Decoding the Data: A Dual Lens on Higher Education Market Trends That Matter from an Enrollment and Academic Viewpoint

RNL NC
ALTERING the LANDSCAPE

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Today's Presenters

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The Big Challenge

Drowning in Data, Starving for Insight

Overwhelming data sets across campus

- Who collects it?
- How is it reported and shared to stakeholders?
- Where does IR fall on the org chart?

Academic and enrollment silos

- Same data, different story
- Institutional mission, unique assignments
- Opportunities for collaboration

Legacy programs misaligned with market demands

- Program Viability Metrics
- External Data – Third Party Audit
- Fiscal Responsibility

"Data is not just about numbers; it's about insights. Insights inform the decisions that shape enrollment outcomes and align them with the institution's mission."

— Chapter 3: Data and Environmental Scanning

SEP
Strategic Enrollment Planning
A Dynamic Collaboration

Higher Education Landscape

Recent Higher Ed Headlines

June closings: Siena Heights won't 'be the last' small college to close

Administration

By: **Alcino Donadel**   Date: **July 2, 2025**

Hartford Courant   + Follow   9.1K Followers

CT colleges and universities face deep cuts: 'We have depleted faculty and staff'; 'What a tragedy'

Story by Livi Stanford, Hartford Courant • 1w • 🕐 5 min read

IHE Inside Higher Ed

● June 03, 2025

May Brought Deep Cuts at Multiple Colleges

Colleges laid off well over 800 employees last month due to a mix of enrollment challenges and state funding issues. Ivy Tech saw the deepest cuts with more than 200 jobs axed.

By Josh Moody

Higher Education Institutional Finances Continue to Deteriorate
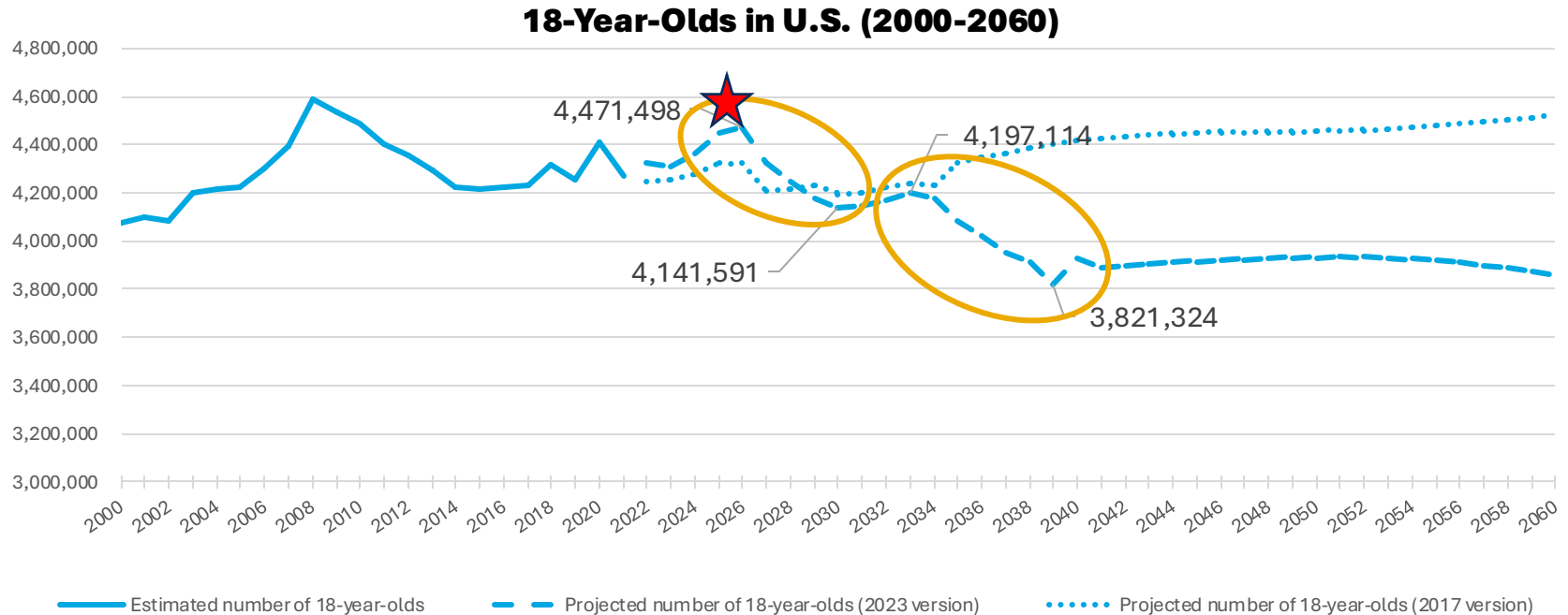
June 25, 2024 | Higher Education

Jul 7, 2025 - Education

BU lays off 120 amid federal spending cuts

Steph Solis

We are on the cusp of TWO demographic cliffs

18-Year-Olds in U.S. (2000-2060)

Legend:
— Estimated number of 18-year-olds
- - Projected number of 18-year-olds (2023 version)
···· Projected number of 18-year-olds (2017 version)

