

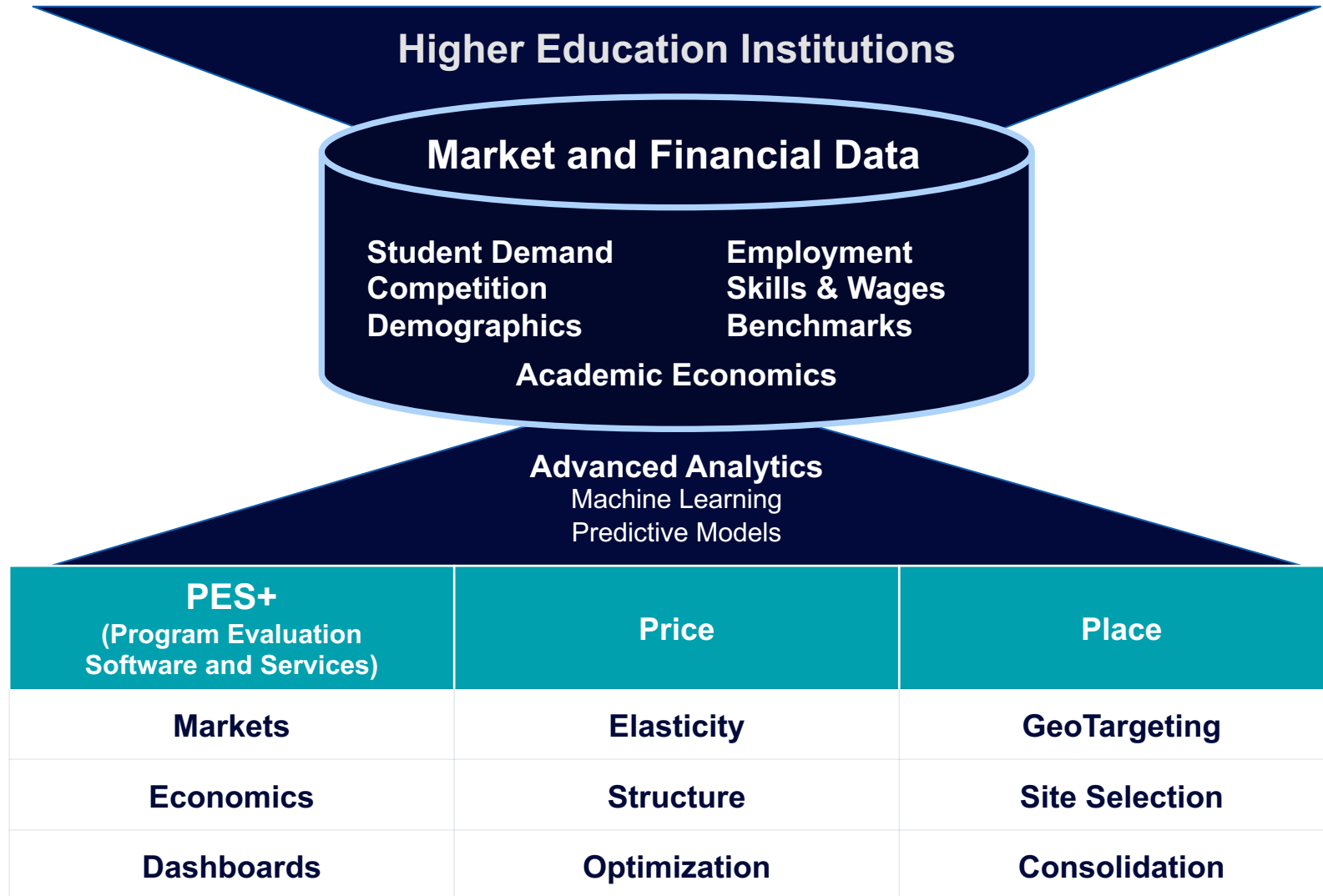


GRAY
ASSOCIATES

Demand for Higher Education Programs

Results through March 2022





Agenda

Google Search

International Student Demand

Enrollment

Employment Trends

Non-Degree Courses

Program of the Month

Summary

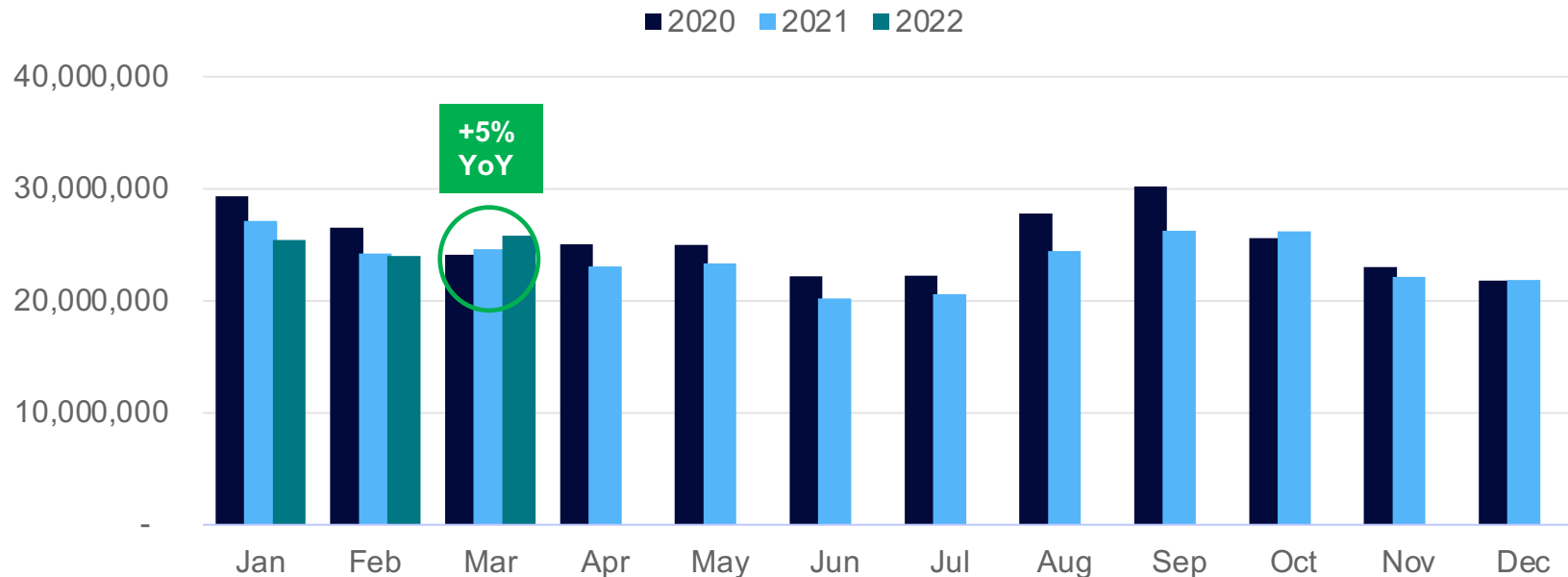
Google Search Trends: Programs

Gray now tracks a curated list of approximately 70 keywords for over 1,000 programs.

- This is an expansion from about 25 keywords for 200 programs.



U.S. Google Search Volume for Academic Programs



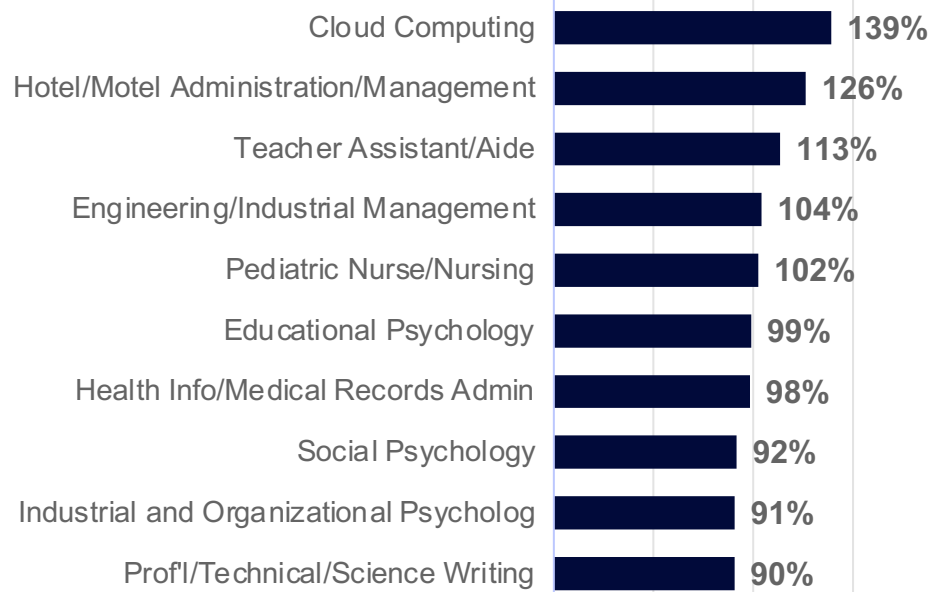
Source: Gray's Keyword Search Dashboard

Google: Fastest-Growing Programs, Nationwide

In March, searches for Cloud Computing Programs grew 139%.



March 2022 YoY Growth*



March 2022 Fastest-Growing Programs Volume*



*Google search volume for standardized list of approximately 70 academic keywords for 1,037 programs.

Source: Gray's Keyword Search Dashboard

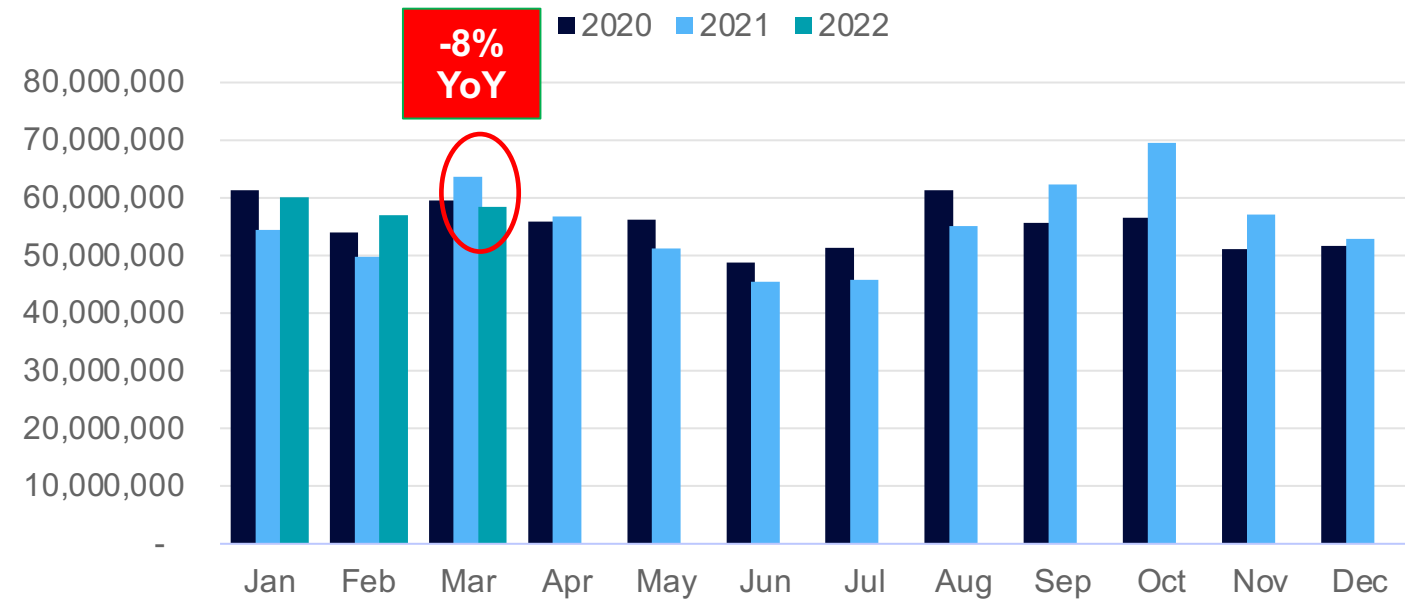
*Minimum 5,000 searches 2021

Google Brand Search

Searches for college brands fell 8% in March.



