management, General	2,310,573	106,249	-0.98%
44.0701	Social Work	229,733	33,244	13.13%
51.3801	Registered Nursing/Registered Nurse	311,103	19,918	19.79%
13.0401	Educational Leadership and Administration, General	50,878	19,450	0.15%
52.1301	Management Science	368,614	17,084	261.18%
13.0101	Education, General	527,931	16,667	-18.17%
13.0301	Curriculum and Instruction	21,788	15,956	4.23%
52.0301	Accounting	486,821	15,418	-21.83%
13.1001	Special Education and Teaching, General	212,001	14,783	26.25%
51.3805	Family Practice Nurse/Nursing	250,664	14,378	13.00%
51.0701	Health/Health Care Administration/Management	567,135	13,380	32.41%
52.1399	Management Sciences and Quantitative Methods, Other	501,481	13,189	352.14%
11.0701	Computer Science	485,491	12,077	-4.09%
44.0401	Public Administration	497,410	11,725	-3.72%
51.2201	Public Health, General	204,306	11,620	14.57%
13.1101	Counselor Education/School Counseling and Guidance Services	29,962	11,612	5.11%
51.0912	Physician Assistant	12,986	11,069	29.77%
11.0101	Computer and Information Sciences, General	492,989	10,423	-8.08%
52.0101	Business/Commerce, General	940,648	9,276	-3.01%
13.1202	Elementary Education and Teaching	145,115	8,899	15.56%

Labor Market Demand

Using existing sources helps to understand recent, current, and projected labor market needs

Bureau of Labor Statistics

Lightcast – Job Posting Data

Labor Market Needs – Associate's

Advertised wages rose 26.6% in postings over the last 3 years for positions requiring an associate's degree

Top Posted Occupations

Occupation	Total/Unique (Jun 2023 - May 2024)	Posting Intensity	Median Posting Duration
Registered Nurse	1,286,756 / 316,097	4 : 1	26 days
Licensed Practical / Vocational Nurse	988,311 / 272,374	4 : 1	25 days
Office / Administrative Assistant	203,429 / 76,372	3 : 1	26 days
Medical Assistant	198,452 / 65,886	3 : 1	26 days
Retail Store Manager / Supervisor	137,722 / 51,272	3 : 1	27 days
Nursing Manager / Supervisor	171,512 / 49,904	3 : 1	26 days
Customer Service Representative	114,811 / 39,844	3 : 1	25 days
Teacher Assistant	100,782 / 39,445	3 : 1	26 days
Bookkeeper / Accounting Clerk	99,100 / 35,762	3 : 1	26 days
Sales Representative	102,333 / 34,032	3 : 1	26 days

Labor Market Needs – Bachelor's

Advertised wages rose 38.6% in postings over the last 3 years for positions requiring a bachelor's degree
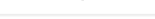
Top Posted Occupations

Occupation	Total/Unique (Jun 2023 - May 2024)	Posting Intensity	Median Posting Duration
Registered Nurse	1,959,906 / 465,142	4 : 1	26 days
Software Developer / Engineer	762,391 / 265,273	3 : 1	22 days
Sales Representative	514,878 / 179,402	3 : 1	27 days
Project Manager	427,228 / 168,400	3 : 1	25 days
Business Development / Sales Manager	426,976 / 159,966	3 : 1	26 days
Retail Store Manager / Supervisor	368,967 / 125,861	3 : 1	27 days
Business / Management Analyst	271,128 / 113,169	2 : 1	23 days
Office / Administrative Assistant	302,796 / 105,887	3 : 1	26 days
Accountant	307,406 / 102,372	3 : 1	26 days
Account Manager / Representative	272,842 / 98,916	3 : 1	26 days

Source: Job Postings, Lightcast™ .

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# Labor Market Needs – Master's

Advertised wages rose 15.3% in postings over the last 3 years for positions requiring a master's degree

Top Posted Occupations

| Occupation	Total/Unique (Jun 2023 - May 2024)	Posting Intensity	Median Posting Duration
Software Developer / Engineer	273,036 / 84,998	3 : 1	22 days
Registered Nurse	332,698 / 81,081	4 : 1	25 days
Nurse Practitioner	168,965 / 58,165	3 : 1	25 days
Family / School / General Social Worker	161,153 / 52,135	3 : 1	26 days
Healthcare Administrator	156,674 / 50,530	3 : 1	26 days
Project Manager	100,771 / 39,214	3 : 1	24 days
Program Manager	110,334 / 37,440	3 : 1	25 days
Family / Behavioral Therapist	174,306 / 36,338	5 : 1	24 days
Computer Systems Engineer / Architect	112,504 / 35,442	3 : 1	22 days
Speech Language Pathologist	163,038 / 33,908	5 : 1	26 days