Data labels: 4,471,498 · 4,197,114 · 4,141,591 · 3,821,324

Projected Change in High School Graduates

United States 2017-36

Fall 2025

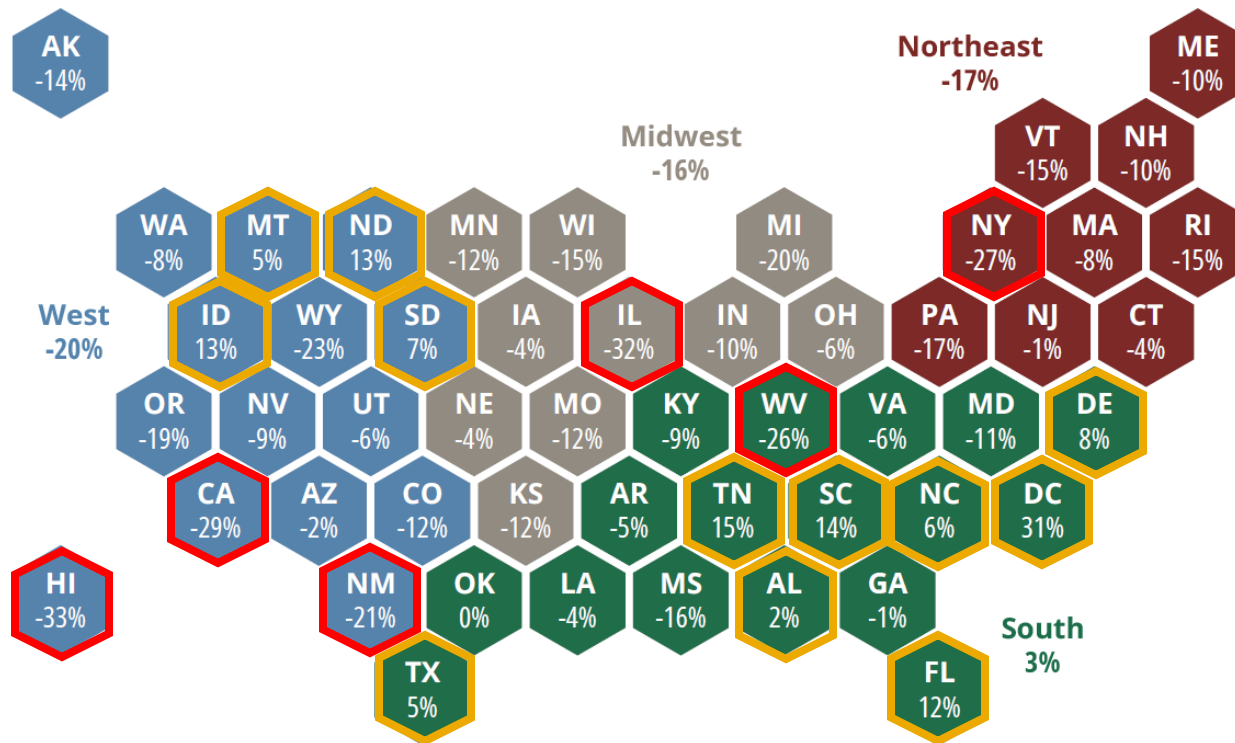| School Year	Public Schools	Hispanic	White	Black	American Indian/Alaska Native	Asian/Pacific Islander	Two or More Races	Total Public SOC's
2021-22	3,370,560	883,750	1,655,320	458,630	29,400	219,550	125,190	1,716,520
2026-27	3,454,240	987,990	1,564,100	485,950	28,110	226,100	171,590	1,899,740
2031-32	3,358,850	938,950	1,495,370	458,070	24,360	255,420	192,800	1,869,600
5 yr Change	2.5%	11.8%	-5.5%	6.0%	-4.4%	3.0%	37.1%	10.7%
10 yr Change	-0.3%	6.2%	-9.7%	-0.1%	-17.1%	16.3%	54.0%	8.9%