Google Search Volume for Brands



Source: Gray's Keyword Search Dashboard

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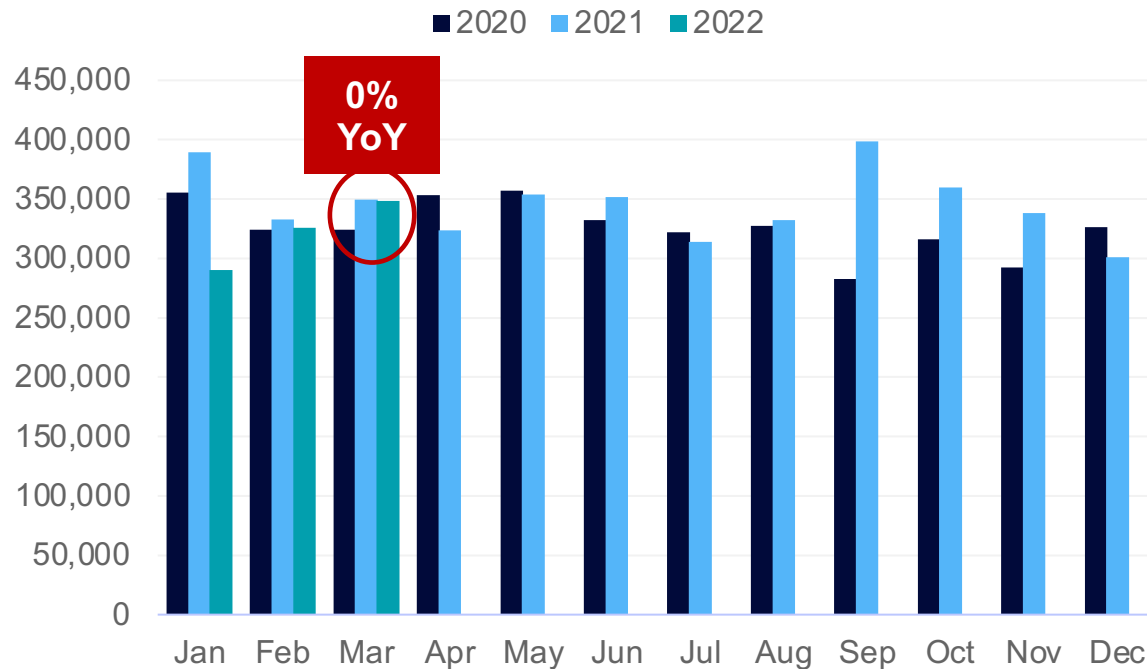
Summary

International Student Demand

International student interest in U.S. programs was unchanged YoY in March.

The most-viewed programs were Business and Data Science.

International Page Views



Top 10 Programs: March 2022

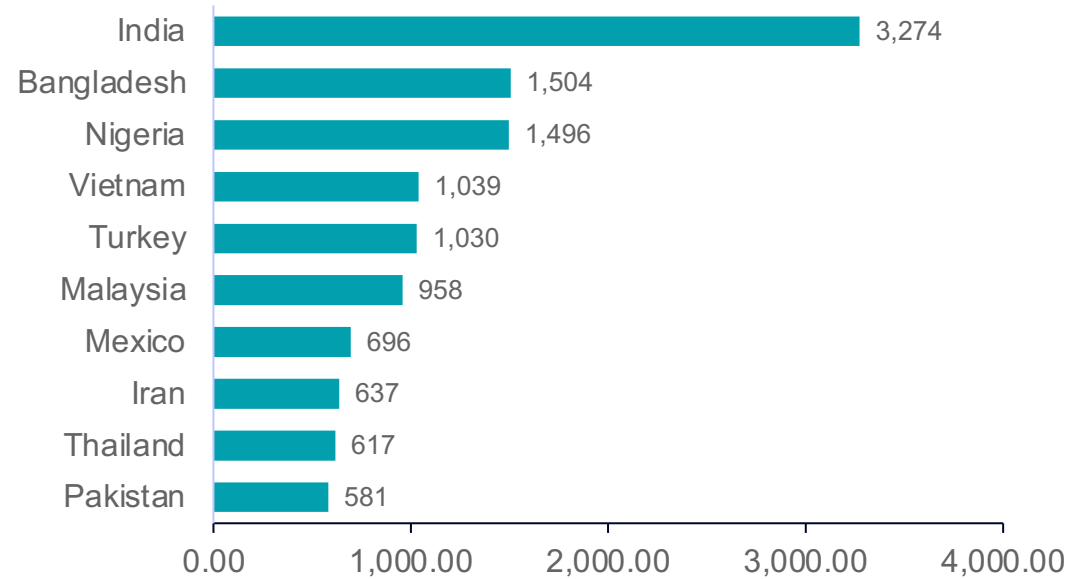


Source: Gray's International Student Demand Dashboard

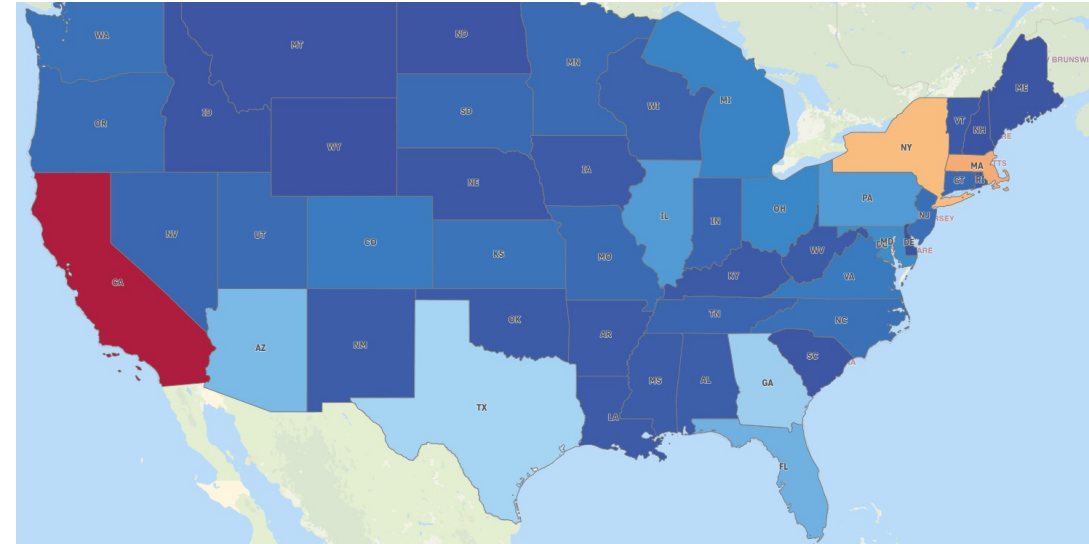
International Page Views: Business

India led in page views for Business.

International Page Views by Originating Country
Business, March 2022



California was the most popular destination – but Massachusetts was close behind!



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Non-Degree Courses

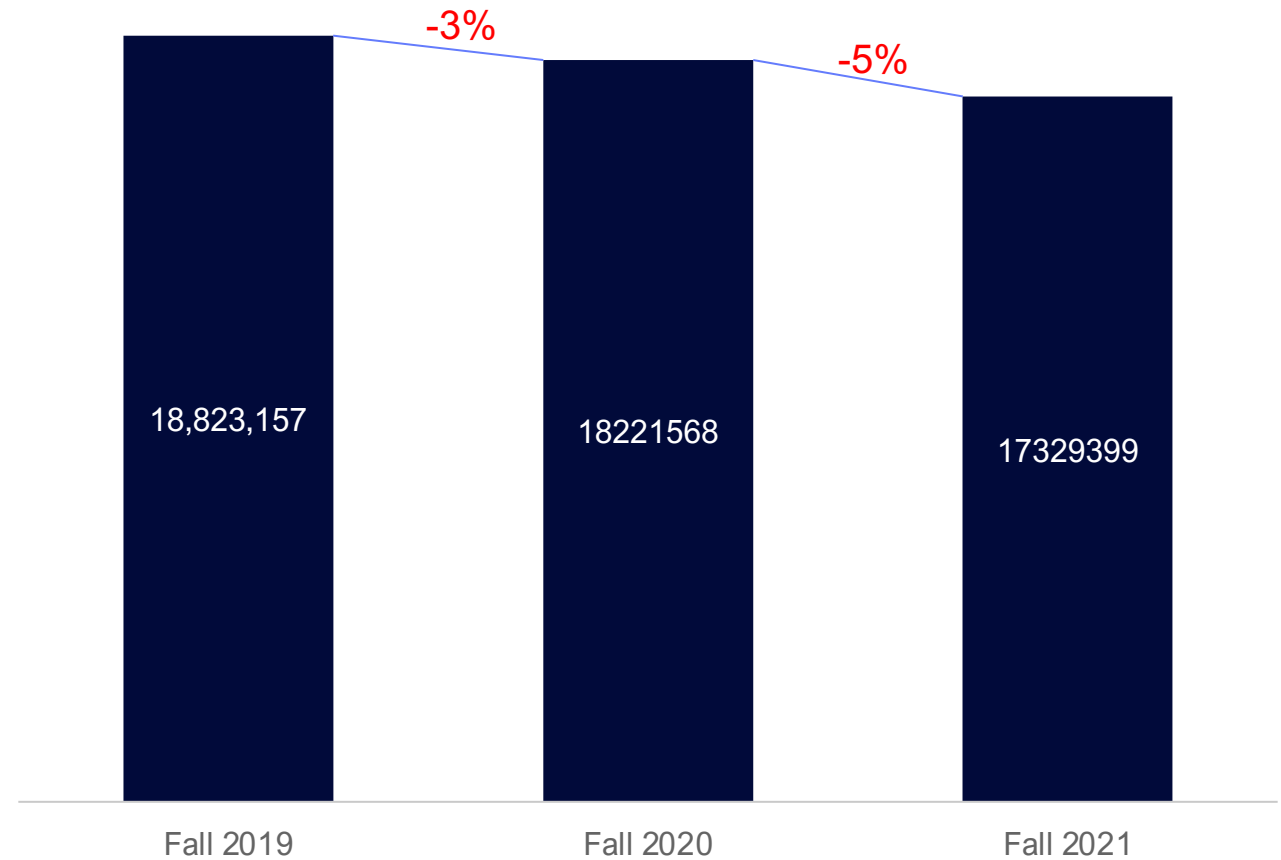
Program of the Month

Summary

Year-over-year enrollment in U.S. higher education was down by 5% in Fall 2021.

