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EDUCATION
DYNAMICS

RW Jones

Landscape of Higher Education Report

Higher Ed's Strategic Imperative for
Transformation in a Shifting Landscape

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Executive Summary

Higher education is entering a decade of structural change where volatility will be the norm, not the exception. Economic instability, demographic decline and the disruptive power of AI are converging into a defining question for higher education leaders: *Will your institution shape the future, or be shaped by it?*

The Market Reality

Traditional student enrollment base has peaked. Beginning in 2026, institutions will largely face a sustained decline in traditional-aged undergraduates. Meanwhile, enrollment growth is concentrated in new markets: adult learners seeking rapid reskilling, high school students accelerating through dual enrollment and the millions of Americans with “some college, no credential” who remain a significant scalable opportunity for growth.

The impact will not be felt evenly across institutions. Some layers of immunity are built into the higher education infrastructure for flagship public institutions and highly selective private institutions with substantial endowments. The remaining institutions are more exposed to the shifts described in this summary and report. Institutions that cling to historic student pipelines and insist on trying to hold onto the status quo will face contraction. Those that pivot decisively will build a sustainable future for growth, based on serving the *Modern Learner* of today and the future.

The Value Imperative

While the data proves the enduring wage premium of a college degree, public skepticism of higher education’s value continues to deepen. Institutions cannot afford passive defense of the status quo. To win trust, institutions must lead boldly with outcomes by publishing transparent data, strengthening employer partnerships and showing tangible career pathways in every program. This is not just marketing; it is a blueprint for a sustainable foundation and future growth.

The Technology Shift

Artificial Intelligence has redefined both how students search and how graduates work. AI-driven tools are already guiding prospective students’ choices, often before a college has the chance to engage them. In today’s evolving search environment, an institution must deploy new strategies to build and maintain discoverability and communicate value, outcomes and brand in an online environment that now includes AI engines in addition to social media and the traditional search experience.

At the same time, AI is reshaping the skills required for long-term employability. Institutions that weave AI literacy into programs, while doubling down on human skills like judgment, creativity and ethical reasoning, will produce graduates who thrive in a future where people and machines work side by side.

Leadership Imperatives

The message of this report is clear: status quo protectionism and incrementalism are a recipe for irrelevance. Leaders must drive transformation across three dimensions:

- 01 Portfolio** – Invest in high-demand, career-oriented programs while sunsetting underperforming offerings.
- 02 Positioning** – Unify brand and enrollment strategies to speak with one clear voice to all *Modern Learners* AND meet the learner where they are, while reinforcing the three critical messaging components of cost, convenience and career outcomes.
- 03 Culture** – Instill a student-centric culture built on values and outcomes. Invest boldly to communicate value and deliver on the promise of the long-term return on investment in higher education.

A Defining Moment

This is a once-in-a-generation leadership moment. Leaders who embrace the disruption as opportunity will not only safeguard institutional sustainability, but they will also redefine the role of higher education in the life of the *Modern Learner*. Those who hesitate or fail to act decisively risk falling behind in a marketplace that is now unforgiving.

EducationDynamics stands ready to partner with institutions who are prepared to act boldly and leaders who recognize that meeting the *Modern Learner* where they are is not just an enrollment strategy, but the new mission of higher education itself.

Key Takeaways

Unlocking the Levers of Growth



Key Takeaway 1

An Unstable Economic and Employment Landscape

Uncertainty and instability are the new constants in a global economy undergoing significant structural change. The labor market is defined by inconsistent and fluctuating indicators that make future trends difficult to predict. While overall unemployment remains relatively low, this top-line number masks underlying weaknesses, including weak job creation and lower employee quit rates, which signal widespread economic anxiety and a workforce hesitant to make bold career moves. This creates a challenging environment where the traditional promise of a degree needs to be more compelling than ever.

