



GRAY[™]
DECISION INTELLIGENCE

Demand for Higher Education Programs



December 18th, 2025

Agenda

What is a Program Evaluation System?

Student Demand Indicators

Employment: Current Indicators

The 12 Days of Program Ideas

Summary

Program Evaluation System Overview



Agenda

What is a Program Evaluation System?

Student Demand Indicators: Google Keywords

Employment: Current Indicators

The 12 Days of Program Ideas

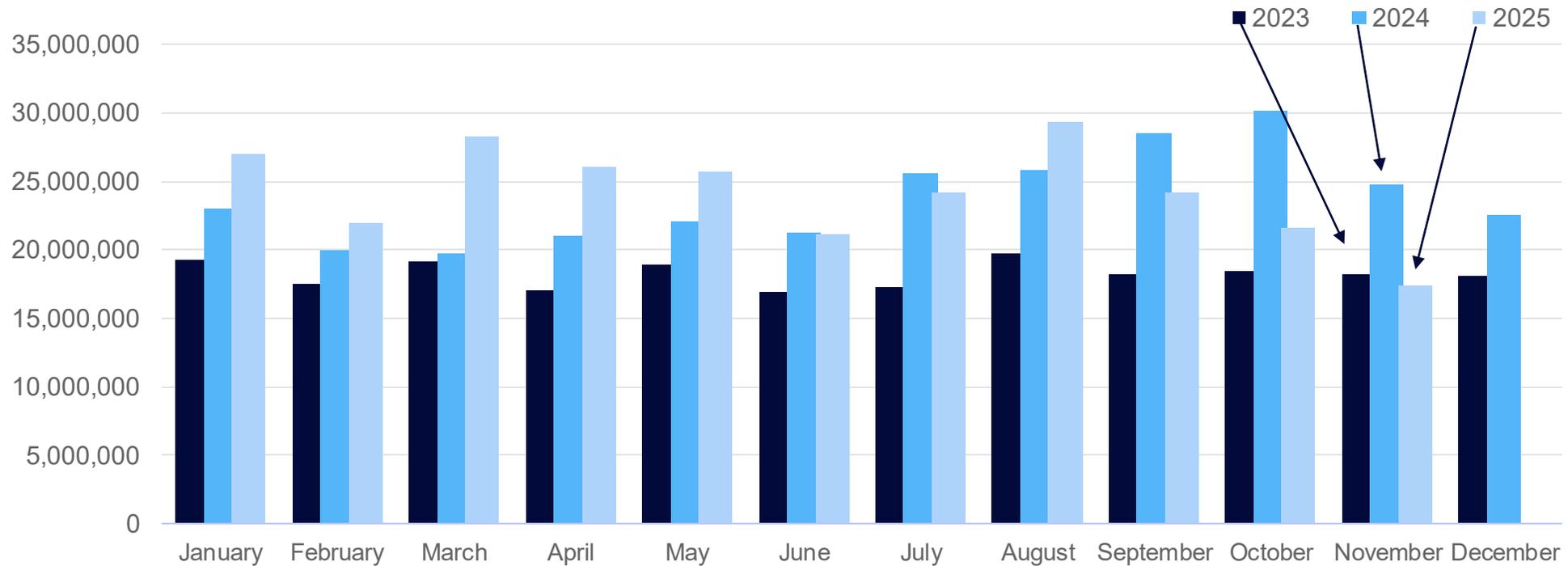
Summary

Google Search Trends: Programs

Gray DI tracks searches for over 900 programs (90% of all US completions).



US Google Search Volume



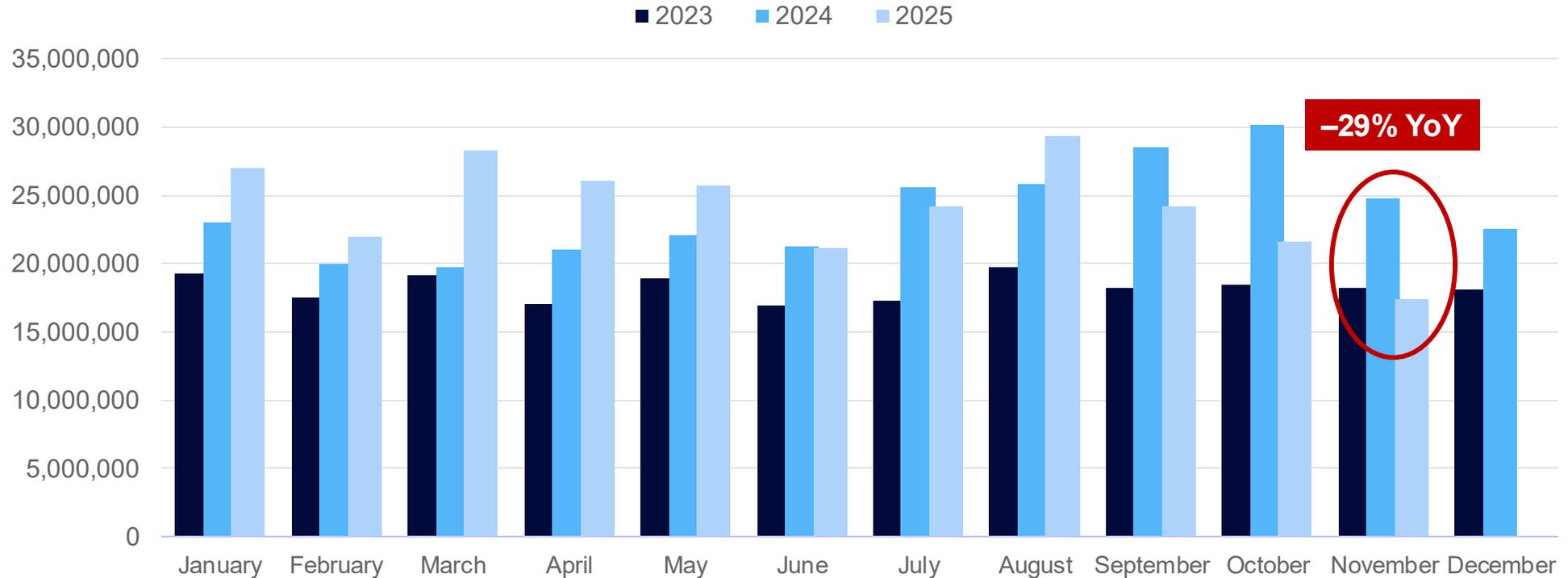
Source: Gray DI's PES Keyword Search Dashboard

Google Search Trends: Programs

In November, Google searches for academic programs fell 29% year-over-year.



US Google Search Volume

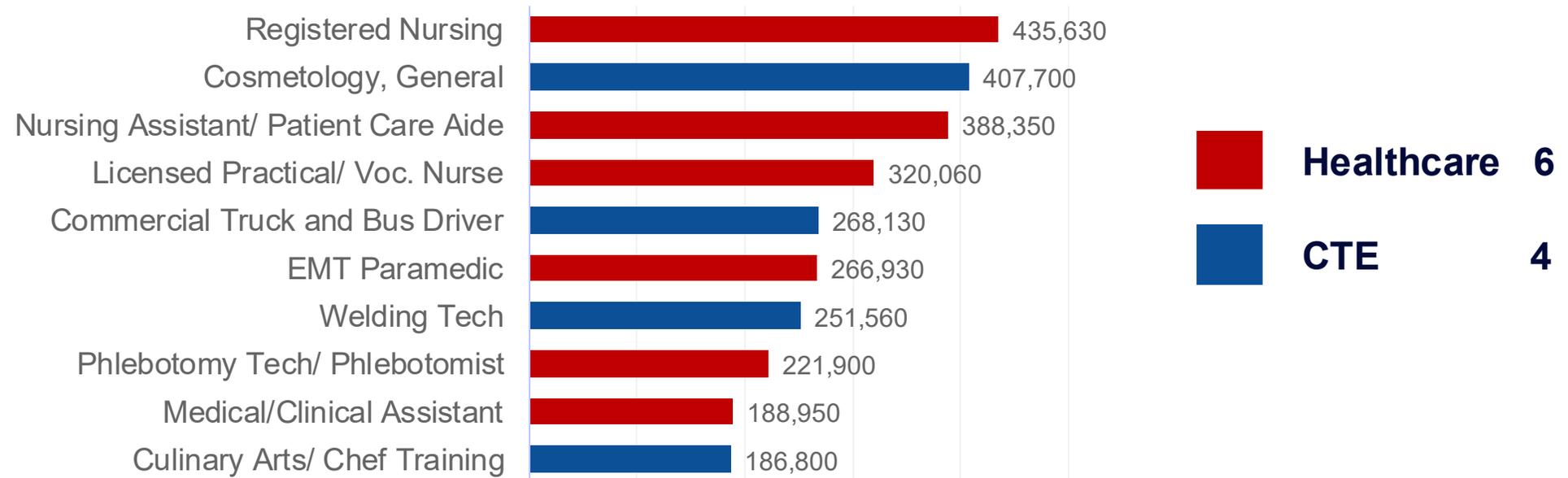


Source: PES Keyword Search Dashboard

Google: Highest Program Search Volume (Community College Specific)

In November, there were over 435,600 searches for Registered Nursing programs.