- Enrollment was down 1.5 million from 2019.

Total Fall Enrollment*
Reported to National Student Clearinghouse

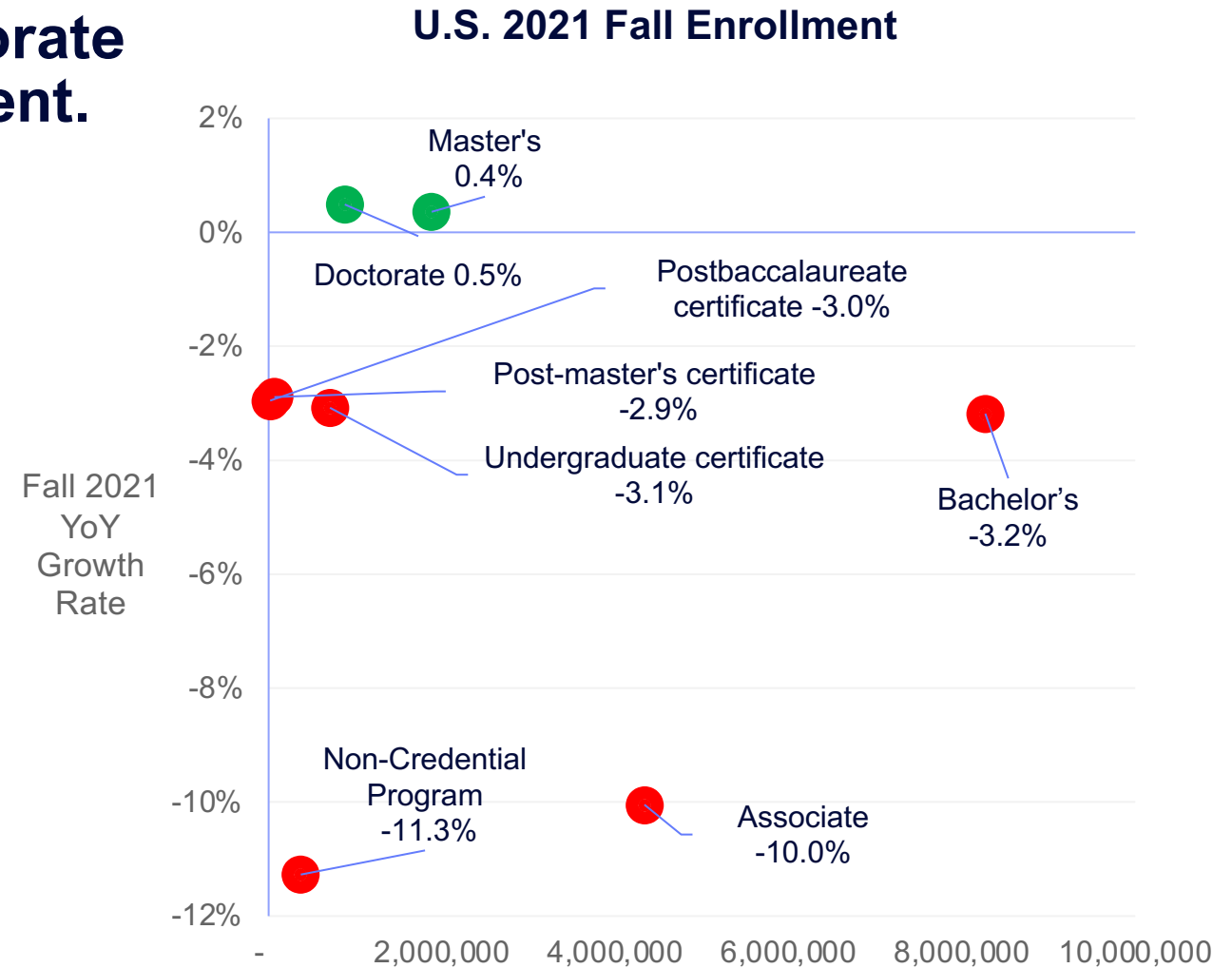


*Excludes Doctoral

Source: National Student Clearinghouse, Gray Analysis

In Fall 2021, U.S. Master's and Doctorate enrollment grew less than one percent.

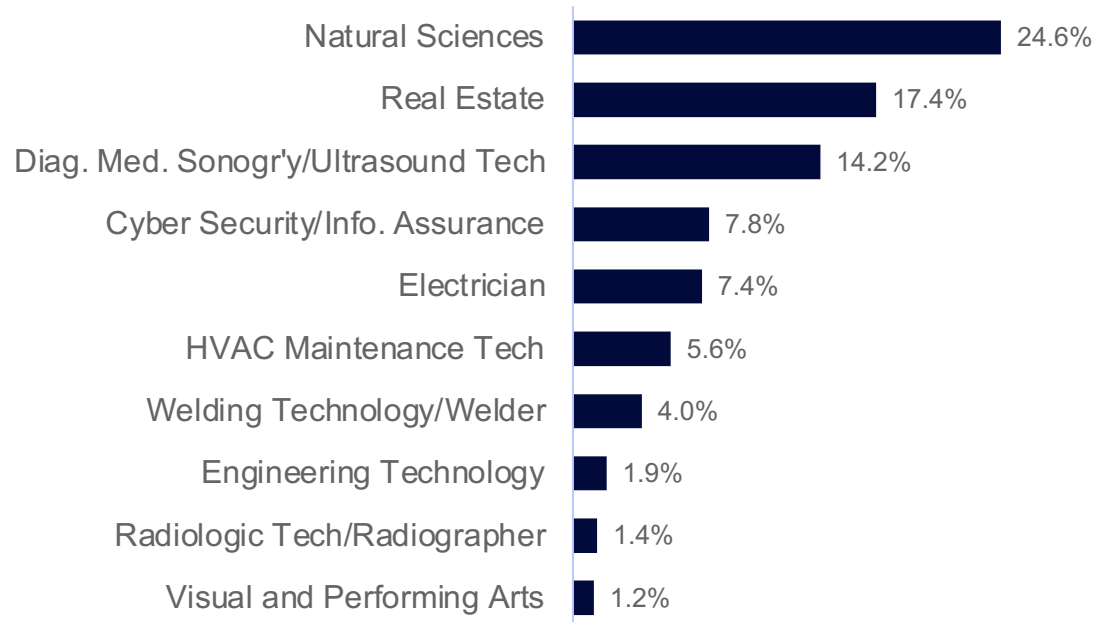
- Bachelor's enrollment fell over three percent.
- Associate enrollment fell 10%.



Source: National Student Clearinghouse, Gray Analysis

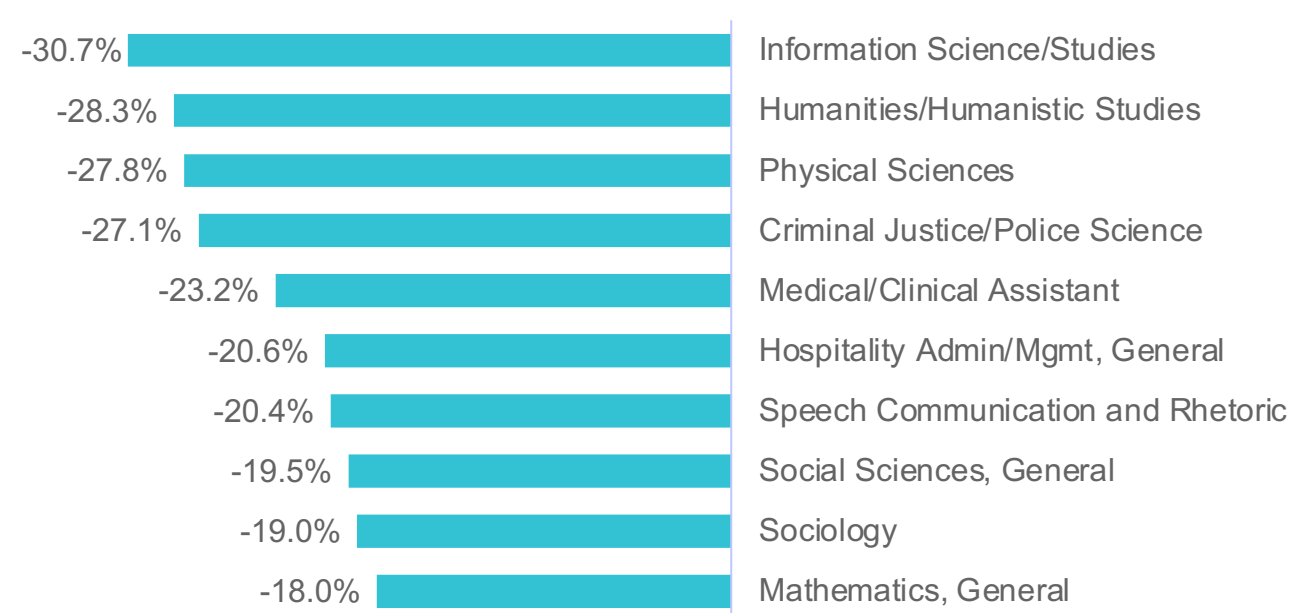
In 2020 – 2021, Natural Sciences enrollment was the fastest-growing associate program.*

