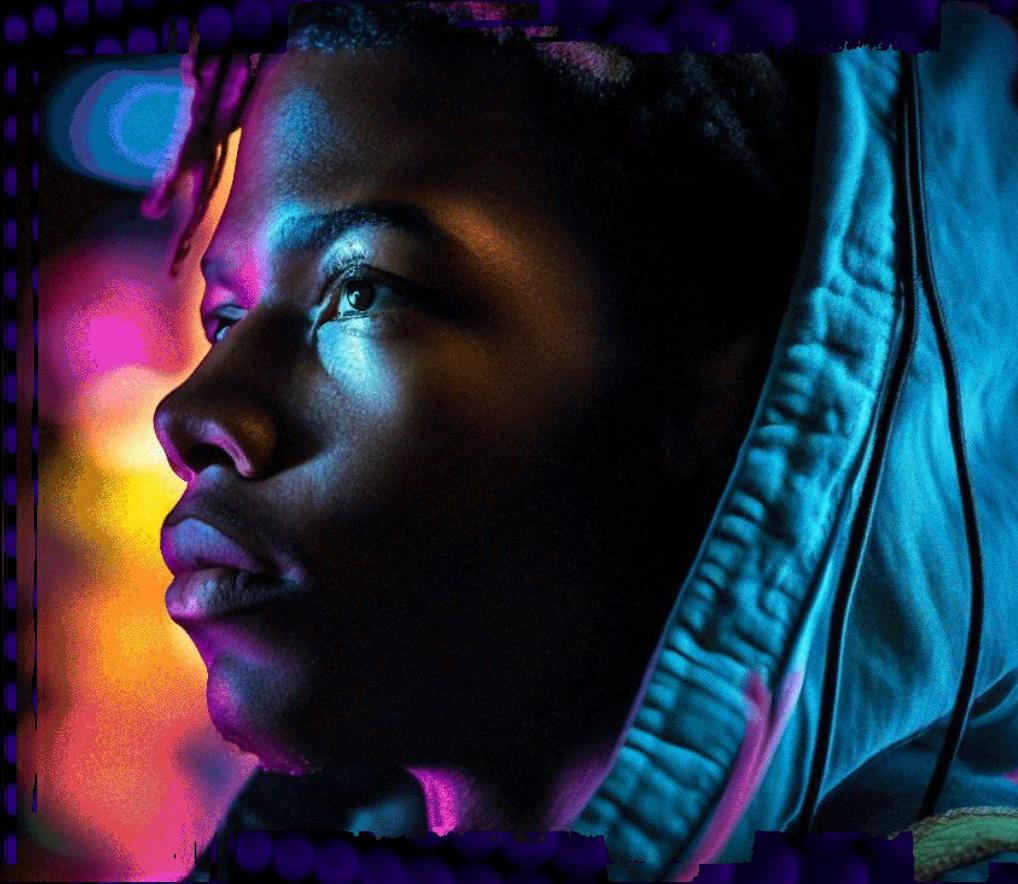


THINK STUDENT LIVE

HIGHER
EDUCATION
IN THE AGE OF AI

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THE CHANGING STUDENT DEMOGRAPHIC:

Embracing the Non-traditional
Student Journey

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WELCOME



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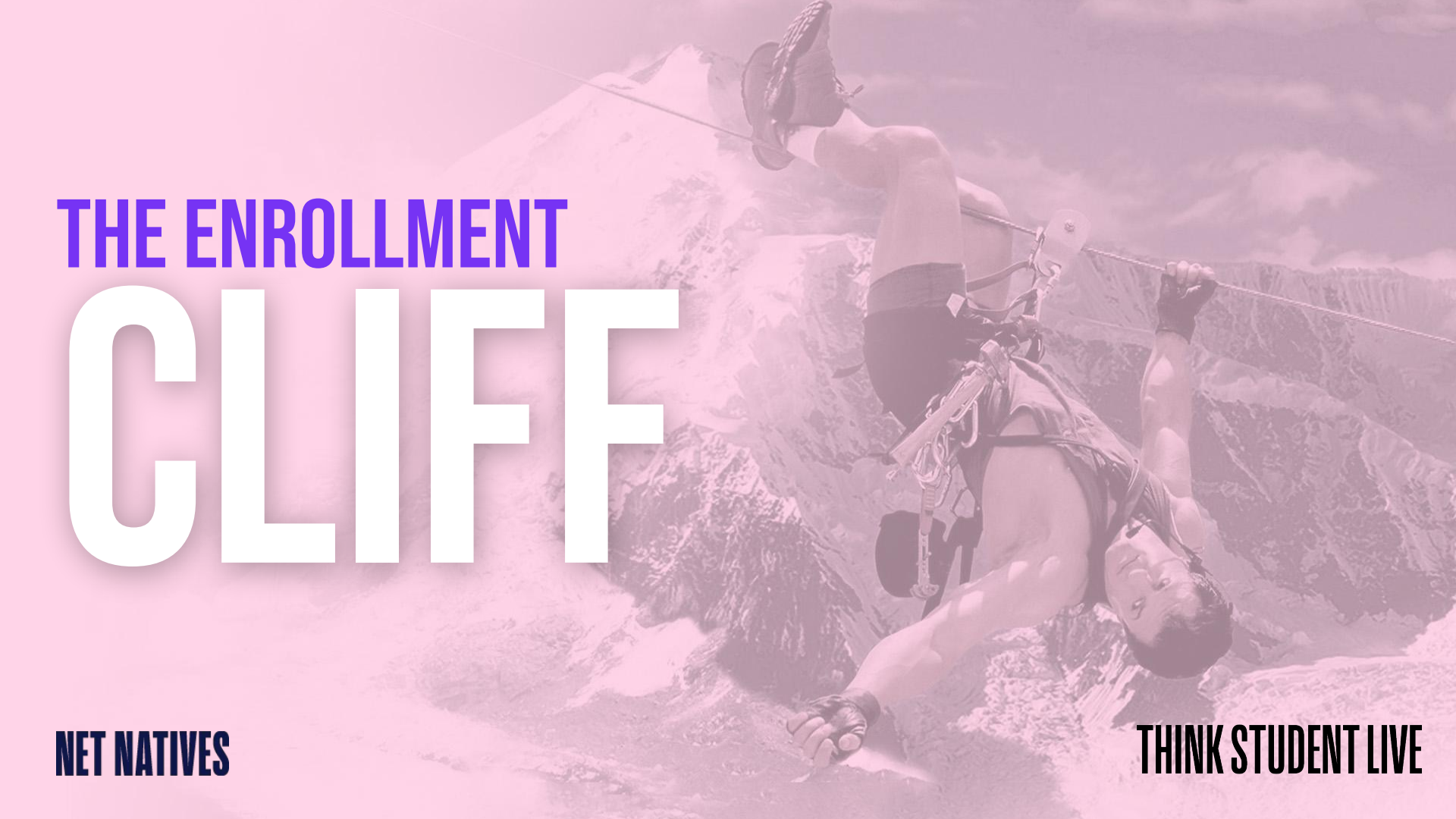
THE CHANGING STUDENT DEMOGRAPHIC

- **The Enrollment Cliff**
 - Pockets of Growth
- **What is a Non-traditional Student?**
 - Values
 - Support and Services
 - Online Learning
- **Putting it All Together**
 - Marketing Channels
 - Key Content, Messaging, and Branding
- **Moving Forward**
 - The new role of marketers