Amid this instability, a fundamental paradox has emerged: a college education maintains a strong, undeniable correlation with higher employment rates, yet the public's perception of its value is in a steep and steady decline. This misaligned narrative puts immense pressure on institutions to reclaim their story. In a marketplace now defined by disruption and deep-seated skepticism, it is no longer enough to simply possess value; you must aggressively, transparently and relentlessly prove your return on investment to every prospective student and continue to reinforce this message with all stakeholders, including your students, alumni, industry and politicians.



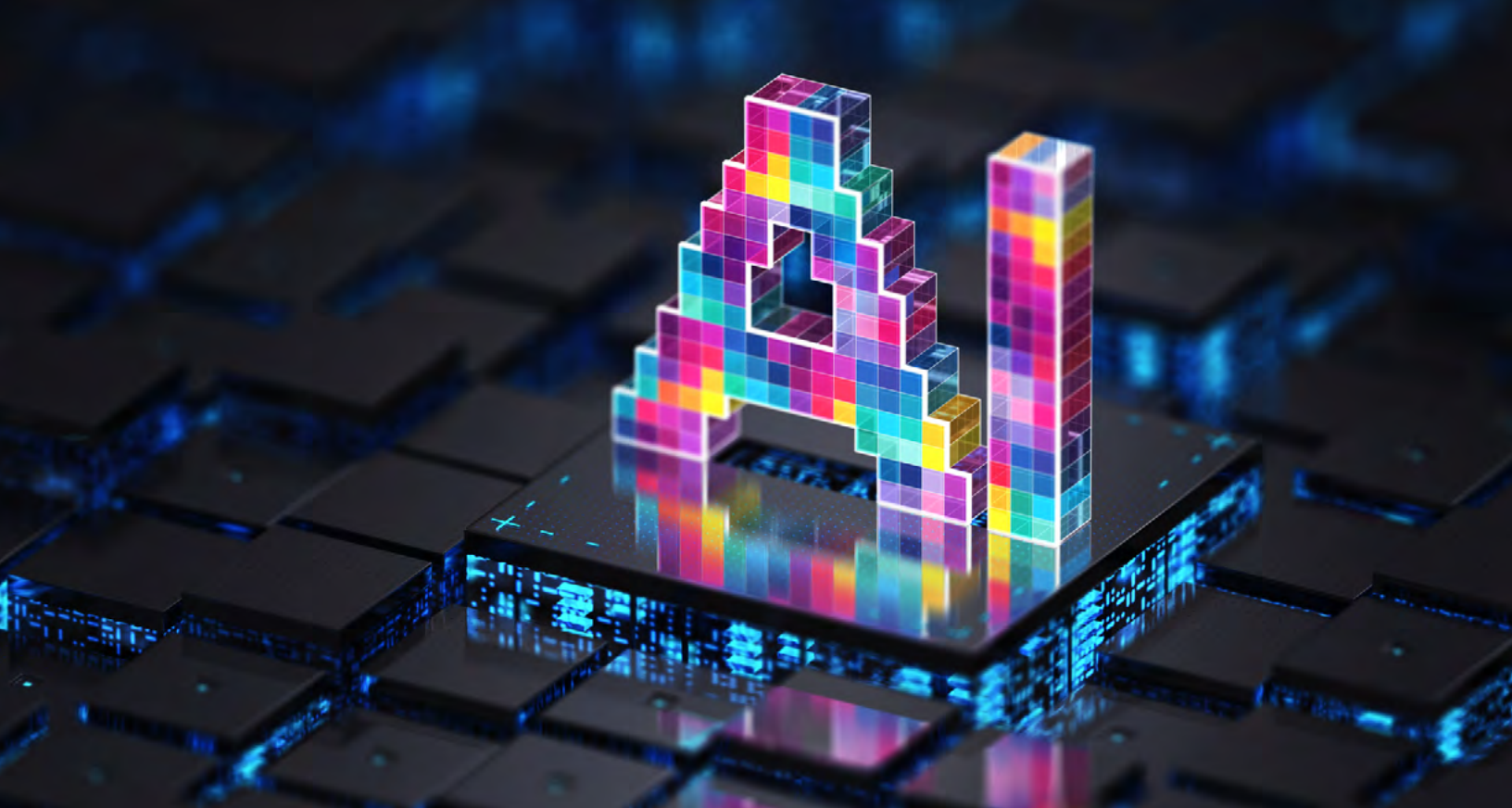
Key Takeaway 2

A Radically Transformed Enrollment Environment

The enrollment environment has not just evolved; it has been radically and permanently transformed. While fall 2024 showed surface-level enrollment growth, this figure conceals faults in the foundation. The demographic cliff is no longer a future threat to be discussed in boardrooms; it is a present reality that is impacting recruitment funnels today. Fall 2025 was the demographic high-water mark for traditional-aged undergraduates. If current enrollment rates hold, institutions must prepare for a sharp, sustained decline in traditional undergraduate-aged students beginning in 2026 and continuing into the foreseeable future. Transformative leaders are already acting with urgent focus to attract and serve previously underserved student markets. The lessons from these trends are an unmistakable call to action.

Growth is now driven by non-traditional populations. Adult learners seeking to upskill in a volatile economy, ambitious dual-enrollment high school students accelerating their path to a degree and professionals returning to complete a credential are the new lifeblood of enrollment. For decades, these students were a secondary consideration. Today, they are the primary market. Institutions that fail to transform their programs, marketing and support services to this new reality will not just stagnate; they will become irrelevant.