2021 Enrollment: YoY Growth Rates for the 10 Fastest-Growing Associate Programs



Information Science and Humanities had the highest declines.*

2021 Enrollment: 10 Fastest-Declining Associate Programs



*Minimum program enrollment 5,000 in 2020

Source: National Student Clearinghouse, Gray Analysis

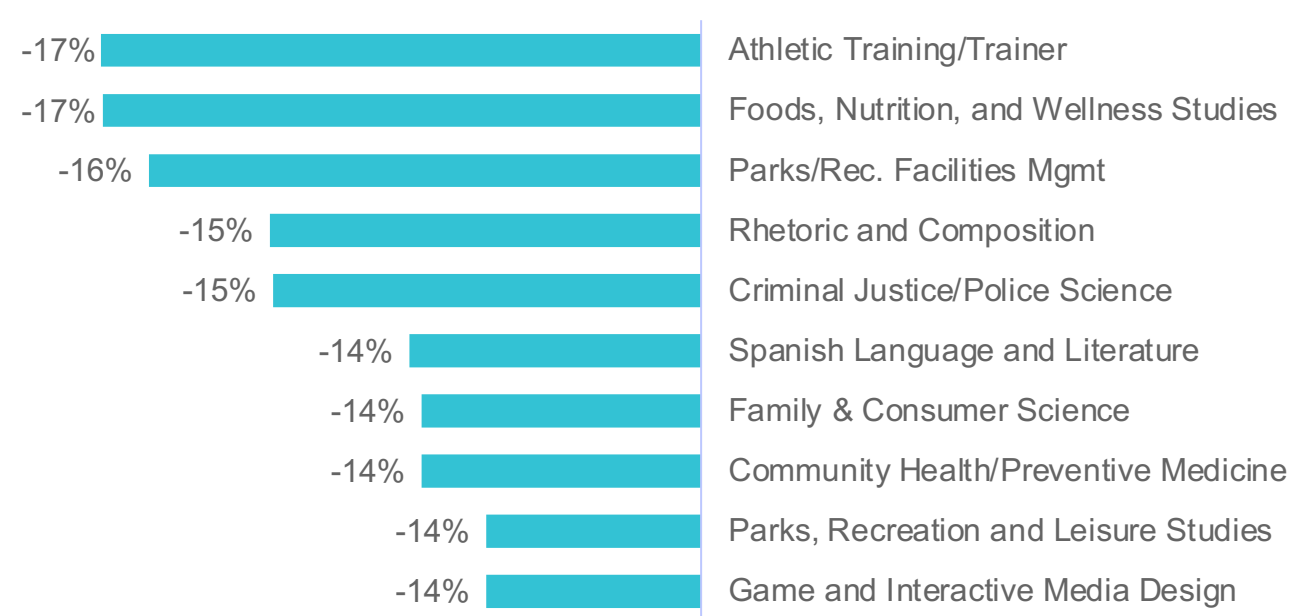
In 2020 – 2021, Behavioral Sciences was the fastest-growing bachelor’s program.

2021 Enrollment 10 Fastest-Growing Bachelor’s Programs



Three wellness programs were among the ten fastest falling bachelor’s programs 2021.

2021 Enrollment: 10 Fastest Declining Bachelor’s Programs



*Minimum program enrollment 5,000 in 2020

Source: National Student Clearinghouse, Gray Analysis

Agenda

Google Search

International Student Demand

Enrollment

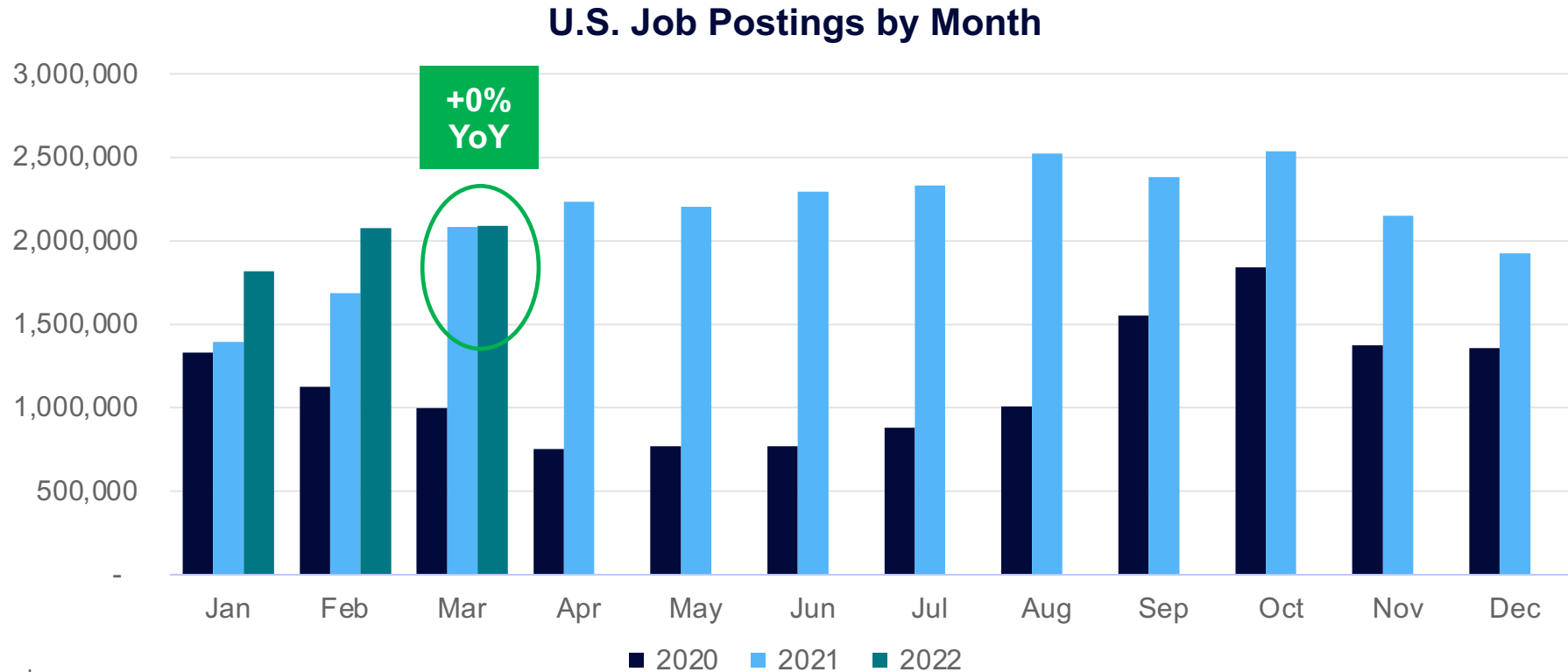
Employment Trends

Non-Degree Courses

Program of the Month

Summary

In March 2022, job postings were flat year-over-year.



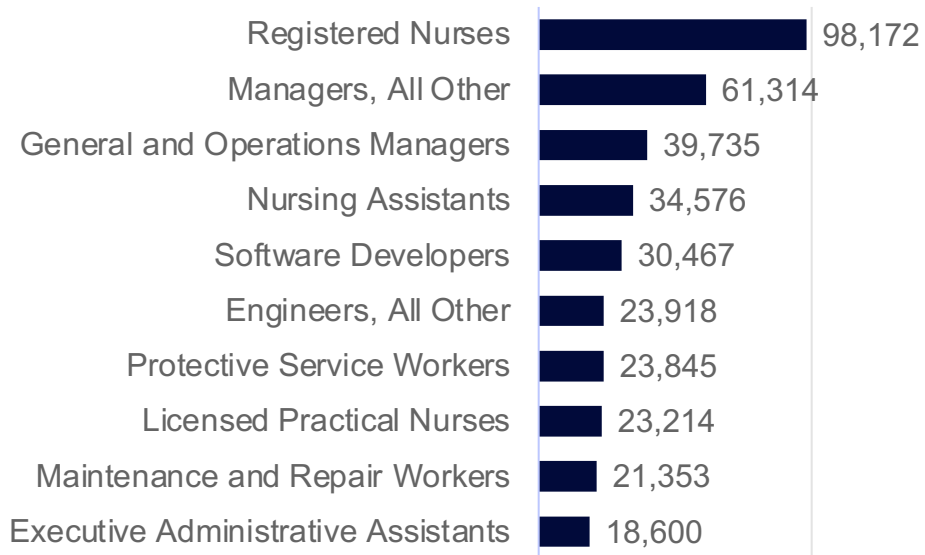
Source: Gray's Job Postings Dashboard

U.S. Job Postings Trends, March 2022

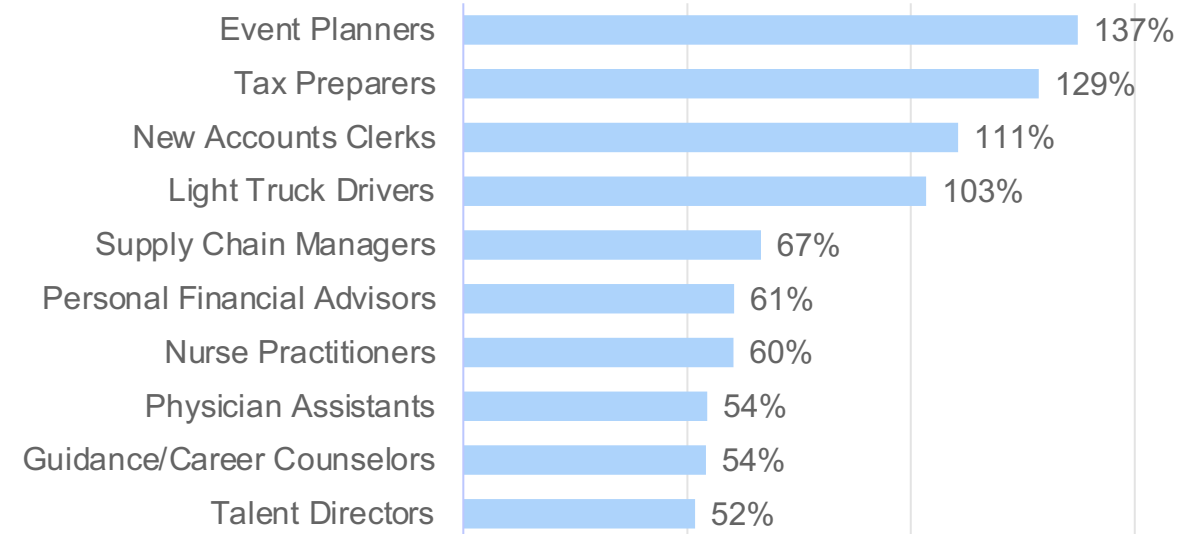
Registered Nurses had the highest volume of postings among the top ten.

Event planners increased 137%.*

March 2022 Top Job Postings
By Standard Occupational Code



March 2022 Fastest-Growing Job Postings



*Excludes postings that don't require any post-secondary education.

Source: Gray's Job Postings Dashboard

*Minimum 1000 jobs prior year.