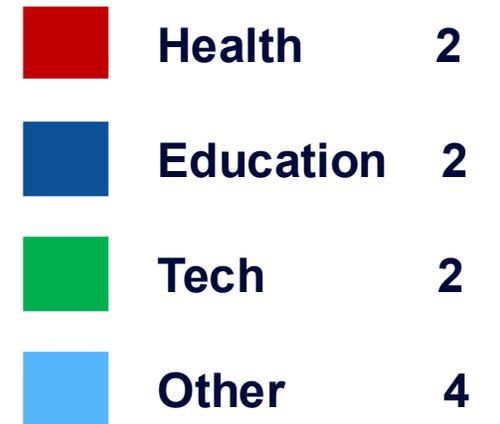
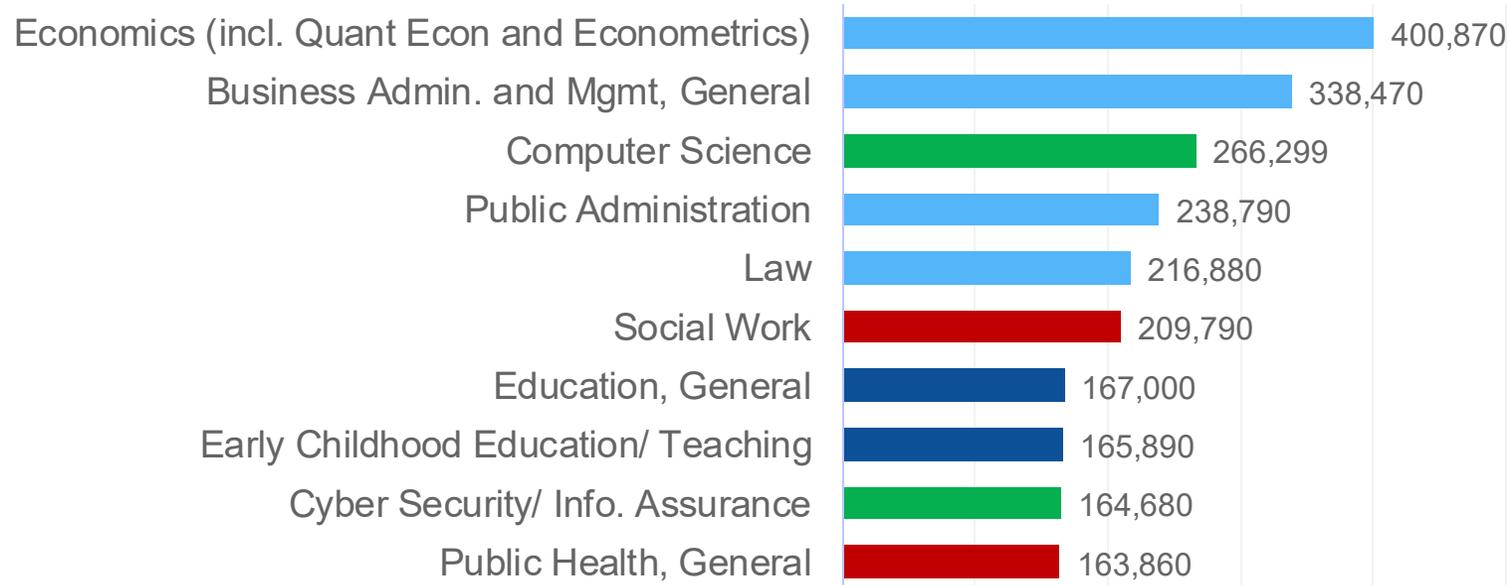
Programs with the Highest Google Search Volumes
November 2025



Google: Highest Search Volume (Transfer and 4-year)

In November, there were **400,870** searches for Economics programs.

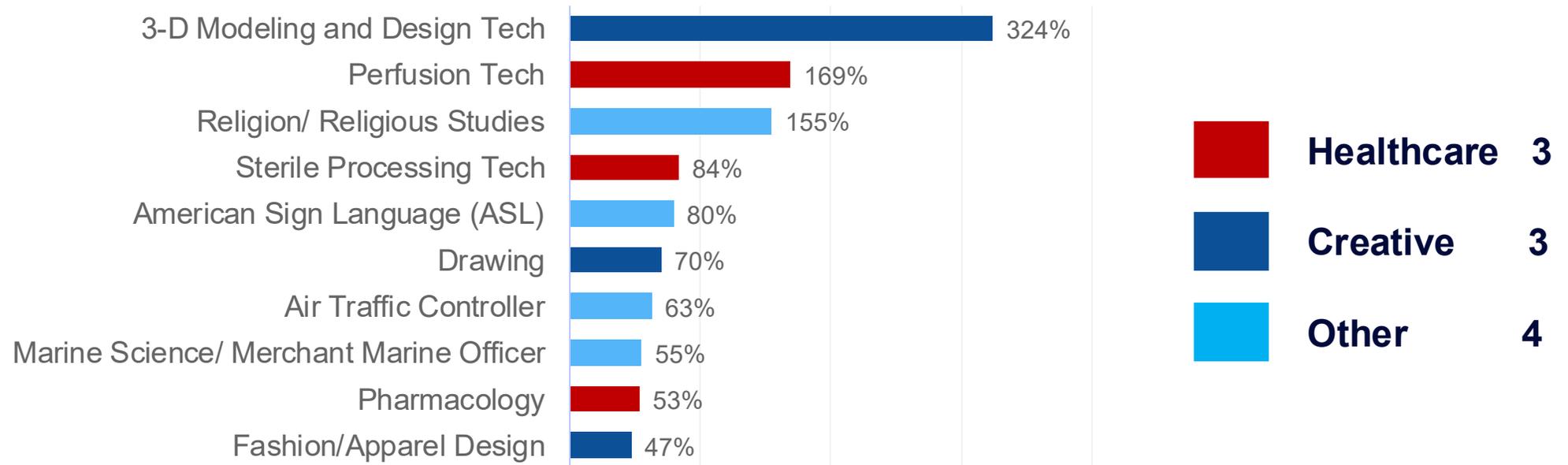
Programs with the Highest Google Search Volumes
November 2025



Google: Fastest-Growing US Search Volumes (all award levels)

In November, searches for 3-D Modeling programs rose 324% year-over-year.*

Programs with the Fastest-Growing Google Search Volume
November 2025 YoY



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What is a Program Evaluation System?