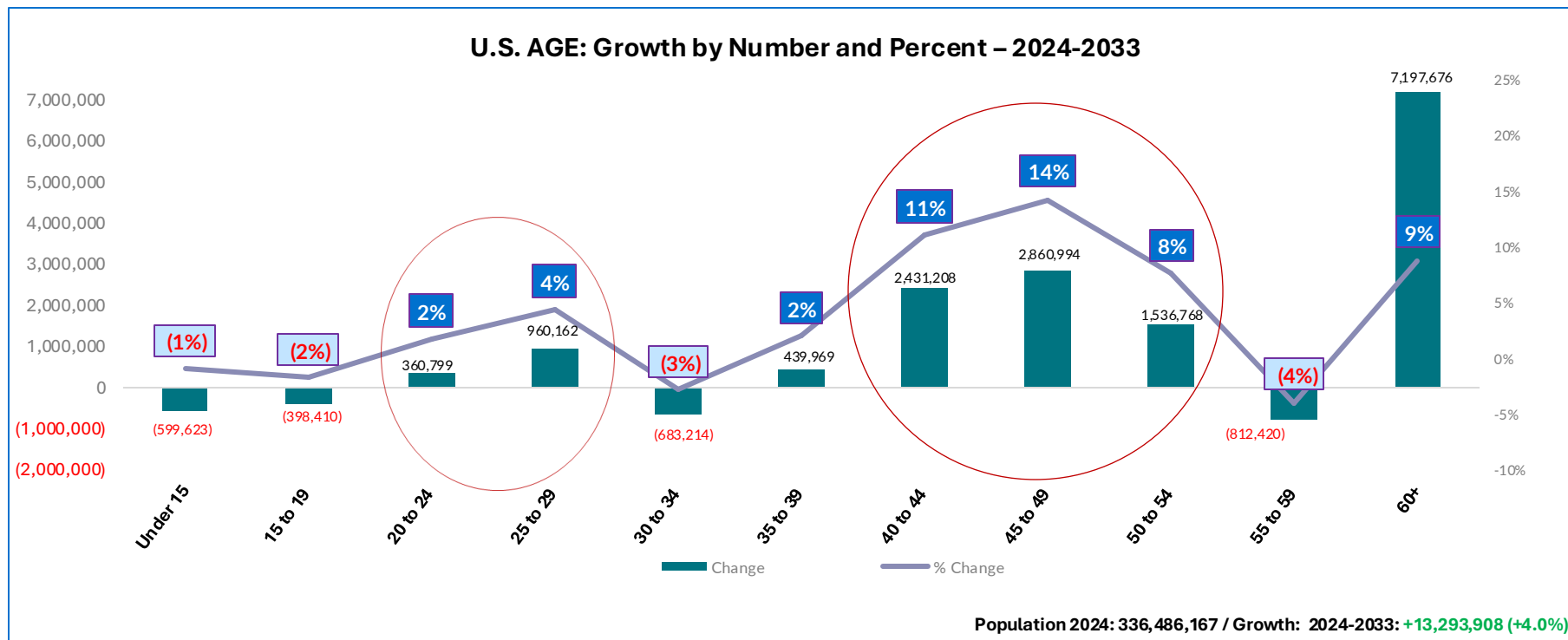# 38 states will see contractions in HS graduates

...the U.S. is no longer increasing the proportion of students that graduate from HS.

Figure 17. Projected percent change in high school graduates, 2023 to 2041

*Source: *Knocking at the College Door: Projections of High School Graduates*. Western Interstate Commission for Higher Education. December 2024

RNL National Conference   8

Institutions prepared to serve adults have an opportunity.

...while trends will vary by region, institutions fully prepared to meet the needs and expectations of adults beyond traditional college age will have an opportunity over the coming decade.

U.S. AGE: Growth by Number and Percent – 2024-2033

Age Group	Change	% Change
Under 15	(599,623)	(1%)
15 to 19	(398,410)	(2%)
20 to 24	360,799	2%
25 to 29	960,162	4%
30 to 34	(683,214)	(3%)
35 to 39	439,969	2%
40 to 44	2,431,208	11%
45 to 49	2,860,994	14%
50 to 54	1,536,768	8%
55 to 59	(812,420)	(4%)
60+	7,197,676	9%

Legend: ▬ Change ▬ % Change

Population 2024: 336,486,167 / Growth: 2024-2033: +13,293,908 (+4.0%)

Source: Lightcast, December 2024 (Lightcast data sources).

Leveraging Data to Foster Collaboration

Enrollment Management:
- Inquiry Source
- Applicant Volume
- Admit Rate (Selectivity)
- Yield Rate
- Campus Visit Conversion Rate
- Academic Profile of Incoming Class
- Net Tuition Revenue Total
- NTR per student (New vs Transfer)
- Discount Rate
- Pell Grant Recipient %
- Headcount / FTE Enrollment
- Melt Rate
- Stop-Out Rate
- Cost per Enrolled Student
- First-Gen Rate
- HSI Qualifications

Institutional Data:
- Operating budget
- Revenue sources
- Student expenditures
- Faculty ratio
- Staff count
- Faculty diversity
- Tenure status
- Facility backlog
- Space utilization
- Tech investment
- Library usage
- Clery reports
- FERPA audits
- IT tickets
- Parking usage
- Title IX cases
- IPEDS reporting

Academic Affairs:
- Student Employment
- Internship Participation
- Alumni Giving Rate
- Default Rate
- Facility Usage
- Student Satisfaction
- Retention Rate
- Graduation Rate
- Average GPA
- Academic Profile
- Student Satisfaction
- Time to Degree
- Career Outcomes
- Job Placement Rate
- Grad School Placement Rate

Higher Education

*"The **academic enterprise** is the heart of an institution, but **enrollment** is its lifeblood. Colleges and universities with **integrated planning processes**... are best positioned to meet the challenges of the contemporary higher education landscape."*

*-Chapter 6, Strategic Enrollment Planning, A Dynamic Collaboration*

Corporate America

*"**Product/market fit** means being in a good market with a product that can satisfy that market."*

-Marc Andreessen (Entrepreneur & Venture Capitalist) coined the term and this definition is widely referenced

