Non-traditional Defined

- Part-time Students
- Students who are Financially Independent
- Military Students
- Adult Students (25 or older)
- Place-Bound Students
- Graduate Students
Meet the Adult-Learner Audiences

Careful research shows that adult learners fit into one of four categories. When you create separate recruiting strategies for each market segment, you’re more likely to increase the interest, enrollment, and retention of qualified students in your programs.

Adult learners have high expectations for responsiveness and website resources

### Most Important Contacts and Communications While Searching for More Information

<table>
<thead>
<tr>
<th>Contacts and Communications with a Mean Score of 3 or Higher</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>School’s responsiveness to my inquiries</td>
<td>4.05</td>
</tr>
<tr>
<td>Resources available on the school’s website</td>
<td>3.99</td>
</tr>
<tr>
<td>Email communications from the school</td>
<td>3.71</td>
</tr>
<tr>
<td>Individual communication with faculty in my program of interest</td>
<td>3.66</td>
</tr>
<tr>
<td>Online resources (e.g., search engines, banners, and directories)</td>
<td>3.53</td>
</tr>
<tr>
<td>Recommendations from professionals working in intended area of study</td>
<td>3.44</td>
</tr>
<tr>
<td>Communications with financial aid representatives</td>
<td>3.40</td>
</tr>
<tr>
<td>Information session</td>
<td>3.13</td>
</tr>
<tr>
<td>Mobile-enabled communications from the school</td>
<td>3.08</td>
</tr>
</tbody>
</table>

*Mean scores are based on a 5-point scale, where 5 = extremely important and 1 = not at all important.*

Market Facts

- Approximately 20m students enrolled in college today vs. 12m in 1980 – both traditional and nontraditional growth
- Approximately 17m undergraduates (27% are 25 or older)
- Only 3.6m high school graduates each year
- Half of the adult population are prospective students (74m)
- For-profit universities had rapid growth followed by rapid decline
- Most online students attend colleges within 50 miles of their home
Online Growth Is Credit Positive

Online enrollment continues to grow faster than on campus enrollment
Enrollment at public universities, private nonprofit universities and private for-profit universities.

Scale: 2012 = 100.
Source: National Center for Education Statistics

Moody’s Investor Services, April 2019. Sector In-Depth, Higher Education U.S., Continued growth in online education will intensify competition, shifting market share.
Private not-for-profit universities continue to increase their online enrollment faster than private for-profit and public universities. Exclusively online enrollment. Scale: 2012=100.

Source: National Center for Education Statistics

Moody’s Investor Services, April 2019. Sector In-Depth, Higher Education U.S., Continued growth in online education will intensify competition, shifting market share.
Online Enrollment Bucks Overall Market Trends

Growth in Multimodality an Undergraduate Phenomenon

Online Enrollment Growth at Both Graduate and Undergraduate Level Outpaces Overall Enrollment Changes

Percentage change in student enrollment at four-year, degree-granting institutions by degree-level, 2012-2017

Growing interest in mixing online and face-to-face courses.

Source: EAB analysis of IPEDS data.
Market Growth

A Reason for Optimism?

Growth in Students Age 25-34
2007-2017, NCES

15% All institutions
620K Total students

Growth in Online-Only Students
2013-2017, EAB Research

47% Public 4-years
42% Private non-profit 4-years

Growth in Master’s Conferrals
2007-2017, NCES

25% All institutions
160K Total graduates

More Growth on the Horizon
NCES Projections Through 2026

11% Projected growth students age 25-34
22% Projected growth master’s degrees conferred

Source: IPEDS Database, National Center of Education Statistics; EAB Analysis.
Opportunity Forecast vs. Market Forecast

Nature of Non-traditional Student Market
• Highly disaggregated
• Myopic
• Sensitive to economic swings
• Convenience & price rule non-traditional undergraduate market
• Both regional and national
• Pragmatic
• Non-traditional is increasingly online, but online is not always non-traditional

Easy to forecast the universe of possible non-traditional students, predicting those who will participate is challenging. We can assess what is necessary to compete.
Delivery Models

- Fully online vs hybrid
- Synchronous vs asynchronous
- In-source vs. outsource
- Faculty specific vs. pre-developed
- CBE
- PLA

Most colleges engaging in online don’t know what they don’t know. Recruitment, delivery, support structures, technology, and pedagogy (or andragogy) are all different from what most colleges are accustomed to, and they are often counter-intuitive.
Degree completion/adult learners

Are You Willing to Invest?