Student Demand Indicators: Enrollment

Employment: Current Indicators

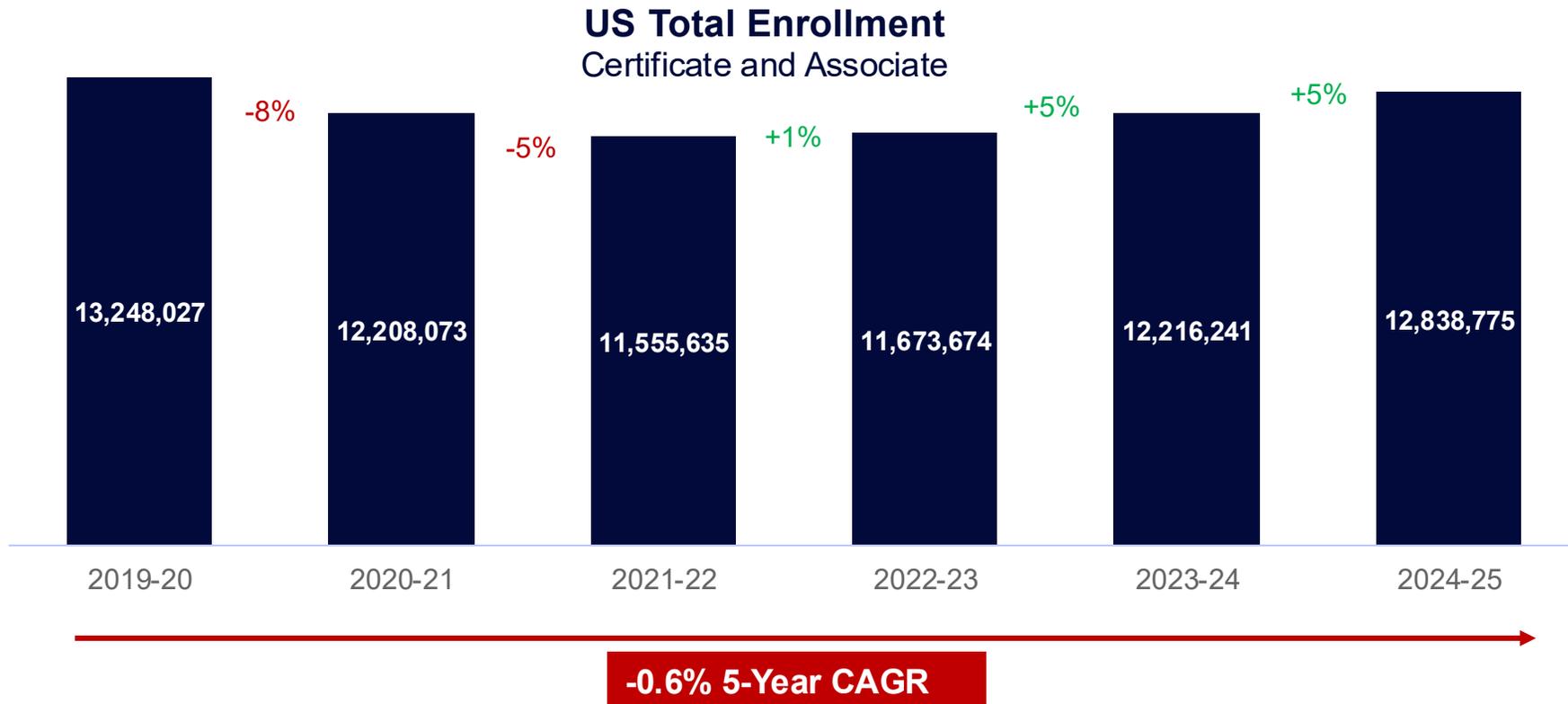
The 12 Days of Program Ideas

Summary

Year-over-year

Total Enrollment: Community Colleges

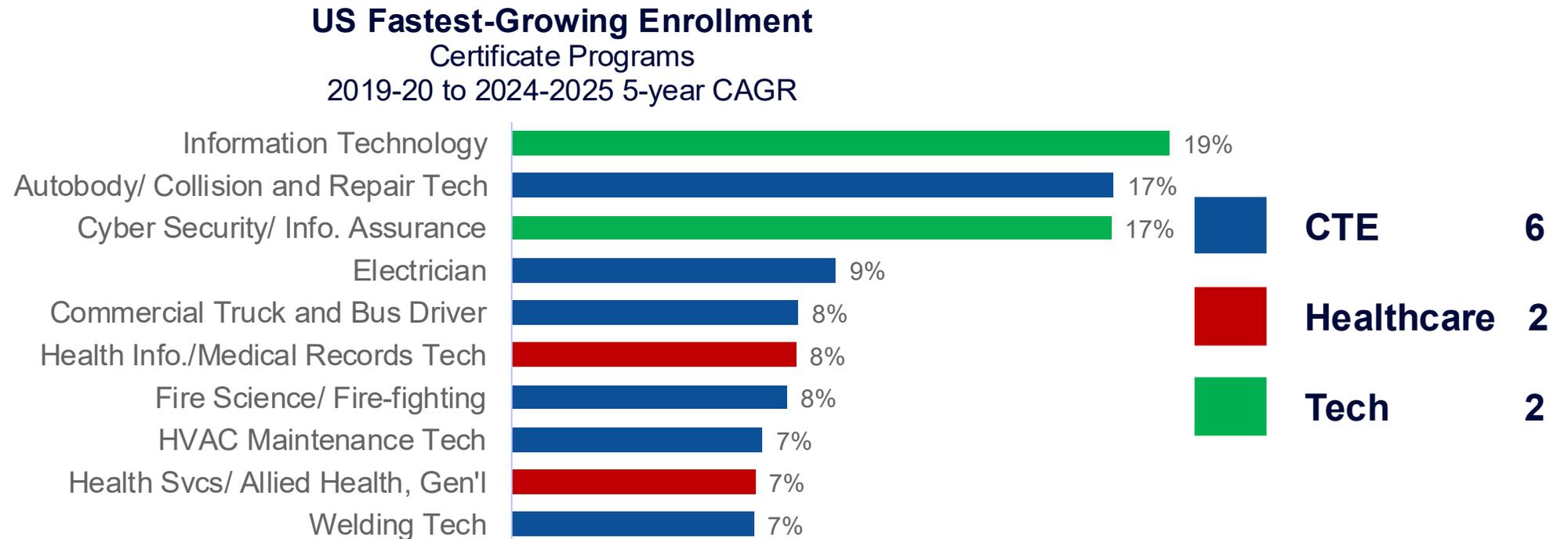
In academic year 2024-25, enrollment grew 5% year-over-year.



Source: Gray DI's PES Program Enrollment Dashboard

Certificate Enrollment: 5-year Growth

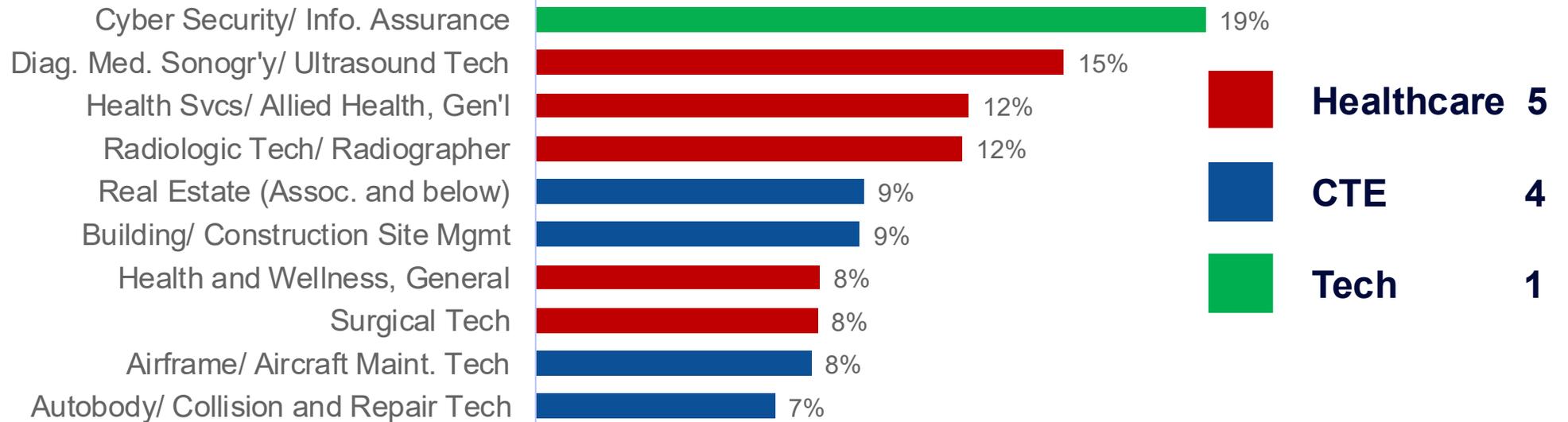
From 2019-20 to 2024-2025, Information Technology enrollment grew 19% on average annually.



Associate Enrollment: 5-year Growth

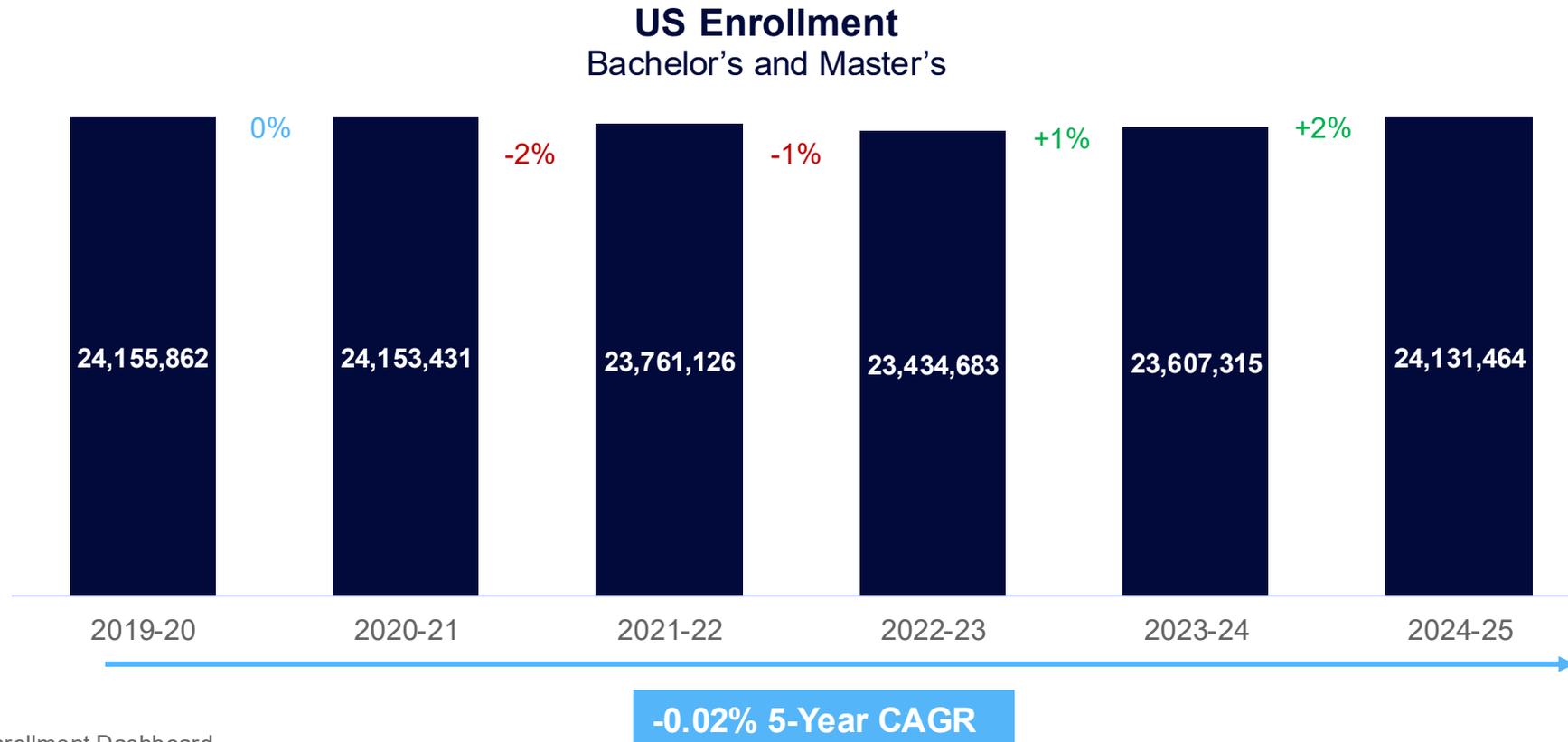
From 2019-20 to 2024-2025, Cybersecurity grew 19% on average annually.