Agenda

Google Search

International Student Demand

Enrollment

Employment Trends

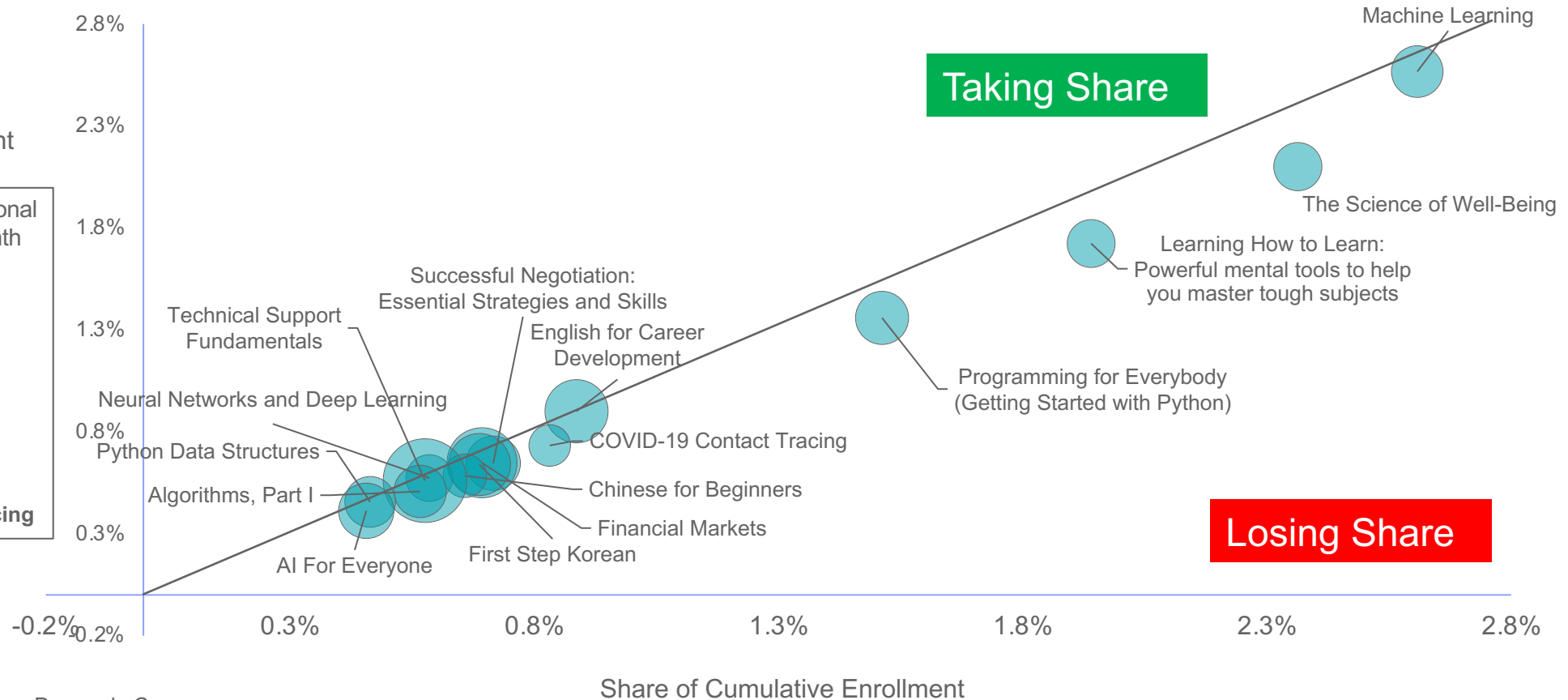
Non-Degree Courses

Program of the Month

Summary

Coursera: Largest Courses

March 2022 vs. Cumulative Enrollment



Share of March Enrollment

Bubble size is proportional to the trailing six-month percent change in enrollment.

2.43%
Technical Support Fundamentals

↕

.59%
Covid-19 Contact Tracing

Source: Gray's Non-Degree Demand: Coursera

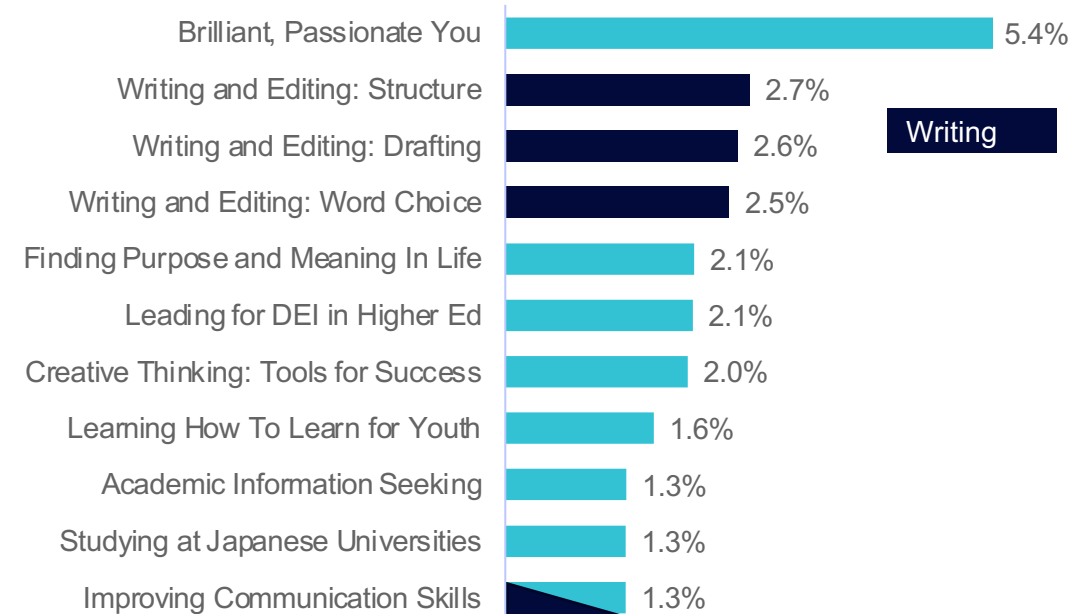
On Coursera, Personal Development was the largest category after Data Analysis and Software Engineering.

Personal Development Enrollment Volume
Fastest-Growing Courses Trailing Six Months



Within Personal Development, enrollment in personal fulfillment and writing courses grew the most.

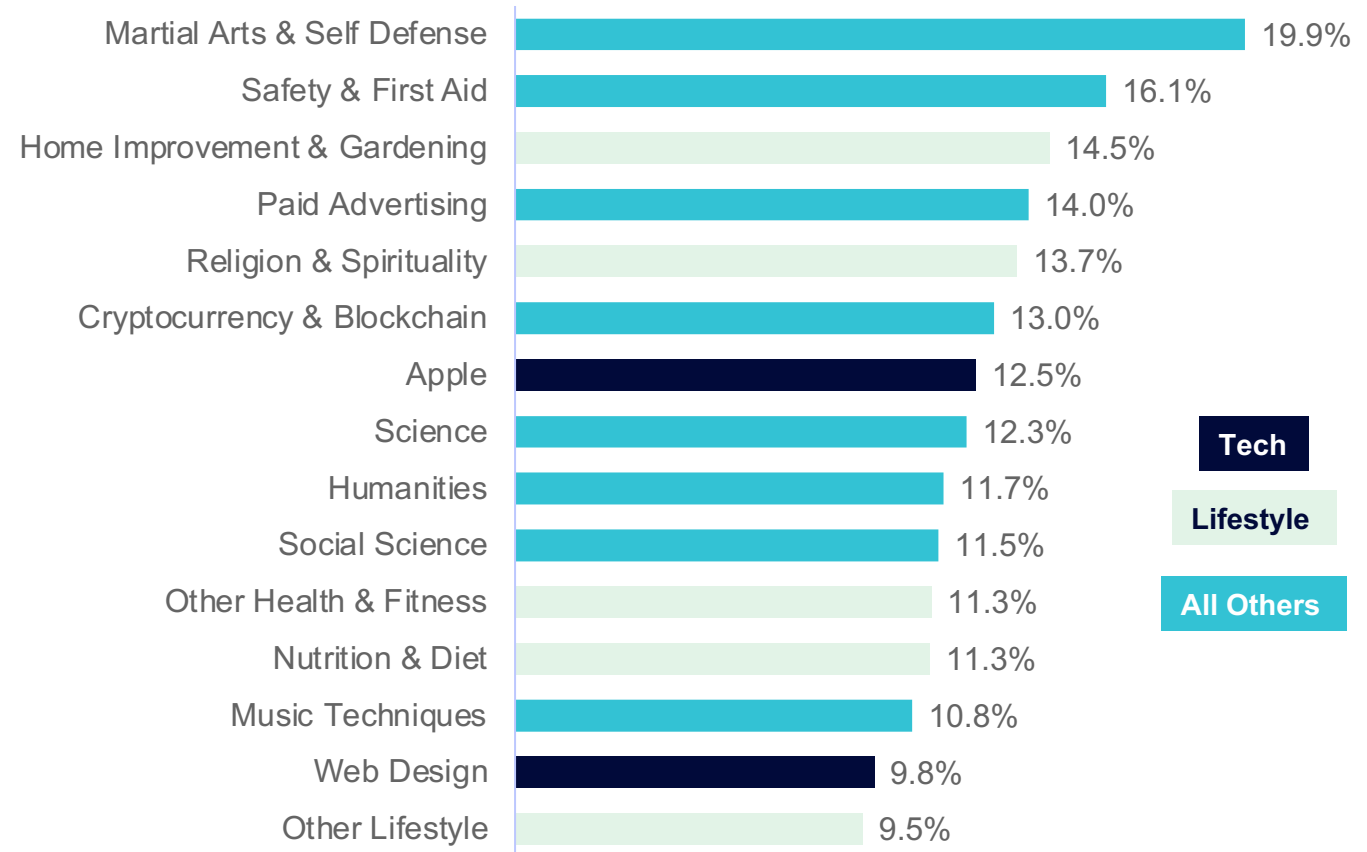
Fastest-Growing Course Enrollment*
Personal Development, Trailing Six Months



Udemy: Fastest-Growing Categories

Two of Udemy's Top fastest-growing categories are in tech.