Numerous Barriers to Completion

Seven Characteristics of “Nontraditional” Learners put this Population at Risk

- Delays postsecondary enrollment
- Long term nature of part-time enrollment
- Full-time employment while enrolled
- Financially independent for financial aid purposes
- Financially supporting dependents
- Single parent status
- Lacking a traditional high school diploma (earned GED)

A Difficult Market to Enter

1. Challenges to Recruit—And Retain
   - Investments made by largest players create high barriers to entry

2. Credit Transfer—A Complex Process
   - PLA and other measures requires specific competencies and investment of staff time

3. Risk of Winners-Take-All Market—At Least Regionally
   - Less need for differentiation compared to master’s programs
   - Large players can keep investing

Highly Price Sensitive Population

- Earning their own tuition and supporting dependents

Source: “Who is Nontraditional?” NCES, [https://nces.ed.gov/pubs/web/97578e.asp](https://nces.ed.gov/pubs/web/97578e.asp); EAB interviews and analysis.
Large Nonprofit Success Stories

**Western Governors University** – Established as free-standing, multi-state college to offer non-traditional programs and serve non-traditional students

**SNHU** – Broke off online operation from campus-based operation with separate CEO for campus and separate provosts, faculty, admissions, and student service processes and staff

**Purdue** – Purchased Kaplan and maintains separate structure, processes, and policies

**ASU** – Spinning off for-profit operations to support initiatives such as corporate partnerships
Online Success Factors of the Largest Players

• Low per-student instructional costs
• Higher investment in support services
• Minimal barriers to participation
  – Admissions processes
  – Credit assessment and transfer
  – Proactive outreach
  – Low tuition and support for employer reimbursement
• Rapid customer response (inquiry, applicant, student)
• Professional instructional design and consistent look and feel
• Independent governance structure
• Larger marketing spend but spread across larger enrollment (SNHU acquisition cost of $1,134/student in 2018 and $139m in marketing spend)
Most Colleges Don’t Know What They Don’t Know

“If you try to innovate internally the mothership, the incumbent organization sees the new thing as foreign tissue and the traditional university will try to incorporate it in its own image”

Paul LeBlanc –

“Concerns about prestige leads to conservatism – best examples of innovative institutions are those that innovated outside it”

Jonathan Gagliardi –

Financials, structure, and culture are all barriers to innovation.
Online course design shapes the student experience

Impact of online learning on institutional spend is tied to scale


Source: Eduventures analysis of IPEDS data. Private nonprofit, 4-year schools only. Undergraduate and graduate students. Online students refers to “Distance Education” students. “Spend is the aggregate of “Instruction,” “Academic Support,” and “Student Services” Institutional expenditures.
NH Adults Age 25-64 with High School Diploma Only or Some College/No Degree

Highest level of education

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Age 25-34</th>
<th>35-44</th>
<th>44-54</th>
<th>55-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; High Sch Diploma</td>
<td>42 k</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High Sch Diploma</td>
<td>194 k</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College No Degree</td>
<td>133 k</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Degree</td>
<td>77 k</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>172 k</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master's Degree</td>
<td>83 k</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terminal Degree</td>
<td>23 k</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Opportunity? (UG)

Opportunity? (UG)