US Fastest-Growing Total Enrollment Associate Programs 2019-20 to 2024-2025 5-year CAGR



Total Enrollment: Bachelor's and Master's

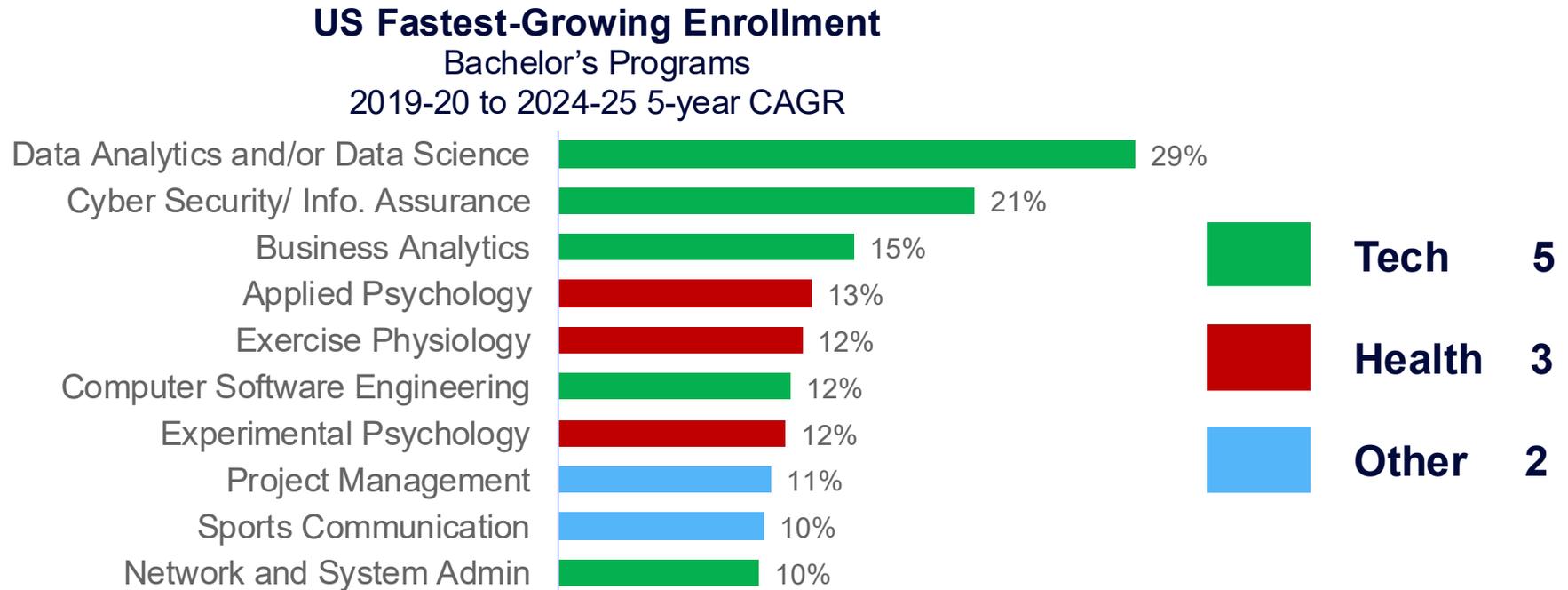
In 2024-25, enrollment grew 2% year-over-year.



Source: Gray DI's PES Program Enrollment Dashboard

Bachelor's Enrollment: 5-Year Growth

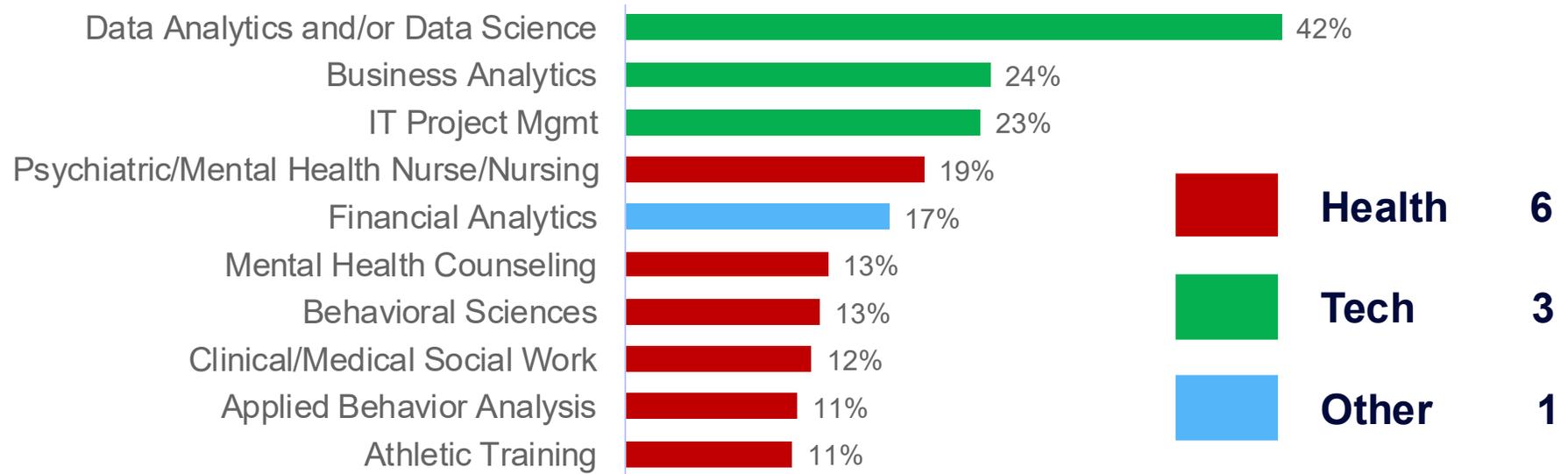
From 2019-20 to 2024-25, Data Science enrollment grew 29% on average annually.



Master's Enrollment: 5-Year Growth

Data Science grew 42% on average annually.

US Fastest-Growing Enrollment Master's Programs 5-year CAGR



Agenda

What is a Program Evaluation System?