Fastest-Growing Categories on Udemy Trailing Six Months



Agenda

Google Search

International Student Demand

Enrollment

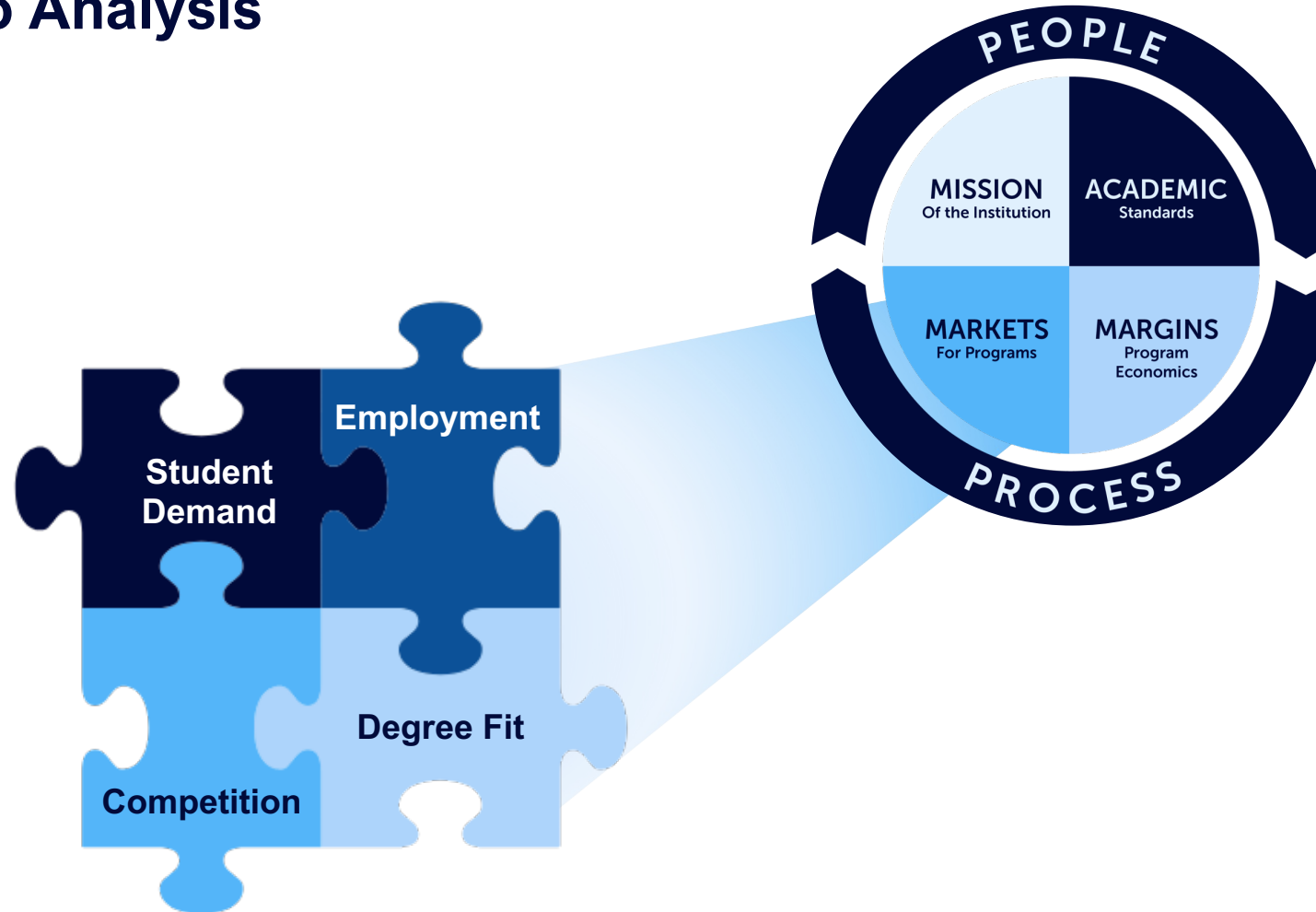
Employment Trends

Non-Degree Courses

Program of the Month

Summary

Program Portfolio Analysis



Program Markets: Program Rank

We score on Student Demand, Employment, Competitive Intensity, and Degree Fit.

- Let's focus on the Bachelor's of English Language and Lit., General

California Program Ranking Bachelor's Award Level

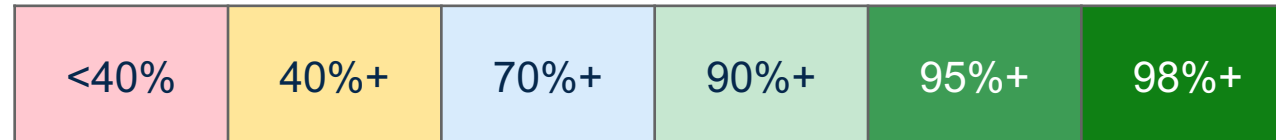
(Double-click Field headers to change sorting.)

CIP	Total Percentile	Student Demand Percentile	Competitive Intensity Percentile	Employment Percentile	Degree Fit Percentile
14.4201 Mechatronics/Robotics/Automation Eng'g	96	50	50	99	50
43.0100 Crim. Justice & Corrections, Gen'l	95	99	0	73	50
23.0101 English Language and Lit., Gen'l	95	99	0	17	50
03.0104 Environmental Science	95	98	6	66	50
44.0501 Public Policy Analysis, General	95	95	16	78	50
11.0401 Information Science/Studies	95	94	6	94	50
51.0201 Communication Science, Gen'l	95	93	28	83	50
42.2707 Social Psychology	95	92	99	20	50
27.0301 Applied Mathematics, General	95	92	25	91	50
30.3101 Human Computer Interaction	95	88	97	89	50
26.0999 Physiology/Pathology/Related Sciences, Other	95	86	99	50	50
14.4501 Biological/Biosystems Engineering	95	85	97	93	50
14.0803 Structural Engineering	95	80	95	96	50
45.0699 Economics, Other	95	50	99	91	50
52.0807 Investments and Securities	95	50	50	99	50
52.0899 Finance and Financial Mgmt Services, Other	95	50	50	99	50
38.0101 Philosophy	94	97	25	20	50
09.0100 Communication, General	94	97	13	31	50

Program Scorecard: Percentiles

All data are color-coded by their percentile rank in the local market compared to over 1,400 IPEDS programs (CIP codes).

Percentile Color-Code:



Program Scorecard: Student Demand

English scores in the 99th percentile for Student Demand in CA.

- Completions are strong for this program.
 - Almost all completions are on campus.
 - Completion volume grew 4% year-over-year.
- Google search volume is decent and grew 23% year-over-year.
- International students are interested in English programs in California.

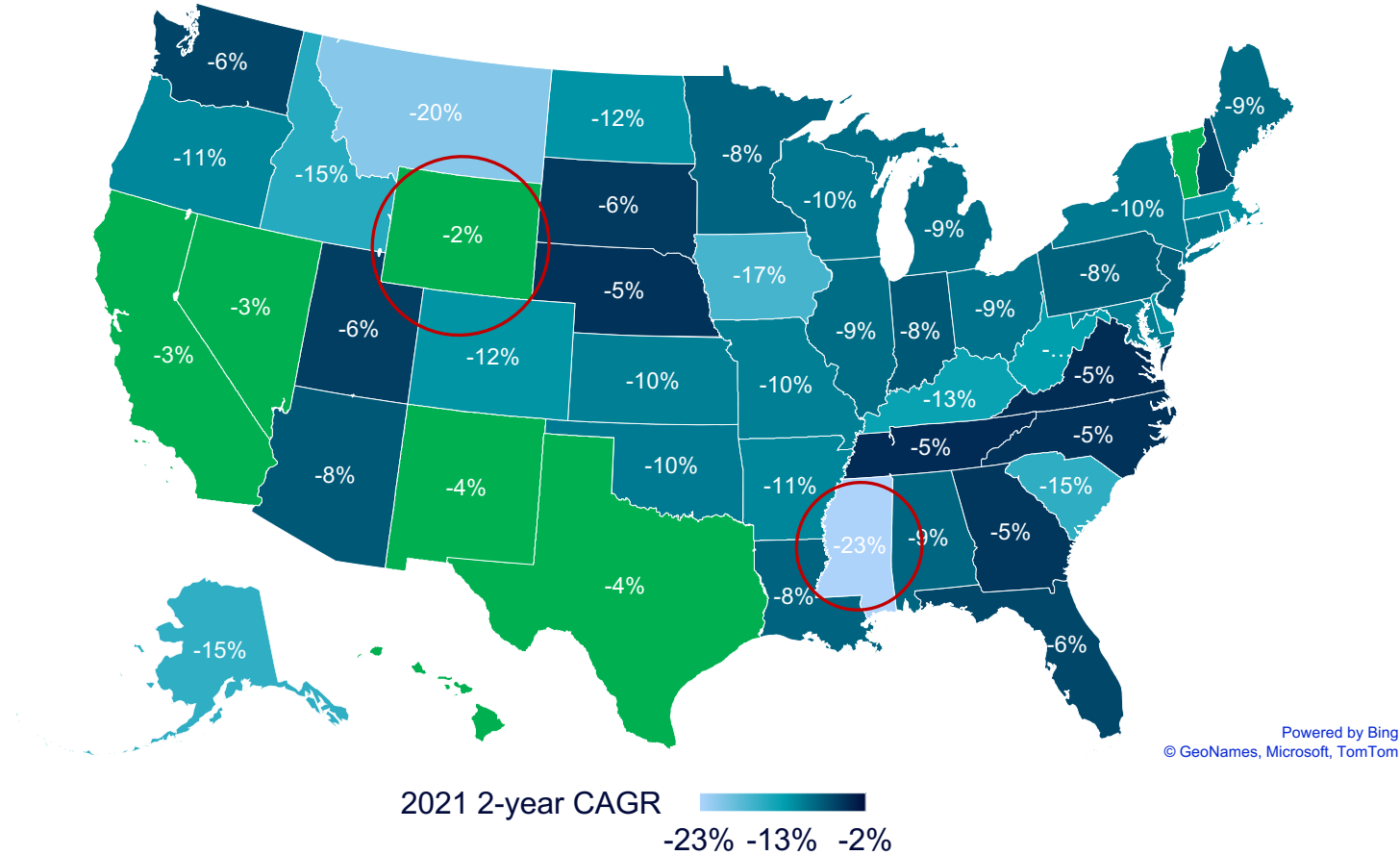
Student Demand Score: 33 Percentile: 99

Catego...	Pctl	Criterion	Value	Score
Size	99	Inquiry Volume (12 Months)	1,691	4
	95	Int'l Page Views (12 Months)	781	NS
	51	Google Search Volume (3 Months)*	9,310	4
	99	On-ground Completions at In-Market Institutions	4,022	12
	98	Online Completions by In-Market Students	94	4
	99	Sum of On-ground and Online Completions	4,116	3
Growth	98	Inquiry Volume YoY Change (Units)	709	1
	74	Google Search YoY Change (Units)*	1,715	1
	98	Completion Volume YoY Change (Units)	146	3
	73	Inquiry Volume YoY Change (%)	72%	NS
	83	Google Search YoY Change (%)*	23%	1
	56	Completion Volume YoY Change (%)	4%	0

From 2019 to 2021, enrollment in all U.S. English programs dropped.

- Enrollment decline was the lowest in Wyoming.
- The decline was the highest in Mississippi.
- The average total enrollment in California from 2019 – 2021 was 26,124.
- The U.S. average was 79,280.

2019 – 2021 English Program Enrollment Change
Two-year annual growth



Program Scorecard: Employment

English ranks in the 17th percentile for Employment in CA.