Opportunity? (GR)
NEW HAMPSHIRE YOUNG ADULT NET MIGRATION FROM OTHER STATES IS INCREASING

Nontraditional market opportunity in NH

## Highest Education Level Across New Hampshire

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Attainment %</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school graduate (including GED)</td>
<td>26.7%</td>
<td>193 k</td>
</tr>
<tr>
<td>9th-12th grade no diploma</td>
<td>16.2%</td>
<td>117 k</td>
</tr>
<tr>
<td>Less than 9th grade</td>
<td>10.8%</td>
<td>310 k</td>
</tr>
<tr>
<td>Some college no credential</td>
<td>24.1%</td>
<td>174 k</td>
</tr>
<tr>
<td>Associate degree</td>
<td>14.4%</td>
<td>92 k</td>
</tr>
<tr>
<td>Bachelor’s degree</td>
<td>51.2%</td>
<td>266 k</td>
</tr>
</tbody>
</table>

Because of rounding, the sum of these percentages may exceed 100.

How are we doing?
Change 2011 to 2017 in New England
Part-time Adults v. All Other Undergrads

Part-time undergraduate enrollment: comparison of 2011 to 2017 change in enrollment of students age 24 to 65 and enrollment of all other undergrads

- Public 4-year sectors across the region lost adult student enrollment over the 7-year period.
- Gains were driven by 4-year privates (NH, CT) and by 2-year sectors (CT, MA).
- Only one state, NH, realized an overall net 7-year gain in adult enrollment, attributable to SNHU.

Note: 15% of SNHU enrollment is counted in NH private 4-year enrollment, combining estimated total on-campus enrollment with enrollment exclusively online by students located in the state.
GSC & UNHM Fall Enrollment – Age Distribution

Source: U.S. Department of Education, IPEDS, Fall Enrollment (headcount).
GSC & UNHM Enrollment

Source: U.S. Department of Education, IPEDS, Fall and 12-Month Enrollment.
New England Public 4-Year Undergraduates

**Degree/certificate seeking**

<table>
<thead>
<tr>
<th>Year</th>
<th>MA</th>
<th>ME</th>
<th>NH</th>
<th>RI</th>
<th>VT</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>25k</td>
<td>20k</td>
<td>15k</td>
<td>10k</td>
<td>5k</td>
</tr>
<tr>
<td>2017</td>
<td>30k</td>
<td>25k</td>
<td>20k</td>
<td>15k</td>
<td>10k</td>
</tr>
</tbody>
</table>

**Nondegree (for-credit continuing ed)**

<table>
<thead>
<tr>
<th>Year</th>
<th>MA</th>
<th>ME</th>
<th>NH</th>
<th>RI</th>
<th>VT</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>10k</td>
<td>10k</td>
<td>10k</td>
<td>10k</td>
<td>10k</td>
</tr>
<tr>
<td>2017</td>
<td>15k</td>
<td>15k</td>
<td>15k</td>
<td>15k</td>
<td>15k</td>
</tr>
</tbody>
</table>

**PRIVATE 4-YR change 2011-2017**

- **Nondegree**
  - CT: -23%
  - MA: -1%
  - ME: +279%
  - NH: +44%
  - RI: -11%
  - VT: +55%

- **Degree**
  - CT: +13%
  - MA: +4%
  - ME: +23%
  - NH: +78%
  - RI: -1%
  - VT: +8%

Source: U.S. Department of Education, IPEDS, Fall Enrollment (headcount).
Note: 15% of SNHU enrollment is counted in NH private 4-year enrollment, combining estimated total on-campus enrollment with enrollment exclusively online by students located in the state.
Exclusively Online Undergrad Enrollment – Distribution among Publics within New England States

**USNH**
- **N = 1396**
- GSC
  - 1370, 98%

**CT Public 4-Yr**
- **N = 1598**
- Charter Oak
  - 1416, 90%

**MA Public 4-Yr**
- **N = 5880**
- UMass Amherst
  - 1287, 22%
- UMass Lowell
  - 2310, 39%
- UMass Dartmouth
  - 558, 10%