Student Demand Indicators: International Demand

Employment: Current Indicators

The 12 Days of Program Ideas

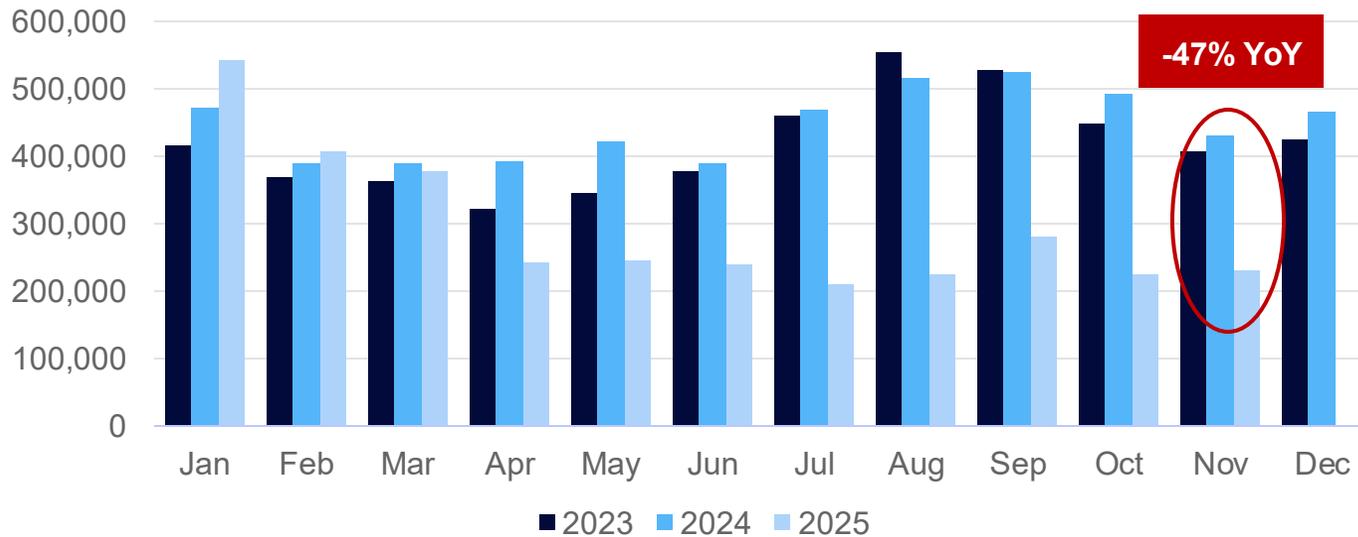
Summary

International Student Demand

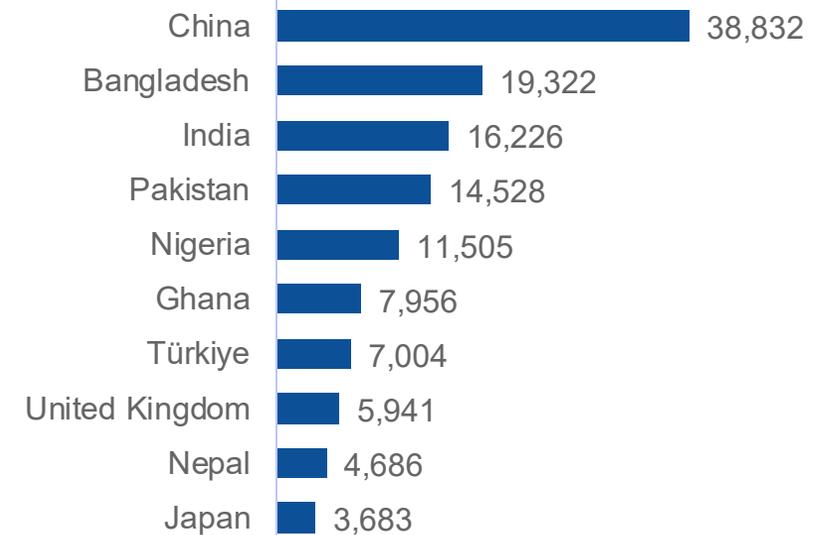
In November 2025, international student interest in US programs fell by 47% year-over-year.*

- Bachelor's grew 41%, Master's fell 58%, and PhD fell 39%.

International Page Views
2023 - 2025



Highest Page Views, Origin Countries
November 2025



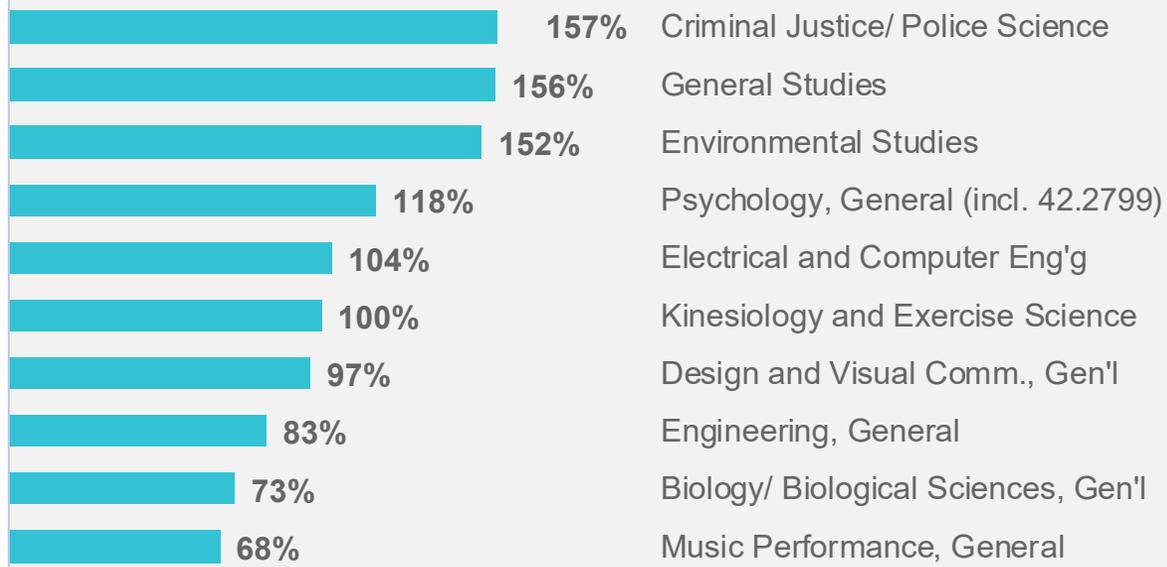
*Bachelor's, Master's, PhD only

International Page Views: Fastest-Growing Programs Year-over-Year

Bachelor's level: Criminal Justice increased the most.

Master's and PhD level: Chemical Engineering page views fell the least.

Fastest-Growing Bachelor's Programs*
November 2025 YoY Change



**Minimum 500 page views November 2025

Slowest-Declining Graduate Programs**
November 2025 YoY Change



**Minimum 1,000 page views November 2025

Agenda

What is a Program Evaluation System?

Student Demand Indicators

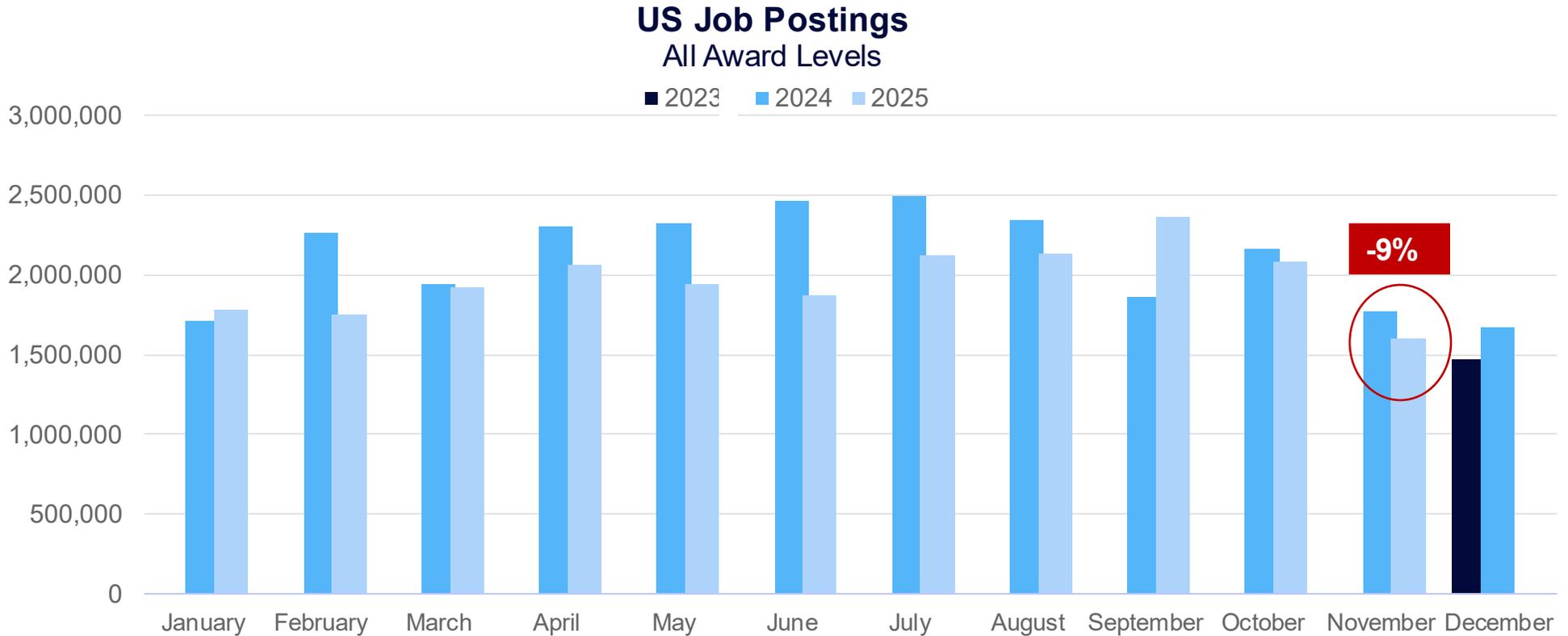
Employment: Current Indicators

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US Job Postings Trends

In November, job postings volume dropped 9% year-over-year.