RNL Research & Market Trend Reports

Providing Higher Education Comprehensive White Papers on all Market Segments
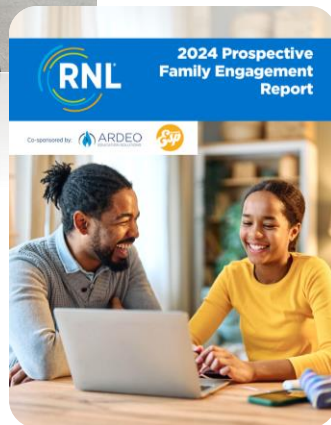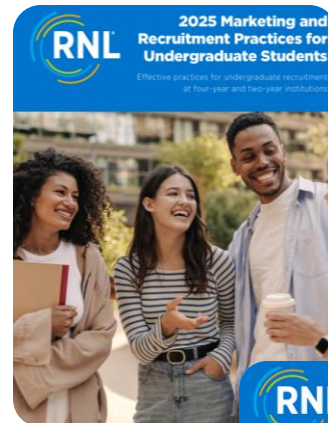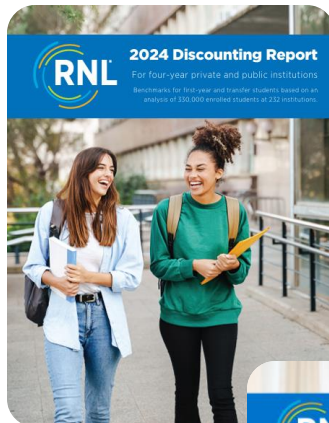
Is Your Academic Portfolio Aligned with the Market?

Question

Why It Matters

1. Do you know which of your current programs are driving inquiry and enrollment and which are not?

Institutions often carry underperforming programs without reviewing demand trends.

2. Have you validated student demand and labor market need for your proposed or existing programs?

Product-market fit requires more than internal interest, it needs external validation.

3. Are your programs clearly differentiated from competitor offerings in your region or niche?

Market saturation can stifle enrollment; differentiation is key to standing out.

4. Do you have a shared, cross-functional process between enrollment and academic affairs to review program performance and viability?

Collaboration enables faster, data-informed decisions about program investment, sunsetting, or repositioning.

5. Do your program formats, delivery methods, and value propositions reflect how today's students prefer to learn?

A strong product-market fit includes modality (online, hybrid, etc.), pricing, and outcomes relevance.

1. Which Programs Drive Enrollment and Which Don't?

Best Practices:

- Analyze admissions funnel data by program for each stage:
  - Inquiry → Application → Admit → Deposit → Enroll
- Identify programs with strong early interest but low yield (indicates a message or value gap).
- Examine trends over 3–5 years to spot sustained interest vs. short-term spikes.
- Segment by population (first-year, transfer, graduate, adult learners) for deeper insight.
- Use student search and digital marketing engagement data to determine program-level awareness and interest.

Action Steps:

- Create dashboards by program and degree level.
- Rank programs by contribution to net tuition revenue.
- Evaluate cost-to-educate vs. enrollment revenue.

Collaboration:

- Admissions + Institutional Research + Academic Deans

Leading master's programs have changed in last 5 years

15 Largest Master's Degree Subjects (2019)	
Business Administration	107,300
Social Work	29,386
Education	20,368
Accounting	19,723
Educational Leadership/Administration	19,421
Registered Nursing	16,627
Curriculum and Instruction	15,309
Family Practice Nursing	12,724
Computer Science	12,592
Public Administration	**12,178**
Special Education	11,709
Computer and Information Sciences	11,339
Electrical Engineering	**11,251**
Counselor Education/School Counseling	**11,047**
Public Health	10,142

15 Largest Master's Degree Subjects (2023)	
Business Administration and Management	104,829
Social Work	34,512
Computer Science	22,201
Management Science	**21,993**
Registered Nursing	20,288
Computer and Information Sciences	18,308
Educational Leadership/Administration	18,176
Curriculum and Instruction	17,249
Management Sciences & Quantitative Methods	**15,331**
Accounting	14,423
Education	14,044
Special Education and Teaching	14,006
Health Care Administration/Management	**13,364**
Family Practice Nursing	13,013
Public Health	12,220

- **3 programs have dropped off the list**
- 3 programs have dropped in rank and volume

- 3 programs have risen in rank and volume
- **3 programs have risen onto the list**
- 3 programs have dropped in rank, but grown

2. Have you validated demand and job market alignment?

Best Practices:

- Use labor market analytics tools (e.g., Lightcast, JobsEQ) to:
    - Identify growth sectors in your region and nationally.
    - Map skills taught in programs to job postings and employer needs.

- Analyze alumni outcomes:
    - Career placements, grad school attendance, salary data.