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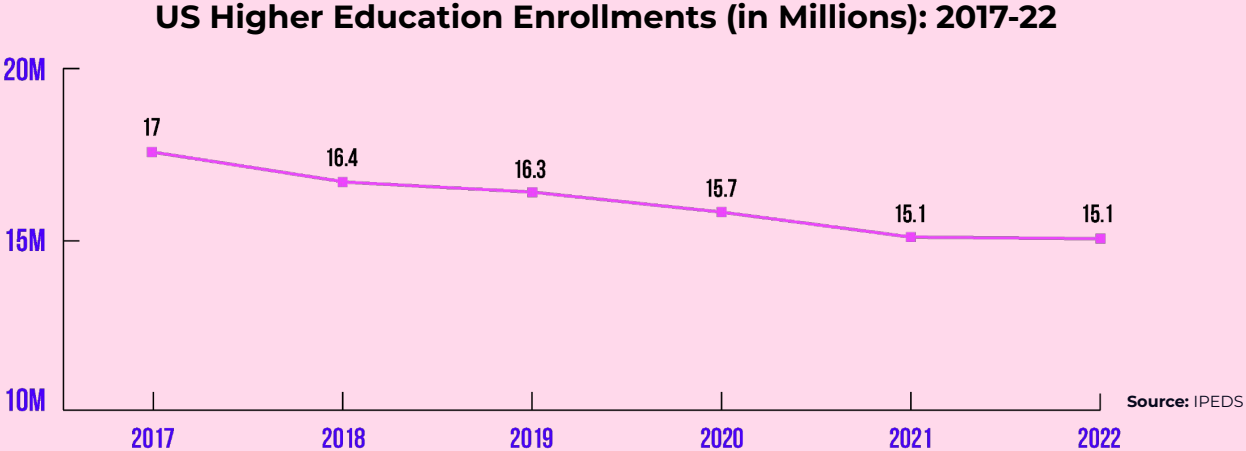


THE ENROLLMENT
CLIFF

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ENROLLMENT DECLINES HAVE BEEN THE NORM



→ In the last 5 years, higher education experienced a concerning decline, **with overall fall enrollments dropping from 17M in 2017 to 15.1M in 2022**. This trend highlights the need for institutions to adapt to attract and retain students effectively.

→ **While the decline affected all higher education institutions, 2-year institutions were hit hardest.** The decrease in enrollments in these institutions is concerning, as it may hinder social mobility and access to education for underserved communities.

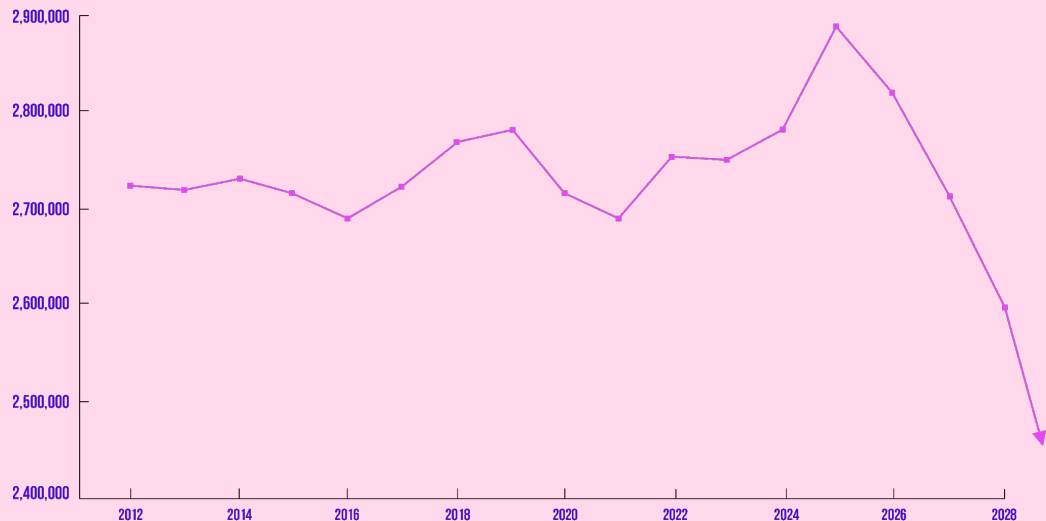
INSTITUTIONS FOCUSED ON HIGH SCHOOL STUDENTS WILL SEE SHARP DECLINES AHEAD

- Projections show a **15% decline in college-going students from 2025 to 2029.**
- Institutions heavily dependent on this demographic for enrollments need to:
 - ◆ **Diversify their enrollment pools.**
 - ◆ Plan for smaller cohorts as an alternative strategy.