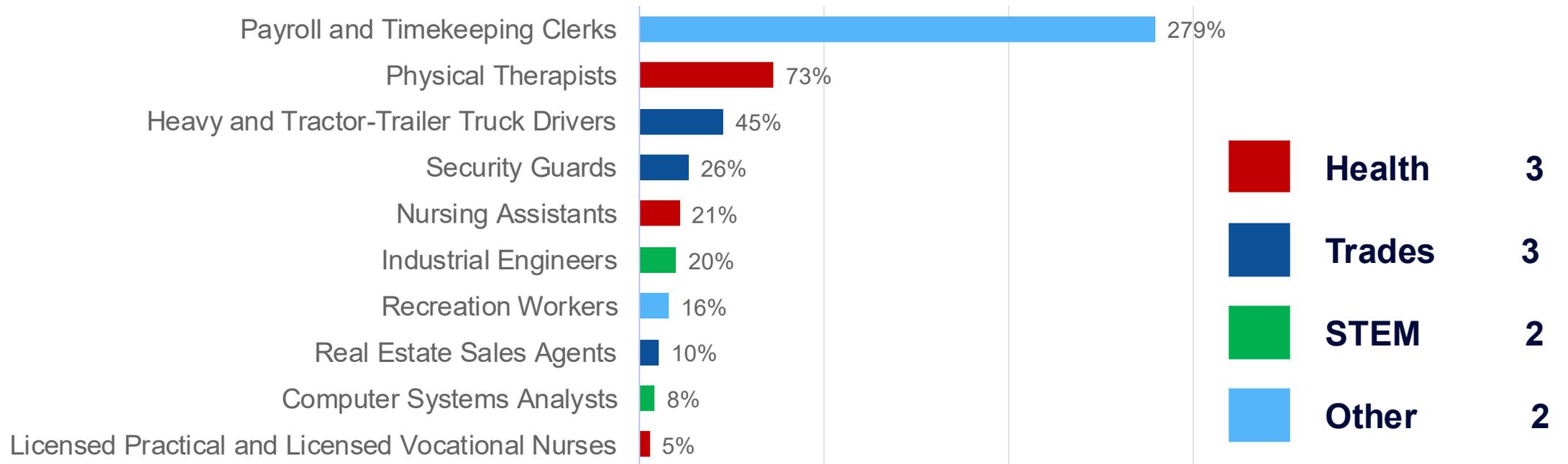


Source: Gray DI's PES Job Postings Dashboard

November Fastest-Growing Job Postings

Fastest-Growing Job Postings by Occupation*

November 2025
YoY Growth

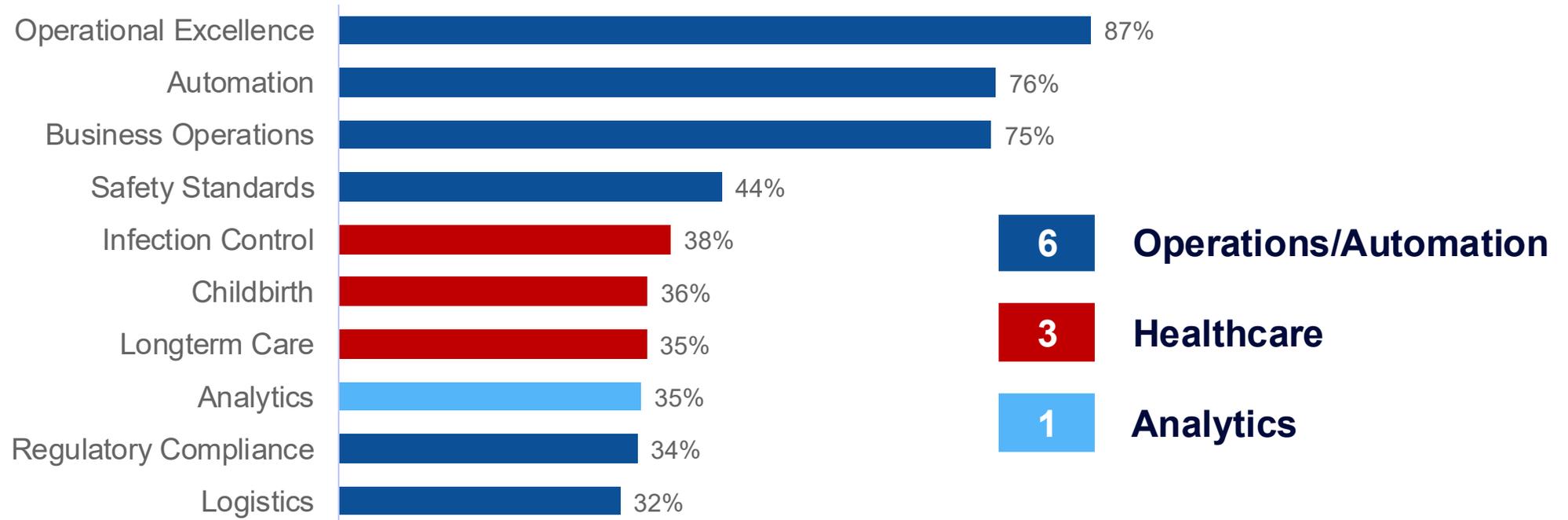


*Excludes unskilled labor
Minimum 5,000 postings November 2025

Which skills are growing in demand in the US?

In November, operations and automation skills had the highest growth in demand YoY.

10 Fastest-Growing Skills Volume in Job Postings
November 2025 YoY



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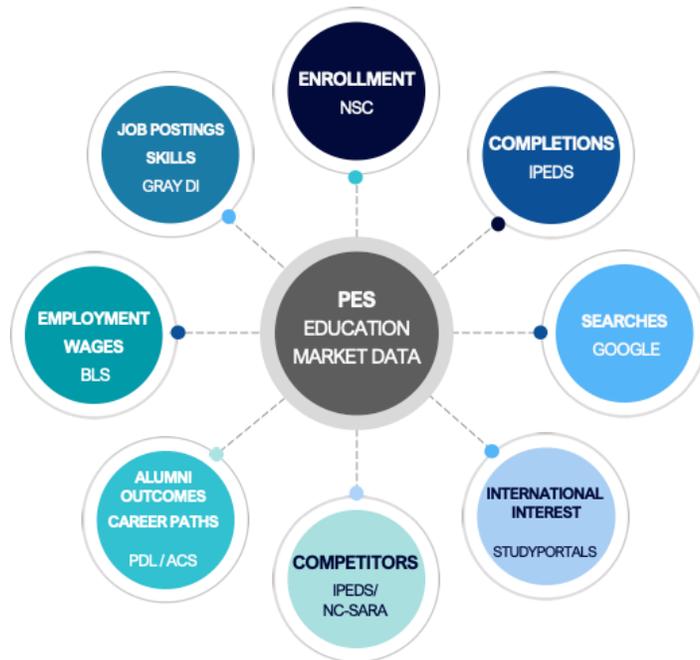
Summary

Gray DI's Methodology: Programs to Start or Grow

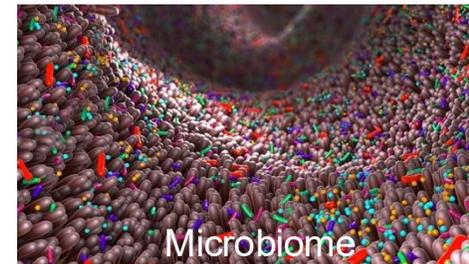
For market data, Gray DI evaluates student demand, employment, and competition.

- We also do custom research on the latest innovations and fields to identify emerging programs.

Market Demand



Emerging Programs Research

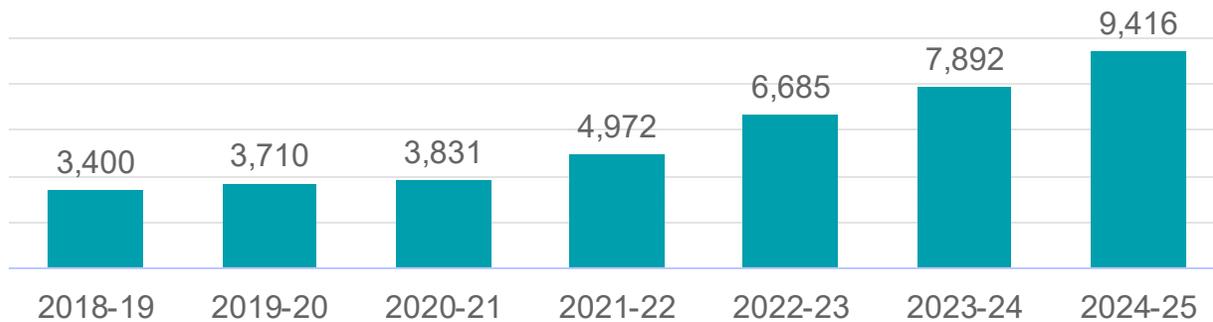


1. Bachelor's: Business Analytics

Business Analytics ranks in the 99th percentile compared to all US bachelor's programs.