- Conduct surveys/interviews with employers in target industries.
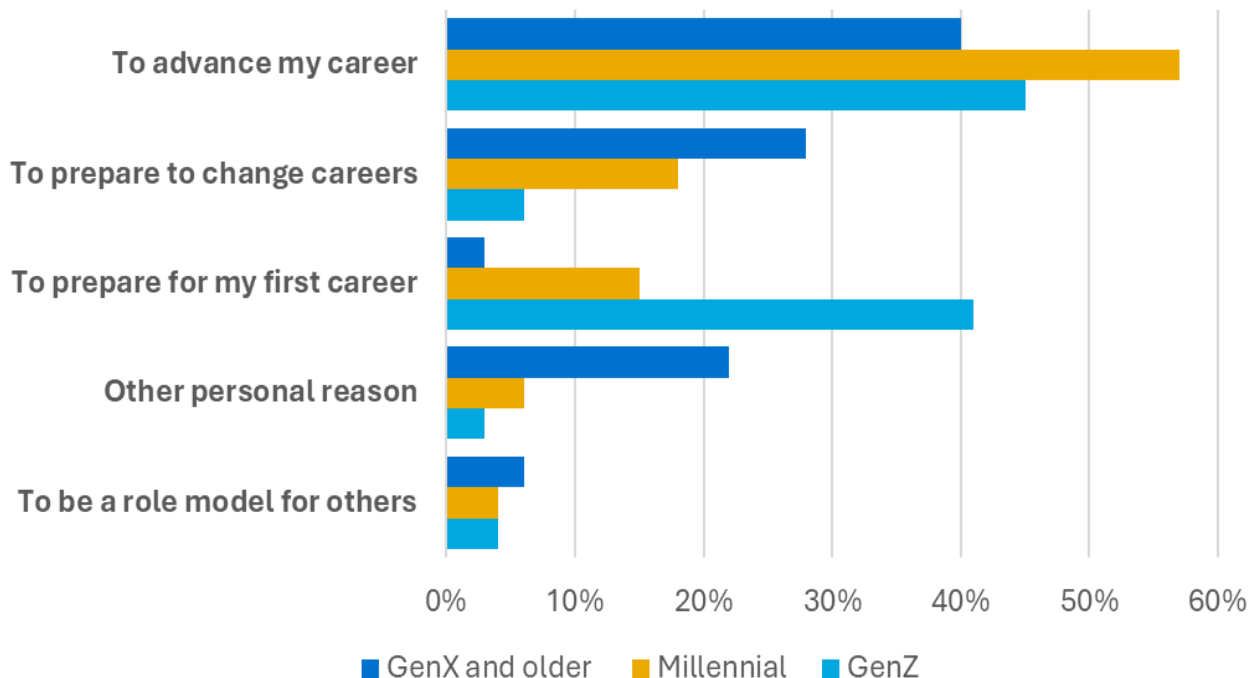
Action Steps:

- Develop a program-level market demand heat map.
- Create a scorecard for each program (e.g., demand score, competition, outcomes).
- Align program review or new program development with job market data.

Collaboration:

- Career Services + Institutional Research + Employer Advisory Boards

Place career preparation at the core of positioning – and curriculum

Chart: Reasons for enrolling by generation

- To advance my career
- To prepare to change careers
- To prepare for my first career
- Other personal reason
- To be a role model for others

Legend: ■ GenX and older ■ Millennial ■ GenZ

X-axis: 0% 10% 20% 30% 40% 50% 60%

90+ percent of students enroll for career reasons. Programs that emphasize career readiness, skill development, and workplace outcomes will appeal to students and offer an avenue for academic innovation.
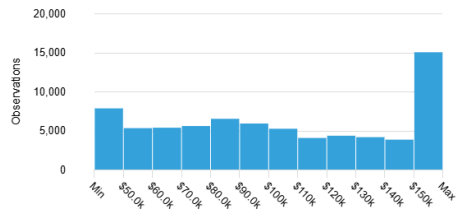
Understanding the Labor Market

Advertised Salary

There are 73,082 advertised salary observations (35% of the 205,894 matching postings).

$100.3K
Median Advertised Salary

Top Industries

Industry	Total/Unique (Jun 2024 - Jun 2025)	Posting Intensity	Median Posting Duration
Offices of Physicians (except Mental Health Specialists)	43,988 / 13,604	3 : 1	25 days
Commercial Banking	15,722 / 6,191	3 : 1	24 days
Engineering Services	12,406 / 5,513	2 : 1	30 days
Colleges, Universities, and Professional Schools	14,543 / 5,309	3 : 1	29 days
Custom Computer Programming Services	9,781 / 5,005	2 : 1	20 days
Administrative Management and General Management Consulting Services	8,070 / 4,149	2 : 1	22 days
General Medical and Surgical Hospitals	9,881 / 3,619	3 : 1	21 days
Elementary and Secondary Schools	9,972 / 3,607	3 : 1	28 days
Computer Systems Design Services	4,683 / 2,991	2 : 1	18 days
Offices of Certified Public Accountants	5,078 / 2,689	2 : 1	28 days

Top Companies Posting

Company	Total/Unique (Jun 2024 - Jun 2025)	Posting Intensity	Median Posting Duration
Wellstar Health System	16,599 / 5,627	3 : 1	24 days
Piedmont Healthcare	16,431 / 4,633	4 : 1	26 days
Emory Healthcare	9,297 / 2,448	4 : 1	24 days
Deloitte	3,794 / 2,131	2 : 1	22 days
Truist Financial	4,954 / 2,095	2 : 1	24 days
Cox Communications	3,064 / 1,999	2 : 1	13 days
Cox Automotive	4,561 / 1,856	2 : 1	15 days
Northside Hospital	4,934 / 1,480	3 : 1	25 days
Elevance Health	4,390 / 1,419	3 : 1	23 days
Google	4,033 / 1,161	3 : 1	28 days