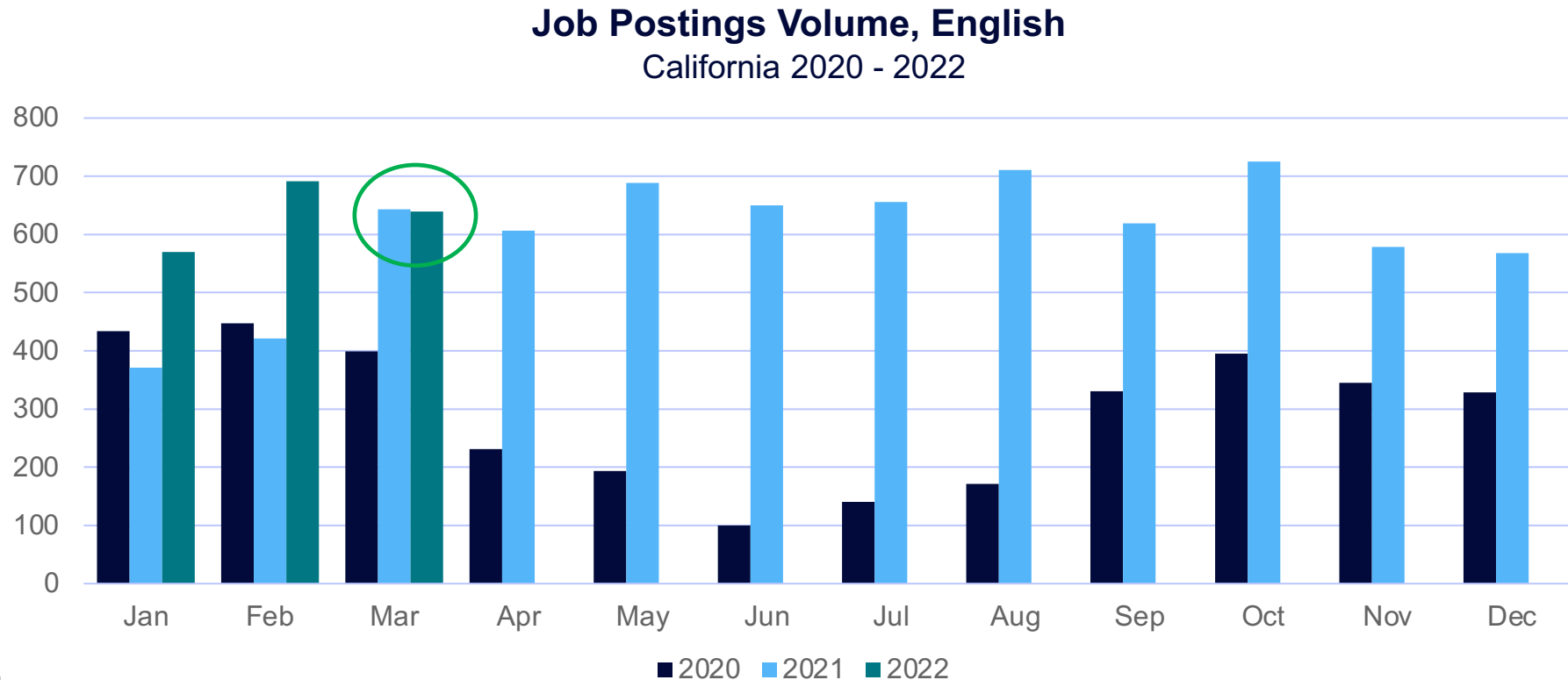
- Job postings for English graduates are high.
 - Seven percent of English graduates are in jobs for which they were directly prepared.
- For direct prep jobs, the market is saturated.
- For the 30 – 60 age group, wages are at the 49th percentile – which is about average. Unemployment rates are low.

Employment*

Score: -4 Percentile: 17

Category	Pctl	Criterion	Value	Score
Size: Direct Prep	87	Job Postings Total (12 Months)*	2,705	1
	84	BLS Current Employment*	12,430	1
	84	BLS Annual Job Openings*	1,087	0
Size: Bachelors with ACS	98	Job Postings Total (12 Months)*	18,095	NS
	99	BLS Current Employment*	127,494	NS
Growth (Direct Prep)	51	BLS 1-Year Historical Growth*	-3.0%	0
	27	BLS 3-Year Historic Growth (CAGR)*	-2.5%	-1
	9	BLS 10-Year Future Growth (CAGR)*	-0.2%	NS
Saturation (Direct Prep)	28	Job Postings per Graduate*	0.4	-1
	26	BLS Job Openings per Graduate*	0.2	-1
Wages (Direct Prep)	39	BLS 10th-Percentile Wages*	\$41,582	NS
	46	BLS Mean Wages*	\$73,591	NS
American Community Survey Bachelor's Degree Outcomes	26	Wages (Age < 30)	\$39,540	0
	49	Wages (Age 30-60)	\$86,926	0
	66	% with Any Graduate Degree	47%	NS
	72	% with Masters	32%	NS
	76	% with Doct/Prof Degree	16%	NS
	86	% Unemp. (Age <30)**	4%	-2
	73	% Unemp. (Age 30-60)**	2%	-1
	55	% in Direct Prep Jobs	7%	NS

California job postings for English graduates dropped 1% year-over-year.

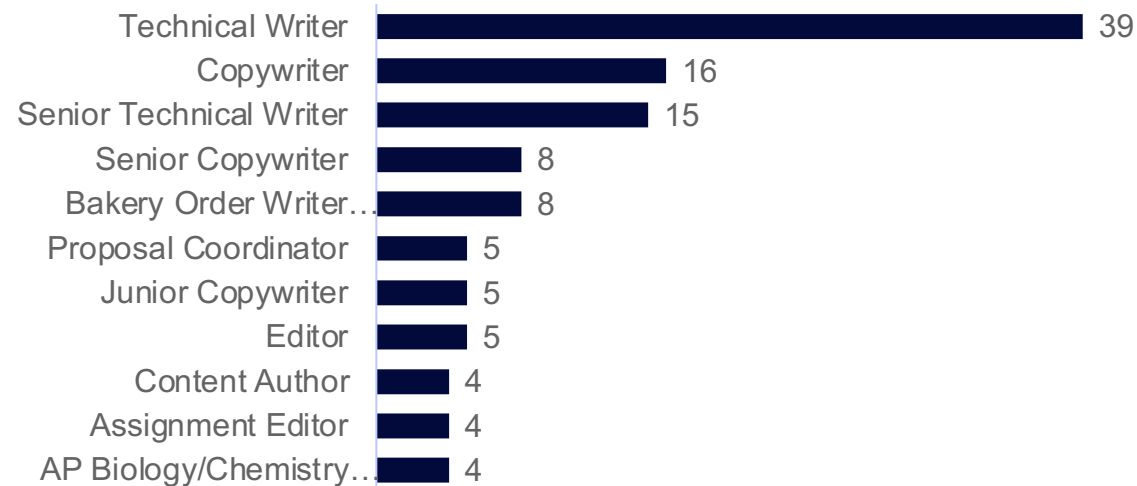


Job Postings: English

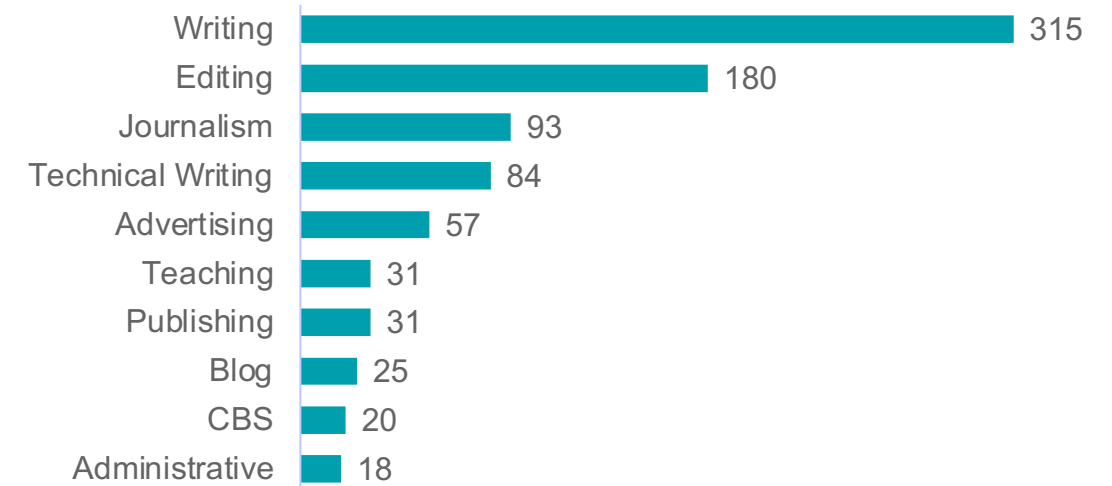
In March, Technical Writers were in demand in California.

- Writing and editing skills were listed in job postings with the highest frequency.