**ME Public 4-Yr**
- **N = 3918**
- UMaine Augusta
  - 2027, 52%
- USM
  - 485, 12%
- Ft Kent
  - 499, 13%

**RI Public 4-Yr**
- **N = 416**
- URI
  - 409, 98%

**VT Public 4-Yr**
- **N = 340**
- UVM
  - 158, 46%
- VT Technical
  - 122, 36%
Graduate Market
Graduate Market Facts

- 13% of graduate students are fully online at R1 institutions
- 21% of grad students at R2s are fully online
- 57% of grad students at R3s are fully online
- 40% of grad students at master’s institutions
1. Master’s Degree (34%)
2. Bachelor’s Degree (28%)
3. Doctorate (19%)
4. Undecided (16%)
5. Associate Degree (1%)
6. Certificate Program (1%)
7. Other (1%)
Growth Slowing and Markets Saturating

Uptick in Conferrals and New Program Launches

### Master’s Degree Conferrals Nationwide

<table>
<thead>
<tr>
<th>Year</th>
<th>Conferrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>751,718</td>
</tr>
<tr>
<td>2014</td>
<td>754,582</td>
</tr>
<tr>
<td>2015</td>
<td>758,804</td>
</tr>
<tr>
<td>2016</td>
<td>785,757</td>
</tr>
<tr>
<td>2017</td>
<td>804,684</td>
</tr>
</tbody>
</table>

+7% growth from 2013-2017

### Online Bachelor’s Growth

2013-2017, EAB Research

<table>
<thead>
<tr>
<th>Public 4-year</th>
<th>Private 4-year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students</td>
<td>Programs</td>
</tr>
<tr>
<td>46%</td>
<td>40%</td>
</tr>
<tr>
<td>38%</td>
<td>57%</td>
</tr>
</tbody>
</table>

### Online Graduate Growth

2013-2017, EAB Research

<table>
<thead>
<tr>
<th>Public 4-year</th>
<th>Private 4-year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students</td>
<td>Programs</td>
</tr>
<tr>
<td>46%</td>
<td>58%</td>
</tr>
<tr>
<td>43%</td>
<td></td>
</tr>
</tbody>
</table>

Source: IPEDS Database, National Center of Education Statistics; EAB Analysis.

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Fewer adult learners are taking graduate admissions tests

New England Graduate Enrollment

**Public 4-Year Headcount**

- NH: -24%
- ME: -15%
- RI: -16%
- VT: +3%

**Private 4-Year Headcount**

- CT: +10%
- MA: +7%
- ME: +56%
- NH: +68%
- RI: +2%
- VT: −1%

**USNH 12-Month Graduate FTE**

Source: U.S. Department of Education, IPEDS, Fall Enrollment (headcount).

Note: 15% of SNHU enrollment is counted in NH private 4-year enrollment, combining estimated total on-campus enrollment with enrollment exclusively online by students located in the state.

Change in total New England public and private 4-year graduate enrollment 2011 to 2017:

+5% or 13 k headcount
Graduate Students Enrolled Exclusively Online
New England Public 4-Year

Grad Students Enrolled Exclusively Online as a Share of Total Grad Student Enrollment

Graduate enrollment online has outpaced the change in campus and hybrid enrollments.

Source: U.S. Department of Education, IPEDS, Fall Enrollment (headcount).
Graduate Enrollment – Headcount, Online, FTE

New England 4-Yr Public TOTAL Grad Headcount

- NH: -24%
- ME: -15%
- RI: -16%
- VT: +3%

change 2011-2017

0 10 k
5 k

FY11 12 13 14 15 16 17

-10% CT 16 k (2017) -3% MA 43 k (2017)

USNH Exclusively ONLINE Grad Headcount

KSC 20 (2018)

470
326
239

Fall12 13 14 15 16 17 18

USNH TOTAL Grad FTE

Source: U.S. Department of Education, IPEDS, Fall Enrollment (headcount).
Exclusively Online Graduate Student Enrollment – Distribution among Publics within New England States

- **USNH**
  - N = 914
  - GSC: 222, 24%
  - UNH: 382, 42%
  - PSU: 307, 34%

- **CT Public 4-Yr**
  - N = 934
  - UConn: 588, 63%
  - UNH: 382, 42%
  - PSU: 307, 34%