- **BLS Current Employment: 118,173 (98th perc)**
- **Post Entry Median Salary: \$93,168 (87th perc)**
- **Top Occupations (Alumni):**
 - Financial Risk and Investment Analysts
 - Marketing Managers
 - Project Managers
 - Management Analysts

US New Enrollment, Bachelor's in Business Analytics

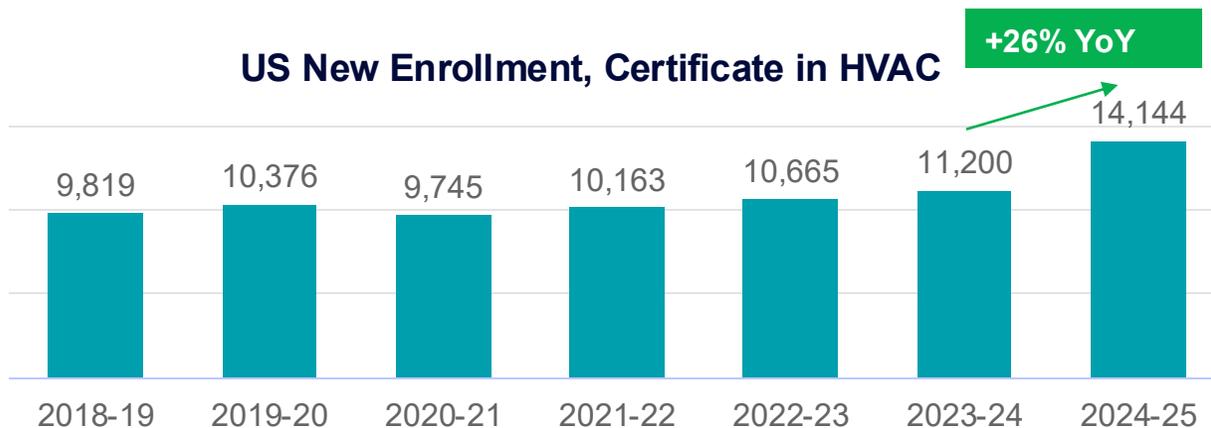


2. Certificate: HVAC Maintenance Tech

HVAC scores in the 99th percentile compared to all undergraduate certificate programs.

- **BLS Current Employment: 180,198** (99th percentile)
- **Graduate Underemployment: 18%** (93rd percentile)
- **Post-entry Median Wages: \$65,734** (69th percentile)
- **Median Program Size: 15** (92nd percentile)

US New Enrollment, Certificate in HVAC



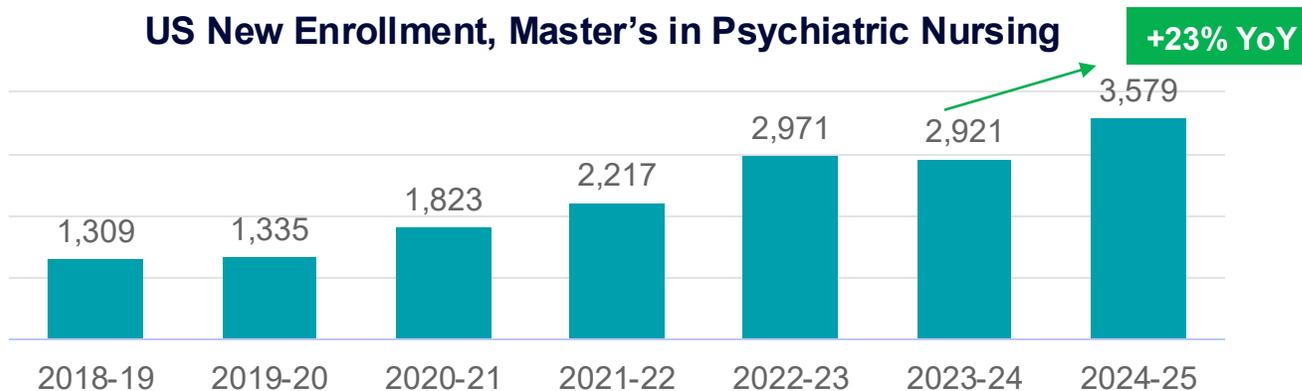
3. Master's: Psychiatric/Mental Health Nursing

Psychiatric/Mental Health Nursing scores in the 97th percentile compared to all master's programs.

- **Strong wages:**
 - Early 25th Percentile: \$102, 989 (97th percentile)
 - Post-entry Median: \$117,967 (86th percentile)
- **Underemployment: 10%** (98th percentile)
- **Completions Volume YoY Change: 36%** (87th percentile)



US New Enrollment, Master's in Psychiatric Nursing +23% YoY



4. Applied AI

Combines expertise in artificial intelligence with domain knowledge in a specific discipline

- AI's global economic impact is expected to be in the **trillions**.
- AI **talent** is – and will continue to be – in high demand.
- AI is accelerating research and development across academic disciplines and fields of study, and changing the way businesses operate.
- The Opportunity for Higher Education:
 - **Artificial Intelligence** programs provide technical expertise to build AI systems and applications.
 - **Interdisciplinary Programs and Specializations** focus on AI applications within particular industries, functions, or fields of research.
 - Applicable across award levels and sectors.



UT Health San Antonio

Doctor of Medicine & MS in Artificial Intelligence

Chandler-Gilbert Community College

Artificial Intelligence and Machine Learning, Bachelor's

Miami Dade College

Applied Artificial Intelligence, Bachelor's
Applied Artificial Intelligence, Associate

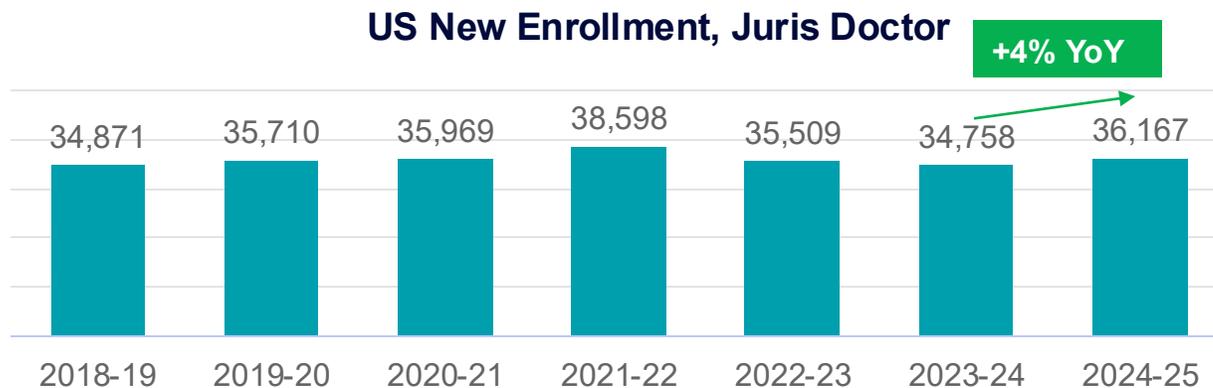
Northeastern University

MPS, AI for Business Ventures
MPS, AI for Finance
MPS, AI for Healthcare
MPS, AI for Human Resources

5. Doctorate: Law

Law scores in the 99th percentile compared to all doctorate programs.

- **Google Search Volume: 3,327,512** (98th percentile)
- **Completions Volume YoY Change (Units): 3,796** (100th percentile)
- **Median Program Size: 168** (99th percentile)
- **BLS Current Employment: 757,568** (100th percentile)
- **Post-Entry Median Wages: \$135,097** (87th percentile)



6. Associate: Dental Hygiene

Dental Hygiene scores in the 99th percentile compared to all associate programs.

What's driving that, given that new enrollment growth isn't steady?

- **BLS Current Employment: 101,396** (98th percentile)
- **Job Postings (one year): 14,677** (98th percentile)
- **Underemployment: 4%** (100th percentile)
- **Post-entry Median Salary: \$73,320** (93rd percentile)
- **Median Program Size: 19** (95th percentile)

US New Enrollment, Associate in Dental Hygiene



7. Computational Social Science

Applying computational approaches to the study of people and their behavior within society.

- Social media influences human behaviors and relationships.
- It also generates enormous amounts of data.
- Modern computational methods enable analysis of these massive data sets, and the relationships embedded within.
- Computational social science seeks to analyze social media (and other) data to provide insights into human behaviors, predict future behaviors, and address societal issues.
- Career opportunities in data science and social social-focused roles for social media, technology, healthcare firms, government, NGOs, academia

Program Examples

- University of Pittsburgh: BS in Computational Social Science
- University of California San Diego: MS in Computational Social Science



8. Creator Economy

The creator economy includes creators and tools that drive social engagement and commerce.