Competitor Analysis

Understanding key program features
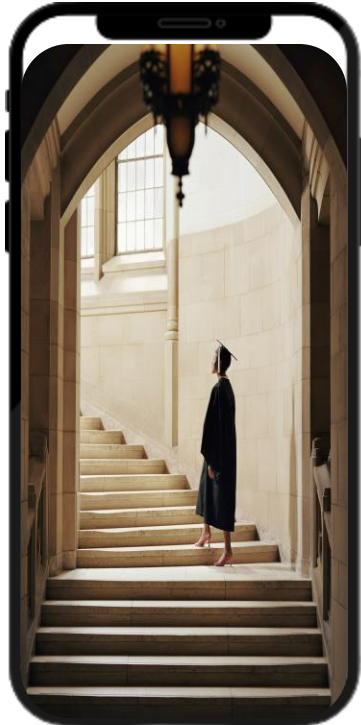
- Curriculum differentiators

- Program features

- Program marketing

- Cost

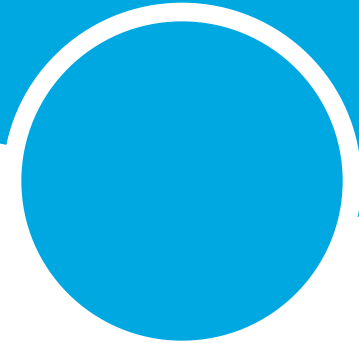- Time to completion

- Term length

- Modality

Primary Market Research – Student & Labor Market

Current programs and new program development

Surveys

Focus Groups
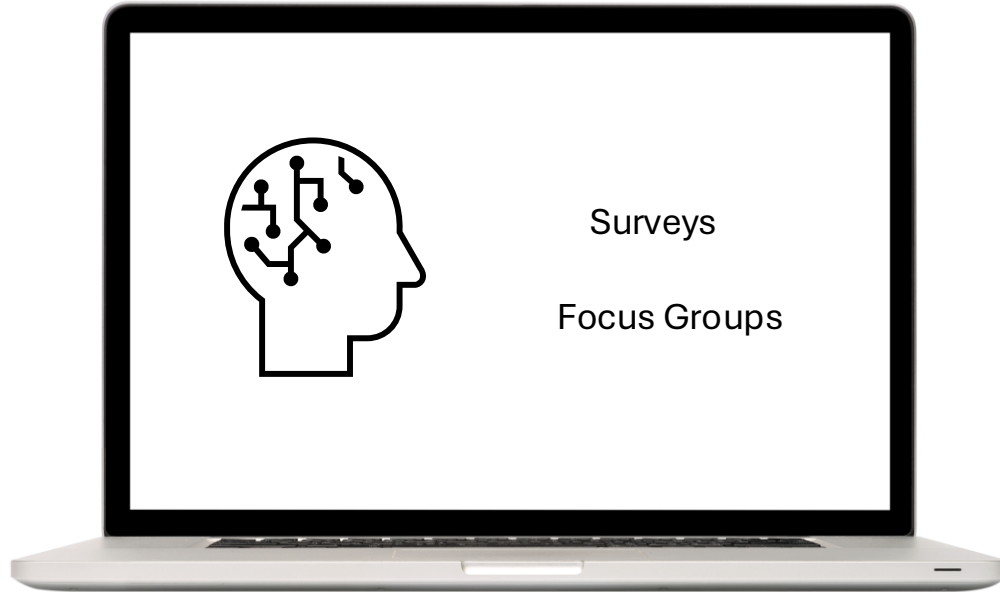
- Artificial Intelligence
  - AI tech
  - AI literacy
  - Machine Learning
- Interdisciplinary programs
  - STEM and Humanities integrated
  - Health Informatics
- Cannabis science/studies
- Game/Media Design