Top Specialized Skills
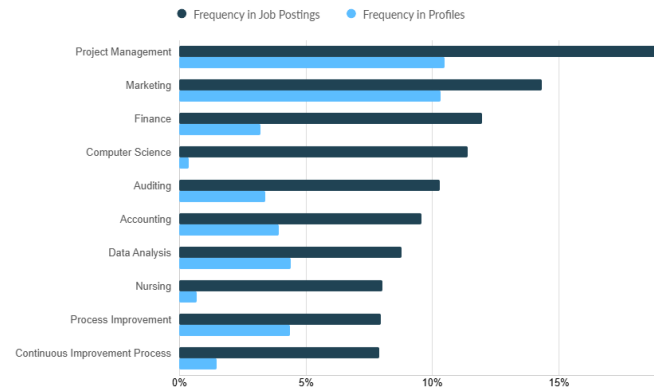
3. Are your programs meaningfully differentiated?

Best Practices:

- Audit competitor institutions (program features, messaging, outcomes).
- Identify what makes your programs distinct:
    - Faculty expertise, embedded experiential learning, industry partnerships.
    - Unique interdisciplinary approaches or co-curricular integration.
- Evaluate whether your value proposition is clearly communicated in digital content and marketing materials.

Action Steps:

- Conduct a SWOT analysis by program.
- Survey students to understand perceived program value and uniqueness.
- Refresh academic program pages with outcome-driven, SEO-optimized content.

Collaboration:

- Marketing + Faculty + Enrollment + Alumni Relations

Expectations Have Changed.

Technology (increasingly powered by AI) has changed today's students, and they expect higher ed to keep up.

- **Professionalized, digitized processes**
- **Focus on ROI (of their studies)**
- **Need for speed**
- **Meaningful connections**
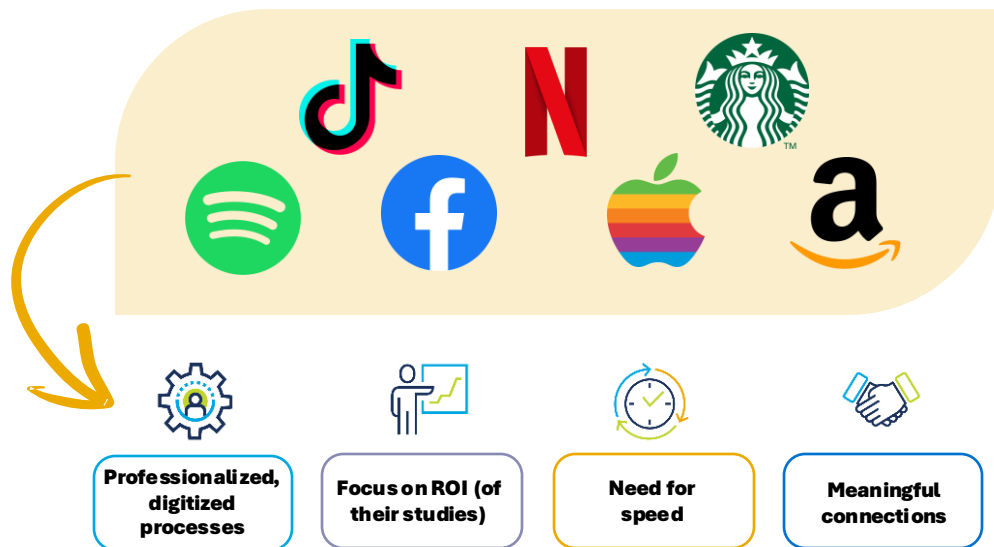
Generations Have Shifted

Graduate and online education is now dominated by Millennials and GenZ.

65%
Percent of graduate students that are Millennials

47%
Percent of online students that are Millennials

Understanding program strength

Matrix position helps us know which questions to ask to build a portfolio strategy