- Creators monetize their creations, activities, skills, knowledge, and personal brands, generating income from consumers, advertisers, and affiliate partners.
- Social media is driving social commerce and the creator economy.
- More kids want to be YouTube stars than astronauts.
- The creator economy is driving demand for new skill sets and creating new “jobs.”
- Institutions are including digital marketing and social media in the curriculum.
- Some are starting to offer programs for creators themselves.
 - Univ of Texas San Antonio launched a **BA in Digital Media Influence**
 - Owens Community College: **Media Influencer Certificate**.
 - Arkansas State University launched an undergraduate certificate for **Athlete Name, Image, and Likeness (NIL) Promotion**



“Their posts seem frivolous. Their business isn’t.”

– The Economist

9. Master's: Artificial Intelligence

Artificial Intelligence ranks in the 98th percentile.

- Evaluate an AI program... using AI!

The program displays strong demand and favorable employment outcomes but faces significant competitive challenges due to the high number of institutions offering similar programs.

Overview

With National Completions at 1,274, placing it in the 91st percentile, the program demonstrates robust student interest and successful graduate outcomes. However, the high number of institutions offering similar programs, ranking poorly in the 10th percentile for Institutions with Online In-Market Students, signifies intense competition. Increased marketing resources may be required to maintain its competitive edge in this saturated market.

Student Demand

The program exhibits strong student demand, with Google Search Volume reaching 567,750, ranking in the 87th percentile. Additionally, the New Student Enrollment Volume stands at 4,194, an impressive 96th percentile, with a YoY Unit Change of 1,871, which places it in the 99th percentile. The Google Search YoY Percentage Change at 21% indicates growing interest, ranking in the 72nd percentile. On-ground Completions at In-Market Institutions reach 1,075, placing it in the 92nd percentile, suggesting a solid on-ground presence. The sum of On-ground and Online Completions at 1,274, holding the 91st percentile, further underscores the program's appeal.

Employment

The program's graduates benefit from competitive employment prospects, with an Entry Level Salary of \$105,651, ranking in the 97th percentile. The Post Entry Level Median Salary is substantial at \$126,619, falling in the 96th percentile. Nonetheless, the Job Postings per Graduate stands at 0.9, only in the 50th percentile, indicating a moderate job market tightness. BLS 1-Year Historical Growth reflects a limited increase at 1%, poorly positioned in the 8th percentile, while the 3-Year Growth fares better at 4% in the 57th percentile. The Underemployed Percent of Graduates is 31%, which, though not ideal, is in the 68th percentile, indicating moderately favorable employment alignment.

Competitive Intensity

The program experiences significant competitive intensity, indicated by 53 Campuses with Graduates, in the 10th percentile. The high Median Program Completions at 9, positioned in the 87th percentile, suggests a high volume of competing graduates. A low Google Search Cost per Click of \$13.00, however, ranks in the 19th percentile, allowing potentially lower marketing costs. The Google Competition Index markedly indicates stiff competition at 0.71, positioning in the 2nd percentile. National Online Percent of Completions at 16% falls within the 43rd percentile, illustrating moderate online program availability.

10. The Science of Well-Being

The “science of well-being” focuses on identifying, measuring, and nurturing behaviors and activities that promote positivity.

- Well-being encompasses physical and emotional health.
- It includes **personal** and **societal** well-being.
- Assessments can be **subjective** and **objective**.
- It is hard to define and difficult to measure, but interest in the field is growing.
- The Science of Well-Being is the most popular course on Coursera, with almost **5 million** enrolled as of October 2025
- Colleges and universities are introducing discipline-specific programs related to positive psychology and health and wellness.
 - University of Pennsylvania College of Liberal and Professional Studies: **Master of Applied Positive Psychology**
 - Emory University: Health and Wellness Coaching Certificate
- An opportunity exists for holistic, multi-disciplinary programs that encompass the broad range of topics associated with the science of well-being.



11. Cellular Agriculture

“Farming” of agricultural products from cells rather than from whole plants or animals

- Products are biologically the same (or very near the same) as their traditionally-sourced counterparts, but they are grown in a laboratory rather than raised as livestock on a farm.
- Processes involved in cellular agriculture include tissue engineering and fermentation.
- Moving from Precommercial to Commercial stage, but slowly
- Lack of a trained workforce could delay research and adoption
- University research examples: Tufts University, UC Davis

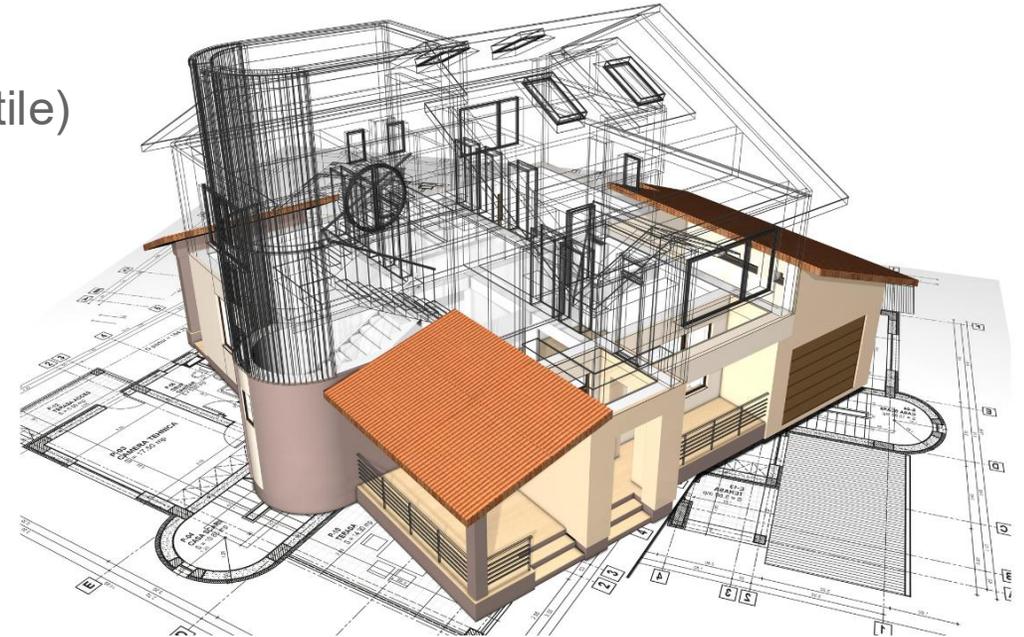
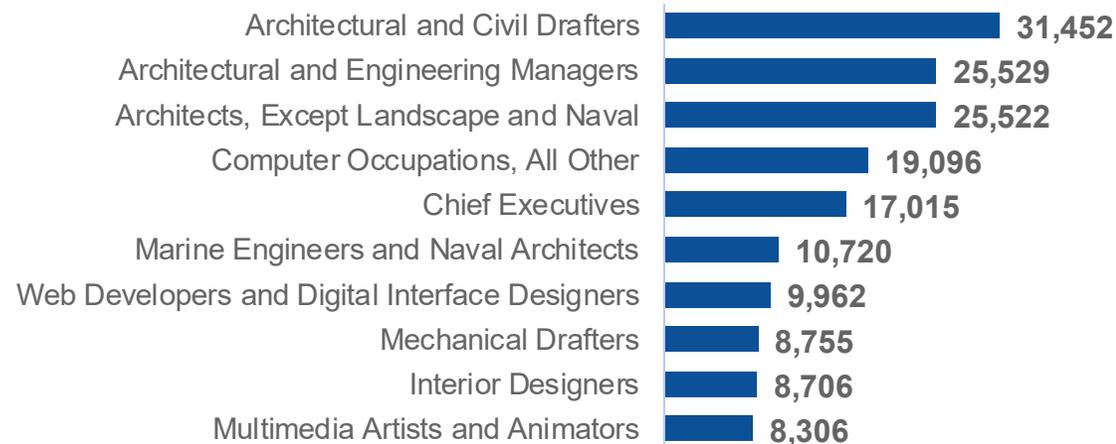


12. Bachelor's: Architecture (incl. Building Tech)

Architecture scores in the 98th percentile.

- **Median Program Size: 44** (98th percentile)
- **International Page Views (12 months): 6,470** (98th percentile)
- **BLS Current Employment: 53,174** (95th percentile)

Top 10 Occupations, Bachelor's in Architecture First Four Jobs



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Summary

- In November, Google searches for academic programs fell 29% year-over-year.
 - Registered Nursing had the highest search volume at the community college level.
 - Economics had the highest at the transfer and above levels.
 - AI searches may be cannibalizing traditional search.
- In 2024-25, enrollment at community college level grew 5% year-over-year.
 - At the bachelor's and master's levels, it grew 2%.
- From 2019–20 to 2024–25, fastest-growing average annual enrollment by award level:
 - Certificate: Information Technology
 - Associate: Cybersecurity
 - Bachelor's and Master's: Data Science
- In November, US job postings fell by 9% year-over-year.
 - Demand for Payroll and Timekeeping Clerks grew the most.
- Don't forget to register for our 5 Emerging Programs to Watch webinar, 2 PM on January 15, 2026!

Upcoming Webinars

January 15th
2 PM ET

Join us for our most popular webinar!



January 29th
2 PM ET

Demand Trends Monthly Webinar