Demand is shifting at the degree and programmatic levels. The continued enrollment growth in community colleges and certificate programs underscores the Modern Learner's laser focus on career alignment, speed to completion and a tangible return on their educational investment. Meanwhile, programmatic growth is concentrated in career-focused fields like healthcare, technology and business, while traditional pillars like the humanities and social sciences face contraction. This is not an indictment of liberal arts education, but a clear signal that all programs must now answer the question: "What is the path to a sustainable career?"



Key Takeaway 3

AI is An Unmistakable Force with Far-Reaching Implications

The most potent accelerant of this transformation is the rapid integration of Artificial Intelligence (AI). AI is not a new tool. The technology has been around for well over a decade. However, it is a disruptive force fundamentally rewiring the world around us. Its impact is multifold. It has shattered the student recruitment funnel while simultaneously, transforming the academic and learning process and redefining the very nature of a future-proof career.

Modern Learners have already adopted AI as a trusted tool for information gathering. Everything from student search to retention is now impacted by AI in some way. This shift is reshaping marketing channels in real time and turning the student journey into a self-directed, hyper-personalized process.

AI's integration into the workforce creates an additional pressure point for both institution and student. The role of AI in the future of work creates deep uncertainty for students, who now question if their chosen field will even exist in a decade. This places a new imperative on institutions: to deliver an education that not only imparts knowledge but also cultivates uniquely human skills like critical thinking, ethical reasoning and creativity, all while building deep AI literacy. The value of a degree must now be considered by its ability to prepare graduates to thrive in a collaborative future with intelligent machines.



Key Takeaway 4

A Mandate for Transformative Leadership

In an era of constant disruption, incremental adjustments and siloed thinking are recipes for failure. The data presented in this report is a mandate for a fundamental, institution-wide shift in strategy and a focus on pulling the right levers to drive growth and revenue. Survival and, ultimately, success now depend on abandoning outdated structures and embracing a unified institutional strategy centered unequivocally on the Modern Learner.