In Academic Planning, the Intersection is Key to Viability

Market Demand:
What students and employers want =
Relevance

Competition:
Unoccupied market positions =
Differentiation

Program:
What we do well =
Authenticity

Aligning to Authenticity

Utilizing internal assets and being aware of challenges
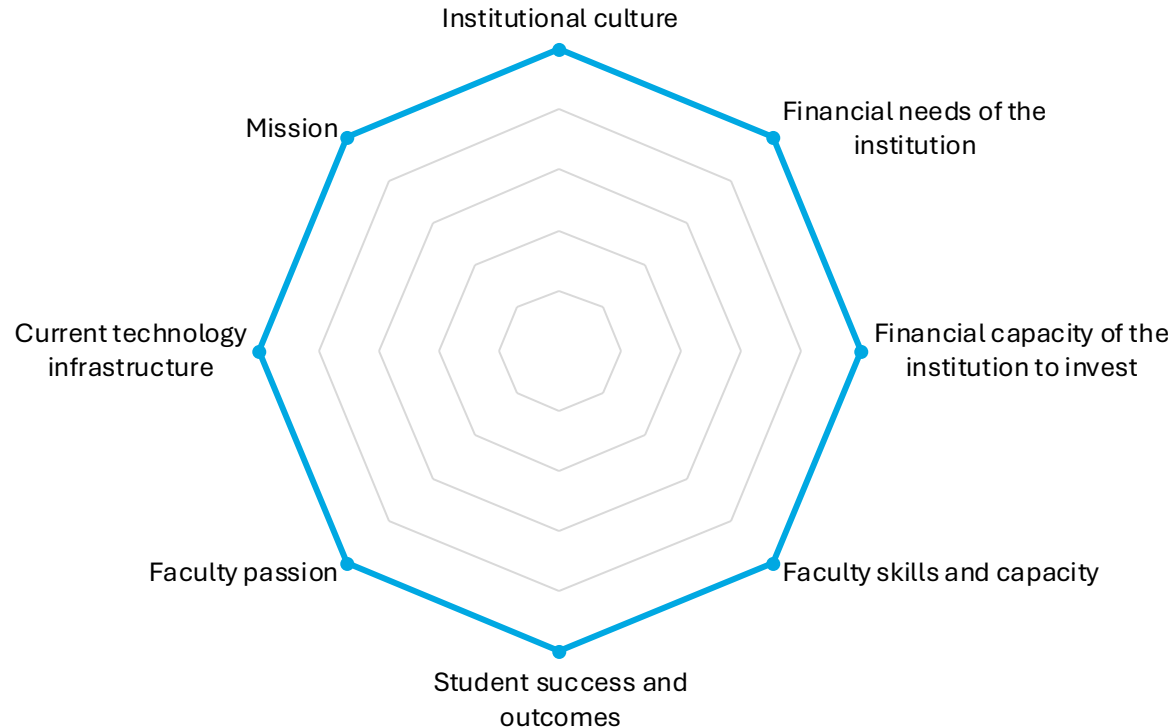
A Program Cannot Be Successful if the Market Doesn't Know it Exists

Strategies for Enhancing Graduate and Online Program

When considering graduate or online programs…

- Attend to institutional culture. And be aware of fear or resistance if present.

- Listen and **lead.**

- Begin with the end in mind. Design programs that are rooted in mission, informed by market data, and are complementary to existing offerings.

- Incorporate market research to assess opportunities that align student interest and labor market needs.

- Develop curricula that use sound andragogy and are optimized for digital learning.

- Create intentional opportunities for graduate and online student engagement and support.

- Demonstrate and articulate value in the market through competitive pricing, outcomes, and established partnerships.

- Be nimble in institutional processes to help get new programs to market in a timely way and be flexible to be able to innovate as needs change.

An Intentional Planning Process which Engages Stakeholders at the Appropriate Time can Design out Many Issues

Issue	Suggested approach
Building programs based on a hunch, interest, or expertise	Utilize available data to test ideas, hunches, and areas of interest against your market. Just because it is viable somewhere doesn't mean it's relevant in your market.
Building programs with little demand	Utilize existing or conduct market research to evaluate student and labor market demand before approving a new program to understand if there is sufficient demand.
Building programs in high-demand fields, but can't compete	Research competitor offerings to identify areas of differentiation. Ensure authenticity and commit to program quality. Understand brand strength in crowded markets.
Making investments in starting new programs, but not in marketing	Involve marketing, enrollment management, and finance in the planning process to ensure there is a plan to fund and promote new offerings. The market positively respond to a new program that it's not aware of.
Building programs based on demand alone	Involve faculty in the process of discerning which programs to consider further. Ensure programs align to mission and are of high quality.

Questions & Discussion

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