High Demand

Growth opportunities

- **Why is share low?**
  - Is the program known?
  - Have we promoted that we offer it?
- **Do competitors have better offerings?**
  - What features do we lack?
- **What are our options to form a competitive advantage?**
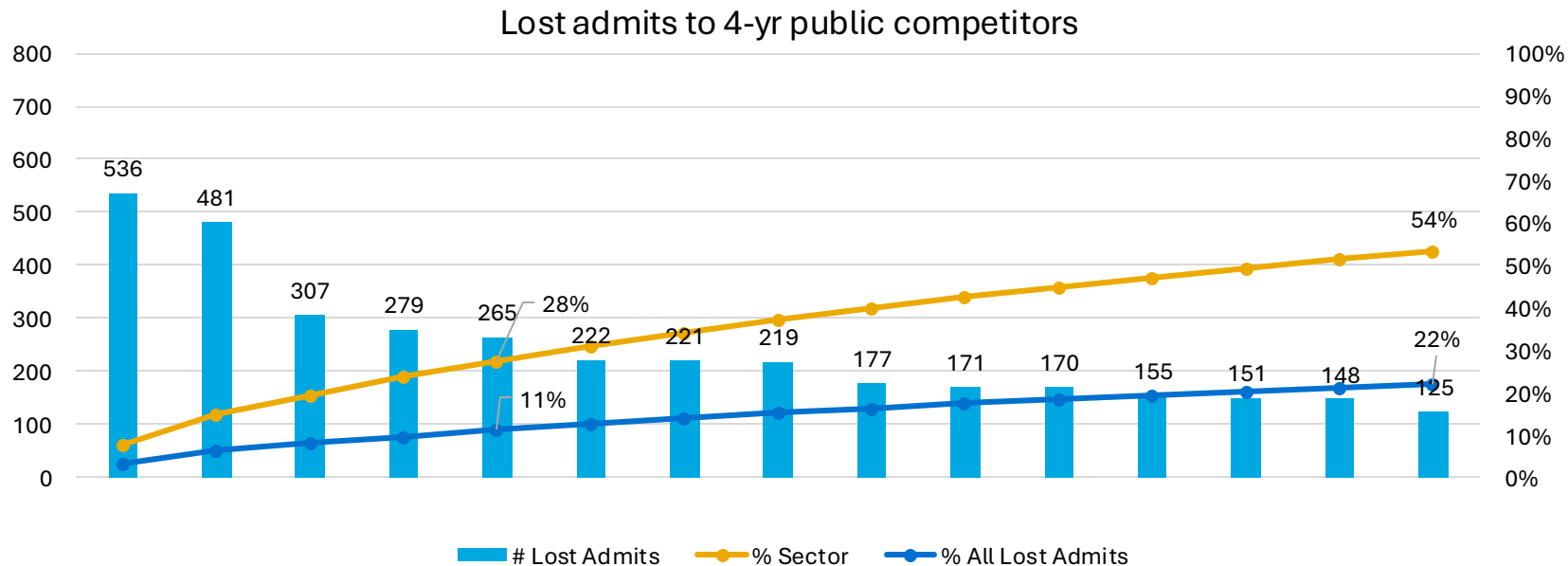- **How does our distinction have value/benefit to a prospective student?**

Strongest position for growth

- **Why are we doing well?**
  - What are the reasons why we have been successful?
  - How do we leverage these advantages and protect our leadership position?
- **Are there related programs where we can extend and succeed?**
- **Who are the competitors growing in this area?**
  - How will they attack our position?
  - How can we sustain our edge?

Low Share

High Share

Least opportunity for growth

- **Why is share low?**
  - Is the program known?
  - Have we promoted that we offer it?
  - Do competitors have better offerings? What features do we lack?
- **Why is demand low?**
  - Is this a new growth field?
  - Is this a field with declining interest?
  - Realistically, are we in a position to reshape or create new demand streams?
- **Is the program being managed sustainably?**

Niche programs

- **Why is demand low?**
  - Is this a new growth field?
  - Is this a field with declining interest?
  - Realistically, are we in a position to reshape or create new demand streams?
- **Why have we been successful attracting students?**
- **Is the program being managed sustainably?**

Low Demand

Understanding Competitors

22% all lost admits from top 15 public 4-year competitors

Lost admits to 4-yr public competitors

Legend: # Lost Admits — % Sector — % All Lost Admits

Bar values: 536, 481, 307, 279, 265, 222, 221, 219, 177, 171, 170, 155, 151, 148, 125

% Sector line annotations: 28%, 54%
% All Lost Admits line annotations: 11%, 22%

4. Do academic and enrollment teams share review processes?

Best Practices:

- Establish regular joint meetings (semesterly or quarterly) between academic and enrollment leaders to:
  - Review funnel and performance data.
  - Assess program health, plan future marketing efforts.

- Collaborate on program launch or retirement decisions.

- Involve enrollment and marketing leaders in academic program reviews.

Action Steps:

- Create shared dashboards for transparency.
- Include enrollment KPIs in annual program reviews.
- Develop a "Program Health Report Card" template co-owned by academics and enrollment.
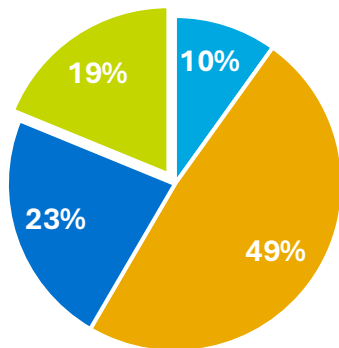
Collaboration:

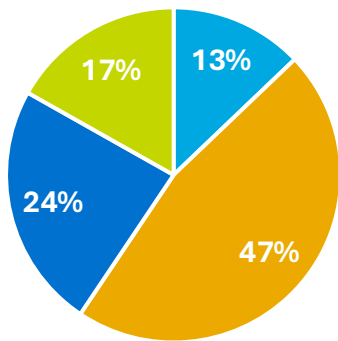- Provost's Office + Deans + Enrollment Management + Marketing

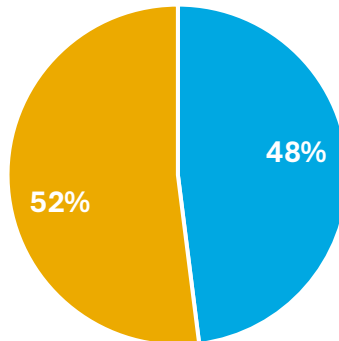# Align programs with student needs - Graduate

Course Length

- 10%
- 49%
- 23%
- 19%

Legend:
- 5 weeks or less
- 6 - 9 weeks
- 10 - 12 weeks
- 13+ weeks (full semesters)

Number of Courses

- 13%
- 47%
- 24%
- 17%

Legend:
- 1
- 2
- 3
- 4+

Status

- 48%
- 52%

Legend:
- Full-Time
- Part-Time

With the level of choice available to graduate students today, your offerings must align with how students want to study.