- 01 Align Program Portfolios with High-Growth Sectors:** The market has spoken and its message is clear. Institutions must move beyond tradition-bound curriculum committees and implement a rigorous, data-driven process to evaluate their program offerings. This means actively investing in programs that align with current and future labor market demands and provide students with clear pathways to successful, high-mobility careers. It also requires the leadership and courage to sunset underperforming programs that no longer serve a clear market need, reallocating those resources toward innovation and growth.
- 02 Embrace a Unified Brand and Enrollment Strategy:** The lines between student populations—undergraduate, graduate, online, adult—have effectively been erased by the Modern Learner mindset. The resounding message from all Modern Learners is a focus on three key components of higher education: cost, convenience and career outcomes. This unified approach optimizes limited campus resources, effectively engages all Modern Learners and serves as a blueprint for growth.

A fragmented strategy that relies on siloed departments to recruit these students as afterthoughts is destined to fail in this new environment. A disconnected message that fails to communicate what students value most is rejected by your key audience. In contrast, a truly unified strategy centralizes brand messaging, marketing resources and enrollment processes, allowing institutions to engage all prospective students efficiently and effectively with a consistent, compelling narrative tailored to their individual needs and pathways.

- 03 Lead the Conversation on Value and Outcomes:** With the public's perception of higher education's value eroding, institutions can no longer afford to be passive. Leaders must proactively and transparently communicate their worth in the language of the Modern Learner. This means moving beyond vague platitudes and focusing on measurable career outcomes, tangible student success stories and the hard data that demonstrates a positive return on their educational investment. Remember: data is knowledge and knowledge is power. Use your outcomes data to build an unassailable case for your institution's enduring value.

This is Not Business as Usual. This is What's Next.

The future of higher education belongs to those willing to build it. We're not waiting for enrollment trends to rebound or for funding streams to stabilize. We believe growth is possible, sustainable and measurable when institutions take control of their narrative and align their strategies around what really moves the needle.

Brent Ramdin, CEO of EducationDynamics



Labor Market Landscape

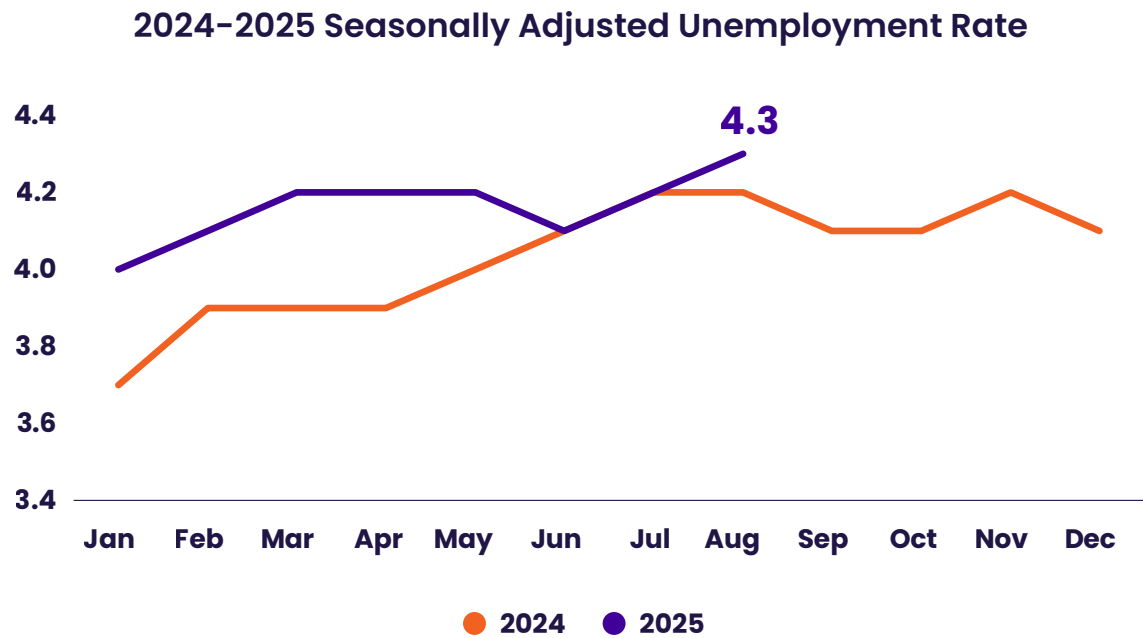
The U.S. labor market serves as both a bellwether and a driver for higher education. The structural shifts occurring in the economy and labor market serve as a call to action for fundamental change to both meet and shape the future employment landscape and global economy. After several years of sustained post-pandemic growth, employers are cautious to fund growth, resulting in slow job creation and diminishing the bargaining power of job seekers and employees.