- **MA Public 4-Yr**
  - N = 7538
  - UMass Amherst: 2328, 31%
  - UMass Boston: 840, 11%
  - Fitchburg: 1300, 17%
  - UMass Lowell: 1791, 24%

- **ME Public 4-Yr**
  - N = 770
  - USM: 294, 38%
  - UMaine Orono: 378, 49%

- **RI Public 4-Yr**
  - N = 343
  - URI: 330, 96%

- **VT Public 4-Yr**
  - N = 163
  - UVM: 120, 74%
  - Castleton: 38, 23%
What is needed to compete?

- Cohesive systemwide strategy
- Leveraging of delivery economies
- Leveraging of cross-campus expertise
- We do have strengths and capacities we can build on, and we also have gaps
  - Instructional design team at GSC
  - Content expertise across the system
  - Centralized call center infrastructure
Enrollment Center
# OEC Service Reach

## Financial aid
- *Missing Document Collection*
- *FAFSA Completion Coaching*
- Live Chat
- Support for Granite Guarantee initiative

## Student Account Services
- *Outstanding balances follow up*

## Inquiry Cultivation
- Purchased List
- *Email/text invitations to Open House*
- *Email/text invitations to HS Fairs*

## Retention
- *Surveys (Concerns, Drops, Midterm)*
- *Re-registration completion*

## Enrollment Targeted Support
- Realtime Dashboards
- Data Sharing between departments
- Admissions Process workflows

## Admissions
- Public Promise
- *Inquiry through completed application and enrollment*
- *Appointment Setting for Counselors*
- Lost List, Non-completer, Push to Deposit, Open House, Campus Visit, HS Counselor Visit
- Live Chat

## Alumni Relations
- *Homecoming Events – Email/text invitations*
- *Donation opportunities and reminders*

## Surveys
- Recent graduates
- Retention
- Workforce / Employment

## Marketing
- SEO Optimization / SEM Management
- *Targeted program lead generation*
State of the Art Capabilities

• Outreach
  – Click to Dial Calling
  – Mass Text
  – Voicemail Drop
  – Ringless Voicemail
  – Live Chat capability
  – Forms / Lead Generation
  – Survey
  – Prospect Data Sharing between campuses
  – Email

(Operating Technology Stack - TargetX, SMS Magic, Salesforce, Banner, Colleague, Tableau, PowerBI, Five9, Stratics, Phonevite, Forms Assembly, Informatica Cloud)

• Expanded Hours of Operation
  M-Th 8:30 am to 7:00 pm
  Fri 8:30 am to 4:30 pm
  Sat 9:00 am to 12:00 pm
Metric Capabilities

- Speed to Lead / Contact Engagement: < 4 hours on all customer inquiries
- Average outreach per day: 800 records
- Sept: 30,000 contacts & successful outreach attempts (using all contact methods)
- 15% Improved admissions engagement and handoffs

Current Engagements

CCSNH: Nurture unfinished application leads; nurture admits who have not registered
Guide Graduate students to placement within USNH programs

KSC: Safety & Occupational Health Applied Sciences Grad program – cultivation from inquiry to enrollment – 30% conversion rate since 10/1
Email outreach – 2000 per week to invite attendance to high school admissions visits

UNH Law: Online Spring Graduate Programs – cultivation from inquiry to enrollment

PSU: Undergraduate and graduate programs – cultivation from inquiry to enrollment
Nurture unfinished applications and FAFSA docs
Conclusions

• Non-traditional undergraduate and graduate markets are rapidly transitioning to fully online.
• Degree completion primarily driven by price, convenience, and time to completion.
• Graduate market is more polarized around price vs. reputation.
• Failing to compete online is ceding both graduate and adult markets.
• Getting it wrong will be costly – need to be thoughtful of delivery & support infrastructure, content, policies, enrollment management, and oversight.
  – Insource or outsource?
  – Redesign or recreate?