The "traditional" student (a recent 18-year-old high school graduate) will be far less common due to the impending enrollment cliff.

Forecasted Number of College-Going Students in the U.S.



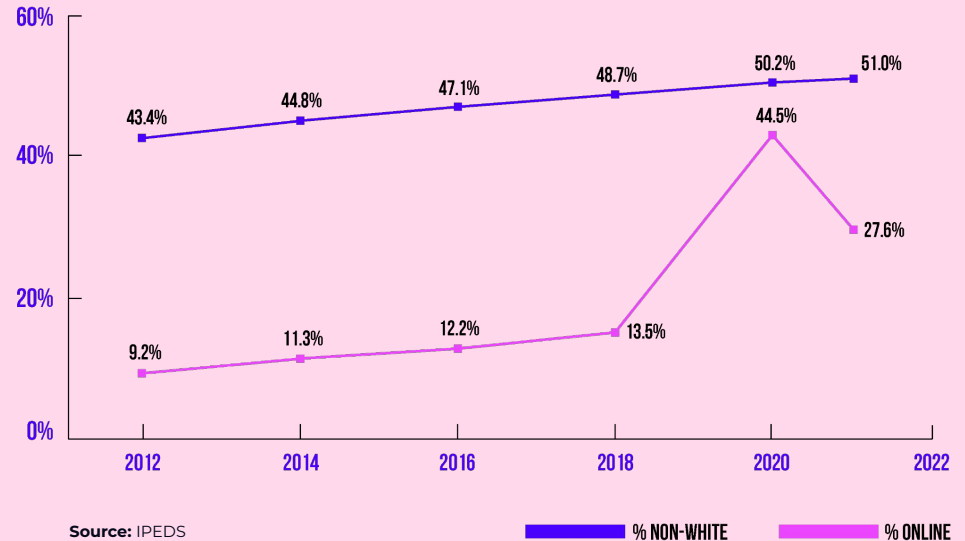
Source: Nathan Crawe's Higher Education Demand Index

HOWEVER, POCKETS OF GROWTH ARE THERE

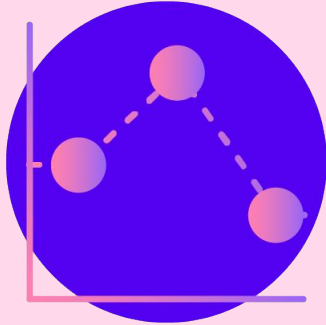
Underneath the surface, **growth has been occurring with online enrollments as well as with non-white student groups.**

- As a percentage of enrollments, these groups have steadily grown their share.
- Even with the 2020 anomaly, it is widely believed that **online enrollments will not shrink back to pre-pandemic levels**, as online education has become normalized.
- At the very least, **students will look for a blended/hybrid learning experience** throughout their degree progression.

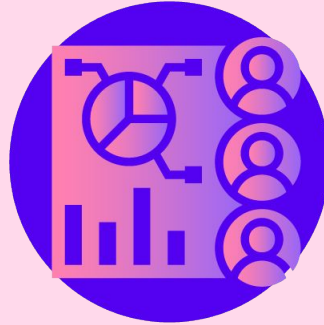
Percentage of Non-white and Online Enrollments: 2017-22



KEY TAKEAWAYS



- We are seeing widespread enrollment declines, with 2-year institutions experiencing the biggest impact.



- Institutions heavily reliant on the traditional 18-year-old demographic must diversify their enrollment pools.



- Embrace an online-first approach: Students seek blended/hybrid learning experiences for their degree progression.