They indicate that they need: shorter courses, the ability to take multiple courses at the same time, and many are stacking shorter courses together to qualify as full-time students.

Institutions should also be considering offering stackable short credentials that can add up to a master's degree.

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5. Are formats and delivery aligned with student preferences?

Best Practices:

- Survey prospective and current students about preferred formats (in-person, hybrid, online).
- Review enrollment by modality and time of day.
- Analyze stop-out data to determine if flexibility could support re-engagement.
- Benchmark competitors offering accelerated, online, or modular programs.

Action Steps:

- Pilot flexible delivery in high-potential programs.
- Assess technology infrastructure and faculty readiness for online/hybrid delivery.
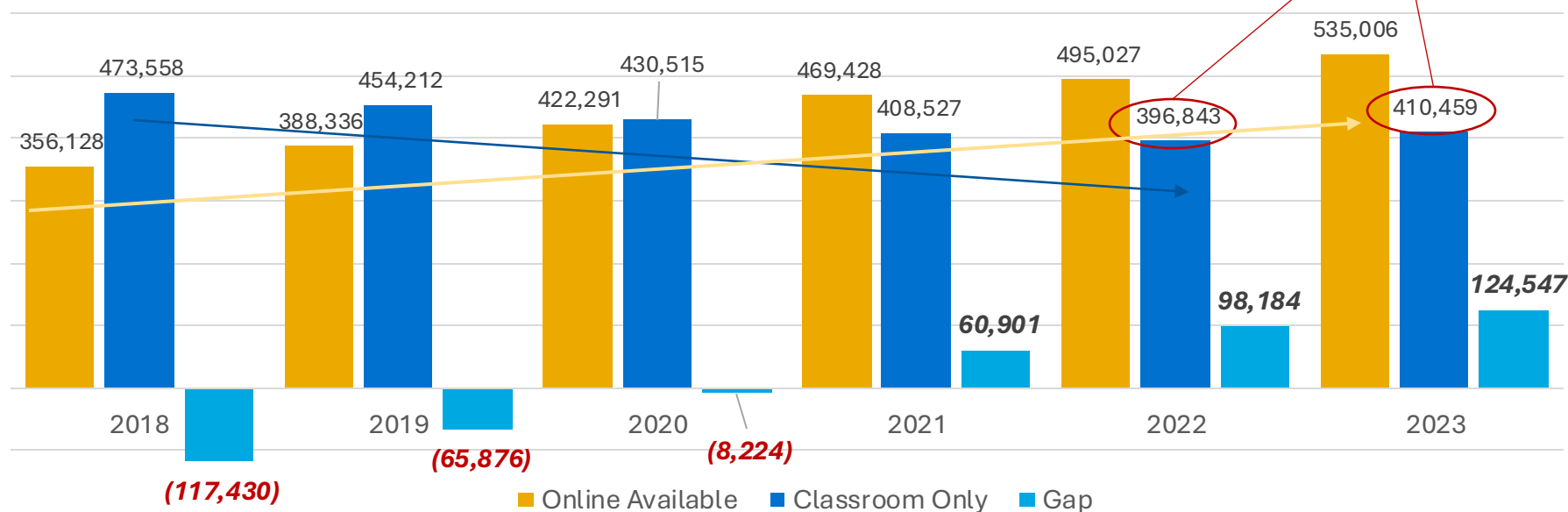- Regularly revisit course scheduling and modality mix.

Collaboration:

- Registrar + Instructional Design + Enrollment + Continuing Ed

Online programs are driving graduate growth

Graduate Degree Production by Format

Chart: Graduate Degree Production by Format, by year.

Year	Online Available	Classroom Only	Gap
2018	356,128	473,558	(117,430)
2019	388,336	454,212	(65,876)
2020	422,291	430,515	(8,224)
2021	469,428	408,527	60,901
2022	495,027	396,843	98,184
2023	535,006	410,459	124,547

Legend: Online Available — Classroom Only — Gap

Academic Portfolio Market Alignment Maturity Model

Stage	Description	Key Characteristics
1. Reactive	Programs are added or maintained based on faculty interest, tradition, or anecdotal feedback.	No formal market research; low visibility into program performance; siloed decisions.
2. Aware	Leadership recognizes the need to evaluate program viability but lacks tools or buy-in.	Limited data access; occasional collaboration; early-stage dashboards or ad hoc reports.
3. Informed	Regular review of program enrollment trends and basic market data informs decisions.	Use of IPEDS, labor data, competitor scans; academic and enrollment teams engage periodically.
4. Aligned	Program development and marketing are co-led by academic and enrollment strategy, with clear data inputs.	Shared governance structure; integrated dashboards; proactive program innovation.
5. Strategic	Academic portfolio functions like a product portfolio: regularly assessed, positioned, and resourced based on dynamic market intelligence.	Data-driven culture; scenario planning; clear sunset/launch criteria; agile, market-responsive offerings.

Questions and Discussion

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