Top Job Postings, English
March 2022

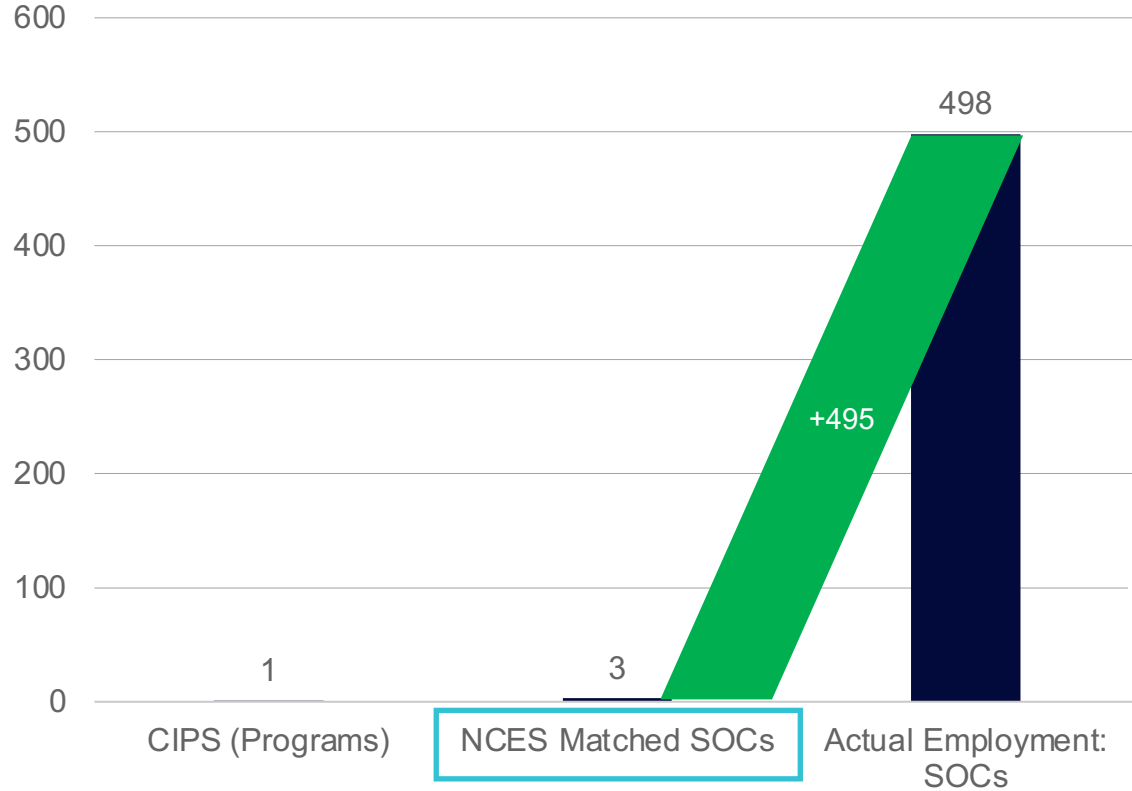


Top Skills, English
March 2022

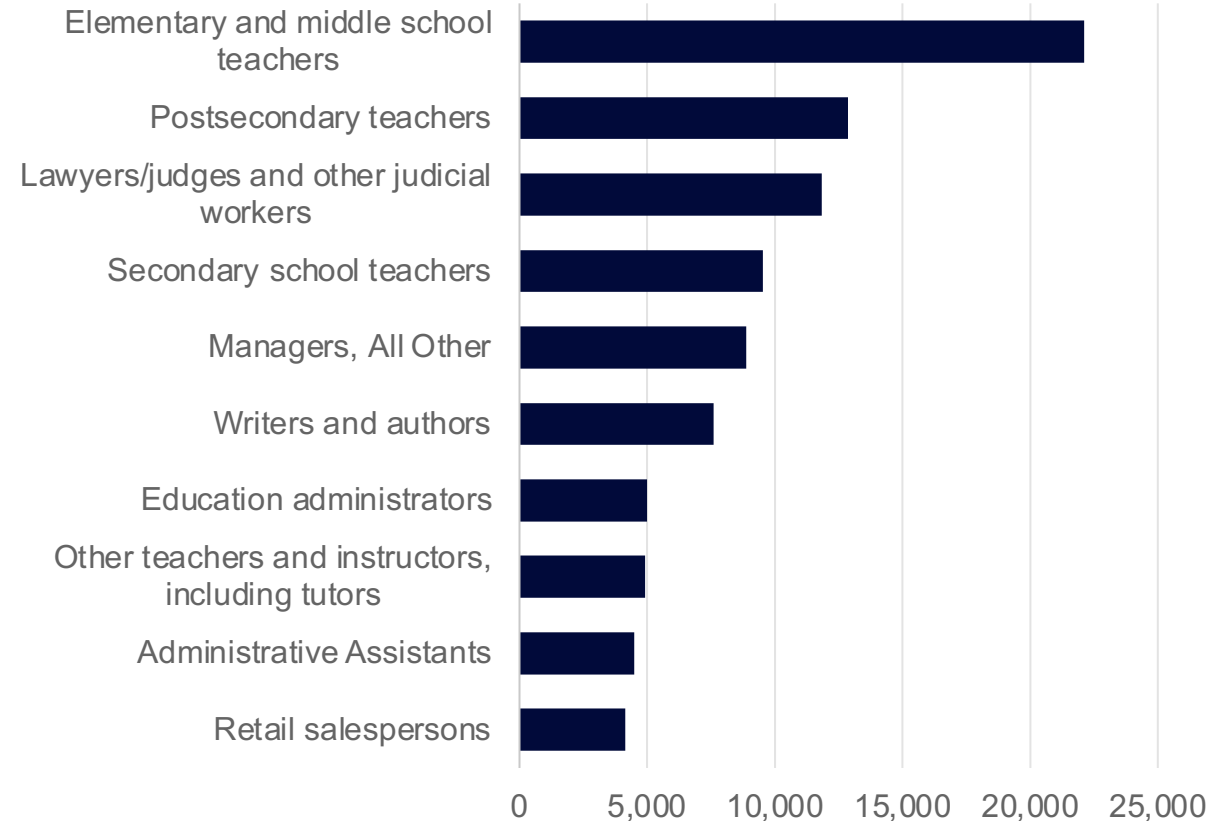


In CA, English majors go into 498 SOCS and earn \$86,926 (49th).

Count of Programs and Occupations
CIP 23.0101, English



Top Occupations, English Majors, Ages 30-60



Source: U.S. Census, American Community Survey, 2015 - 2019

Program Scorecard: Competitive Intensity

English is in the bottom percentile for Competitive Intensity in CA.

- Students complete this program at 86 institutions.
 - Six competitors have entered the market.
- 12 online institutions graduated California students.
- Marketing costs are high.
- 62 online institutions offer the program nationally.

Competitive Intensity Score: -9 Percentile: 0

Category	Pctl	Criterion	Value	Score
Volume of In-Market Competition	99	Campuses with Graduates**	86	-4
	99	Campuses with Grads YoY Change (Units)**	6	-3
	98	Institutions with Online In-Market Students**	12	NS
In-Market Program Sizes	82	Average Program Completions	50	0
	67	Median Program Completions	21	0
	68	YoY Median Prog. Compl. Change (Units)	1	0
	59	YoY Median Prog. Compl. Change (%)	4%	0
In-Market Saturation	39	Average Cost per Inquiry**	\$50	0
	80	Google Search * Cost per Click**	\$20	-2
	32	Google Competition Index**	0.24	0
National Online Competition	98	National Online Institutions (Units)**	62	NS
	70	Nat'l Online % of Institutions	5%	NS
	66	Nat'l Online % of Completions	3%	NS

Program Scorecard: Degree Fit

A Bachelor's degree is an appropriate degree level for this program.

- 59% of completions are at the Bachelor's level in CA.
- 44% of the national workforce hold a bachelor's degree.

National Completions by Level

Score: 0

Award Level	Completions (National)	Completions (Market)	Inquiries (Market)
Certificate	1%	1%	0%
Associates	7%	32%	0%
Bachelors	79%	59%	75%
Postbaccalaureate Certificate	0%	0%	0%
Masters	9%	7%	24%
Post-masters Certificate	0%	0%	0%
Doctoral	3%	1%	0%
Unknown	0%	0%	0%

Degree Fit:

Score: 0 Percentile: 50

National Workforce Ed. Attainment

Score: 0

Award Level	BLS Educational Attainment
No College	5%
Some College	8%
Associates	5%
Bachelors	44%
Masters	24%
Doctoral	13%

Program Scorecard: English ranks in the 91st percentile in California.

CIP: 23.0101 English Language and Lit., Gen'l

Market: California

Total Score: 9
Percentile: 91
Student Demand

Score: 27 Percentile: 99

Catego...	Pctl	Criterion	Value	Score
Size	99	Inquiry Volume (12 Months)	1,691	2
	95	Int'l Page Views (12 Months)	781	NS
	51	Google Search Volume (3 Months)*	9,310	4
	99	On-ground Completions at In-Market Institutions	4,022	8
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	73	Inquiry Volume YoY Change (%)	72%	NS
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Competitive Intensity

Score: -13 Percentile: 0

Category	Pctl	Criterion	Value	Score
Volume of In-Market Competition	99	Campuses with Graduates**	86	-8
	99	Campuses with Grads YoY Change (Units)**	6	-3
	98	Institutions with Online In-Market Students**	12	NS
In-Market Program Sizes	82	Average Program Completions	50	0
	67	Median Program Completions	21	0
	68	YoY Median Prog. Compl. Change (Units)	1	0
	59	YoY Median Prog. Compl. Change (%)	4%	0
In-Market Saturation	39	Average Cost per Inquiry**	\$50	NS
	80	Google Search * Cost per Click**	\$20	-2
	32	Google Competition Index**	0.24	0
National Online Competition	98	National Online Institutions (Units)**	62	NS
	70	Nat'l Online % of Institutions	5%	NS
	66	Nat'l Online % of Completions	3%	NS

Employment*

Score: -5 Percentile: 15

Category	Pctl	Criterion	Value	Score
Size: Direct Prep	87	Job Postings Total (12 Months)*	2,705	1
	84	BLS Current Employment*	12,430	0
	84	BLS Annual Job Openings*	1,087	NS
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Size: Bachelors with ACS	99	BLS Current Employment*	127,494	NS
	51	BLS 1-Year Historical Growth*	-3.0%	NS
	27	BLS 3-Year Historic Growth (CAGR)*	-2.5%	-1
Growth (Direct Prep)	9	BLS 10-Year Future Growth (CAGR)*	-0.2%	-1
	28	Job Postings per Graduate*	0.4	-1
	26	BLS Job Openings per Graduate*	0.2	NS
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	72	% with Masters	32%	NS
	76	% with Doct/Prof Degree	16%	NS
	86	% Unemp. (Age < 30)**	4%	-2
	73	% Unemp. (Age 30-60)**	2%	-1
	55	% in Direct Prep Jobs	7%	NS

CIP Description:

A general program that focuses on the English language, including its history, structure and related communications skills; and the literature and culture of English-speaking peoples.

Degree Fit:

Score: 0 Percentile: 50

Category	Pctl	Criterion	Value	Score
NHEBI	13	Cost Index**	67%	NS
Natl 2 Year	81	Student: Faculty Index	120%	NS

National Completions by Level

Score: 0

Award Level	Completions (National)	Completions (Market)	Inquiries (Market)
Certificate	1%	1%	0%
Associates	7%	32%	0%
Bachelors	79%	59%	75%
Postbaccalaureate Certificate	0%	0%	0%
Masters	9%	7%	24%
Post-masters Certificate	0%	0%	0%
Doctoral	3%	1%	0%
Unknown	0%	0%	0%

National Workforce Ed. Attainment

Score: 0

Award Level	BLS Educational Attainment
No College	5%
Some College	8%
Associates	5%
Bachelors	44%
Masters	24%
Doctoral	13%

* - Google search, employment data and Jobs Per Grad Ratio do not filter by award level.
 ** - Color scale in reverse.
 NA - No data available/not currently tracked.
 NS - Not Scored in Rubrics (values = 0).
 2-Yr - Associates & certificate programs only.
 PCTL - Percentile

Total Percentile	0	20+	40+	70+	90+	95+	98+	100
Total Score	-48	-21	-20	-1	8	13	20	45

** Color Scale in Reverse

Percentile (Reverse)	<02	02+	05+	10+	30+	60+
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Agenda

Google Search

International Student Demand

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Program of the Month

Summary

- U.S. Google searches increased 5% year-over-year in March.
 - Searches for college brands dropped 8%.
- Fall 2021 enrollment declined 5% year-over-year.
 - Enrollment declined at every award level except for Master's and Doctorate.
- The highest volume of U.S. job postings was for registered nurses and managers.
 - Postings for event planners increased 137% year-over-year.
- Market demand for English programs at the Bachelor's level is high in CA.
 - Enrollment has declined 3% since 2019.
- Graduates of English programs have many employment options and low unemployment rates.
 - Opportunities are low for direct prep jobs.

Upcoming Webinars

Topic	Date
Master Class IV: The Future of Academic Program Evaluation and Management	<i>Thursday</i> May 5 th at 2:00 pm ET
Demand Trends Webcast	<i>Thursday</i> May 26 th at 2:00 pm ET

Contact:
 Robert Atkins
RobertGrayAtkins.com