WHAT IS A “NON-TRADITIONAL” STUDENT?

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MEET KATIE, THE “TRADITIONAL” NON-TRADITIONAL STUDENT



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WHAT IS A “NON-TRADITIONAL” STUDENT?

“It’s not just about age, it is **about the path the student takes** in their educational journey.”

THE “NON-TRADITIONAL LEARNER” IS THE MAJORITY OF STUDENTS

Who?

Depending on parameters, **over 80% of students could be classified as “non-traditional.”**

- Previously, a “non traditional” learner was someone who was older than age 25.
- However, as online learning and interest in alternative credentials grows, the average age of these students has actually trended younger.

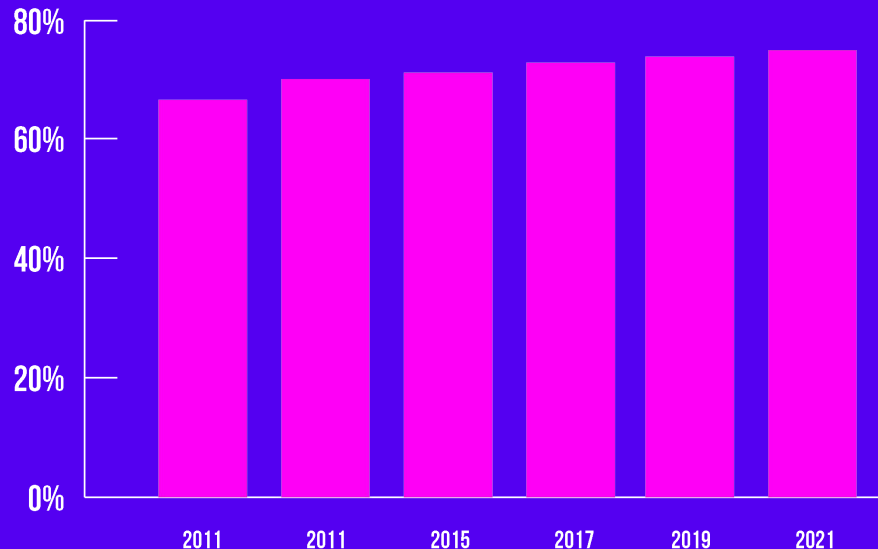
+8%

Enrollment growth, ages 18 or 19, since 2011

-14%

Enrollment decline, age 25+, since 2011

% of Undergraduate Enrollment Under Age 25: 2011-21



Source: IPEDS, U.S. Census

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WHAT DO THESE LEARNERS VALUE? THEIR TIME AND RESOURCES

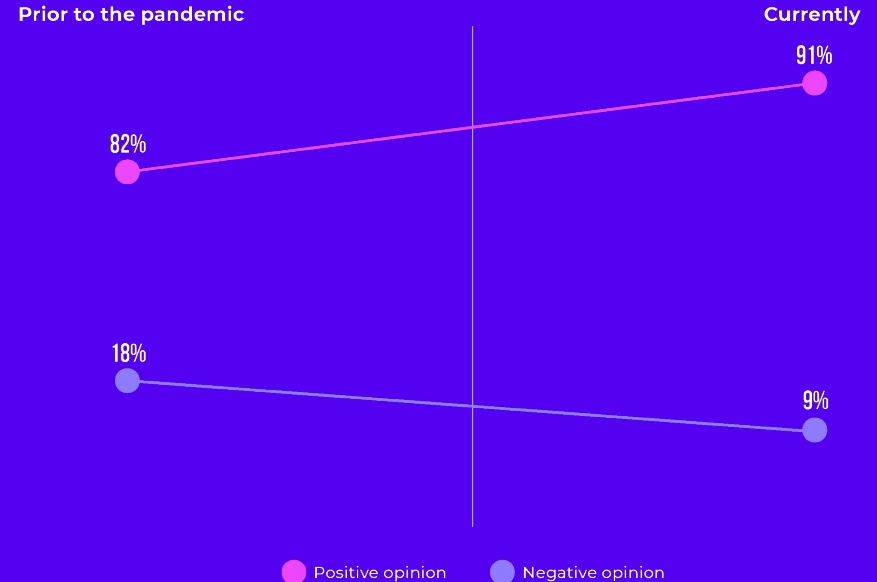
Non-traditional learners **excel in balancing education with work and family commitments.**

- Thoughtful decision-making is central to their learning journey, as they **highly value their time and resources.**
- Time and resources remain paramount at every stage, **driving their determination to achieve success.**

Their school/program **MUST:**

- Be affordable.
- Help advance their career.
- Meet their real-life schedule and priorities.
- Be online (or include online courses).
- Offer accelerated completion - short courses, bootcamps, etc.

How did/do you view online learning?

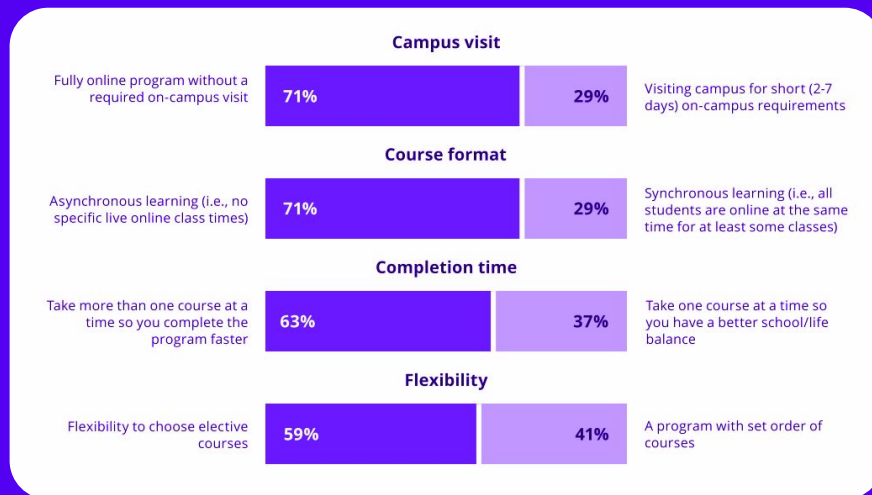


HOW ARE 100% ONLINE LEARNERS DIFFERENT?

Online learners, a subset of non-traditional learners, **share key characteristics with the larger non-traditional group including the following:**

- They are time consciousness, and **their decision is strongly influenced by affordability.**
- **Almost 40% identify as a former stopout,** indicating a desire to return to education.
- They are **highly motivated and driven by career aspirations.**
- **They are open to degree alternatives.**

When thinking about the format of a program, which options do you prefer?



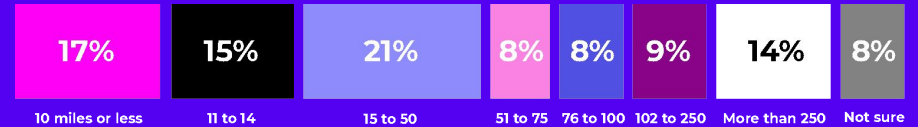
Source: Wiley University Services Voice of the Online Learner 2023

WHERE CAN YOU FIND NON-TRADITIONAL ONLINE LEARNERS?

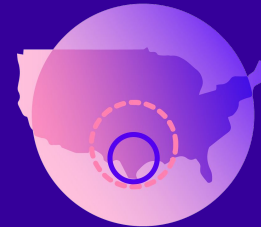
Online programs **mostly enroll local students**, despite being accessible to students nationwide.

- Approximately **53% of online learners live within a 50-mile radius** of the campus. Nearly **70% of online learners reside within 100 miles** of the campus.
- Many online students prefer not to visit the campus, **but about one-third of them consider proximity to the campus important.**
 - ◆ **Among those who value campus proximity:**
 - 45% would visit the campus to connect with a professor.
 - 43% would attend program requirements on-site.

How far do you live from the closer campus of the school you attend/plan to enroll?



Online Learners: Proximity to Campus



53% live within 50 miles

70% live within 100 miles

PUTTING IT ALL TOGETHER

Content & Messaging

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THE IMPORTANCE OF MESSAGING AND ACCESSIBILITY

To effectively market to non-traditional students, consider these three factors:



- **Tailored marketing for diverse lifestyles:** Non-traditional students often spend more time off-campus due to personal/professional commitments. Ensure your advertising is personalized and raises brand awareness.



- **Engaging content preferences:** Non-traditional students prefer long-form informational content, such as extended videos or blog posts, across various marketing channels like web, print, and social media.



- **Transparent pricing and program information:** Many non-traditional students have strict financial budgets. Promoting financial aid opportunities and clearly articulating program offerings can capture their attention.

THE IMPORTANCE OF MESSAGING AND ACCESSIBILITY

A word cloud of educational benefits. The words are arranged in a cluster, with 'affordability' being the largest and most central. Other prominent words include 'online', 'accessible', 'career growth', 'flexible', and 'student support'. The words are in white and pink colors.

accessible career growth
online speed to degree
affordability
student support flexible

CASE STUDY



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CREATIVE STRATEGY



Problem

MassBay's audience — **high school leavers and career changers** — want more from life but may lack confidence in their own potential. They need a nudge to inspire them to dream big.



Idea

How wide-open would life be, if you just dropped “can’t” from your daily dictionary. Imagine what you could do...

MassBay is just the start. Bring your hopes. Bring your ambitions. **Just cut the “can’t.”**

There's no such word.



1. Career-Focused

Messaging

You can't decide your own future. Want to gain the skills and credentials to climb the ranks in your career? Or maybe you want to earn transferable MassBay credits toward a degree? From dream jobs to prestigious four-year colleges, whatever you can imagine, we're willing to bet it's been achieved at MassBay.

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What did an education at MassBay mean for Layon?

- 📖 A supportive atmosphere
- 🏠 A place that felt like home
- 🍎 Staff that went the extra mile

 MASSBAY
COMMUNITY COLLEGE



**YOU ~~CAN'T~~
DECIDE YOUR
OWN FUTURE**

**Raise Your Career Game
at MassBay**

[Learn more](#)

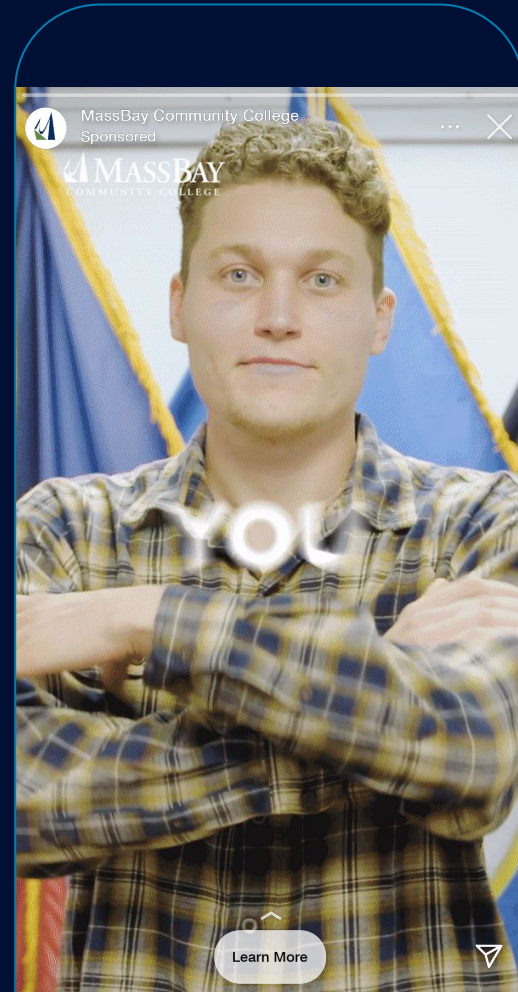
2. Flexible Programs

Messaging

You can't call the shots, with customizable study options.

Whether you want to earn transferable credits toward a four-year degree, advance your career, or just upskill with a few classes — there's a program for you at MassBay.

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3. Financial Support

Messaging

You can't overcome financial barriers. Get empowered with 1:1 financial aid counseling, and discover scholarships designed with you in mind. You can save thousands on your degree by earning transferable credits at the most affordable college in MetroWest.

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Can't? At MassBay, there's no such word. Access scholarships and 1:1 financial aid counseling at the most affordable college in MetroWest.



MASSBAY
COMMUNITY COLLEGE



**YOU ~~CAN'T~~
OVERCOME
FINANCIAL
BARRIERS**

Invest in Your Future

[Learn more](#)

CONSIDER THE USER EXPERIENCE

How can you simplify key pages of your website to make the information critical to non-traditional students accessible, while improving the user experience?

- Use Simple and Intuitive Design
- Make your Content Clear and Concise
- Utilize a List Format for Programs
- Organize your Programs Alphabetically or in a Logical Grouping
- Offer Straightforward and Visible Filters
- Limit your Visuals
- Create a Clear Path to Detailed Program Pages

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Spring 2021 Campus Health & Safety

RESOURCES FOR ALUMNI GIVE

DOMINICAN UNIVERSITY of CALIFORNIA

Academics Admissions and Aid Campus Life About Directory News Visit

Academics > Undergraduate Majors and Programs


Undergraduate Majors and Programs

Dominican University of California offers more than 60 majors, minors, and concentrations. Bachelor's degree programs are available in many disciplines, including in the arts, humanities, social sciences, education, business, and health and natural sciences and are built on the foundation of our [core curriculum](#).

Planetary Health Minor

Learn to address urgent and complex challenges at the intersection of global environmental change and human health.

[Learn More About Our Planetary Health Minor >](#)



Find Your Program

Program Type: Area of Study: School:

Accelerated (Undergraduate + Graduate)

	PROGRAM TITLE	MAJOR	MINOR	CERTIFICATE	DEGREE AWARDED	SCHOOL
A	American Studies		●		Minor	School of Liberal Arts and Education
	Arts Management		●		Minor	Barrowsky School of Business
B	Biological Sciences	●	●		BA, BS, Minor	School of Health and Natural Sciences
	Business Administration	●	●		BA, Minor	Barrowsky School of Business



ADDRESSING COST AND FINANCIAL CONCERNS

When addressing cost and financial concerns to attract non-traditional and younger online students, research emphasizes the following strategies:

- **Transparent Tuition Information:** Simplify and clearly outline total cost, fees, and financial aid options in marketing materials.
- **Scholarships and Grants:** Promote financial support specific to non-traditional and online students to enhance accessibility.
- **Work-Study Opportunities:** Offer work-study programs for students to gain experience and offset education costs.
- **Flexible Payment Plans:** Provide payment flexibility to ease financial strain for students.

**MOVING FORWARD:
THE NEW ROLE
OF MARKETERS**

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IT IS ABOUT RECRUITMENT — BUT ALSO ABOUT RETENTION

Why?

Understanding and retaining this major group of learners becomes increasingly vital amid declining enrollments and the projected 15% drop between 2025-29 (the enrollment cliff).

39 MILLION

A pool of 39 million adults with some college, no degree



Nearly half of these learners are under the age of 25.

Source: National Student Clearinghouse

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THE CHALLENGE

As marketers, what can we do to support these students throughout their entire educational journey?

It's a conversation worth continuing as the "non-traditional" student becomes the "new norm."

THINK STUDENT LIVE

THANK YOU!



Carrie Hopkins
Net Natives
**Director of Client Growth
and Media Strategy**



Matt Byerly
Net Natives
**Vice President,
Marketing**

THINK STUDENT LIVE