At the same time, the nature of work and careers is evolving due to technological, social and demographic factors. As technology drives innovation and evolution, workers are forced to invest in upskilling and reskilling to remain relevant and productive. Workers and their employers are turning to higher education to support continuous learning, seeking out solutions that deliver on the promise of higher education.

Innovative leaders are defining new ways to deliver outcomes-focused and career-relevant education pathways that are convenient, flexible and cost effective while delivering immediate returns and long-term value. Designing alternative credentials and providing programs aligned directly to high-demand careers is among the most impactful opportunities for both workers and institutions.

Unemployment Trends: Signs of Economic Distress Are Emerging

Unemployment has begun to rise after several years of stability, signaling that workers have fewer options and less mobility than in the recent past. As job security weakens, institutions are under increased pressure to show clear career outcomes. Colleges that foreground job placement, applied learning and direct employer partnerships can position themselves as the safest route through economic uncertainty.

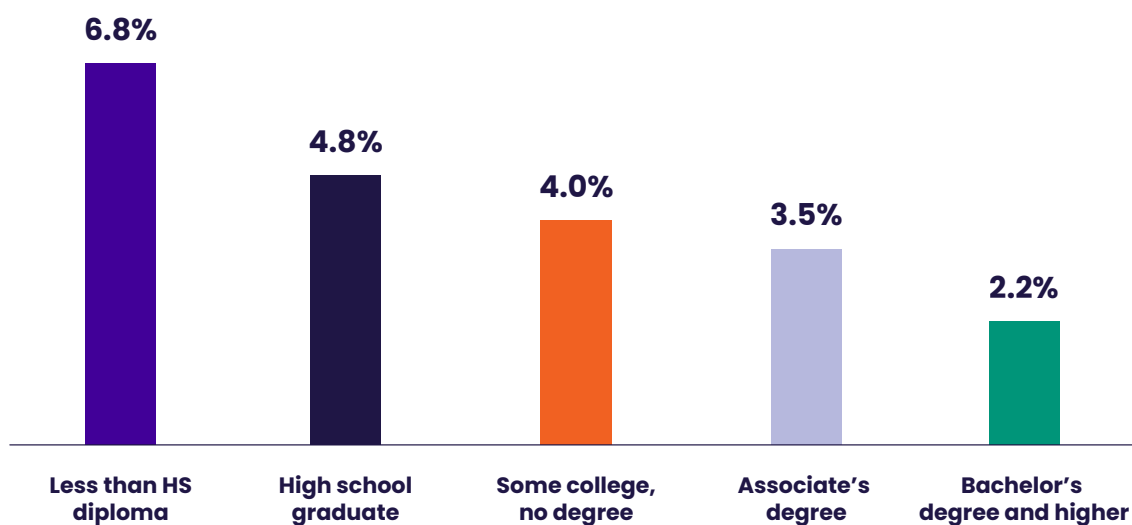


Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted Unemployment Rate

Unemployment Rate Gaps by Education Level

Educational attainment continues to insulate individuals against economic downturns. Workers with bachelor's degrees and higher maintain stronger employment prospects than those without post-secondary education. This widening gap underscores the long-term payoff of higher education in real economic terms.

Unemployment Rate Gaps are Widening



Source: U.S. Bureau of Labor Statistics, June 2025 Monthly unemployment by educational attainment



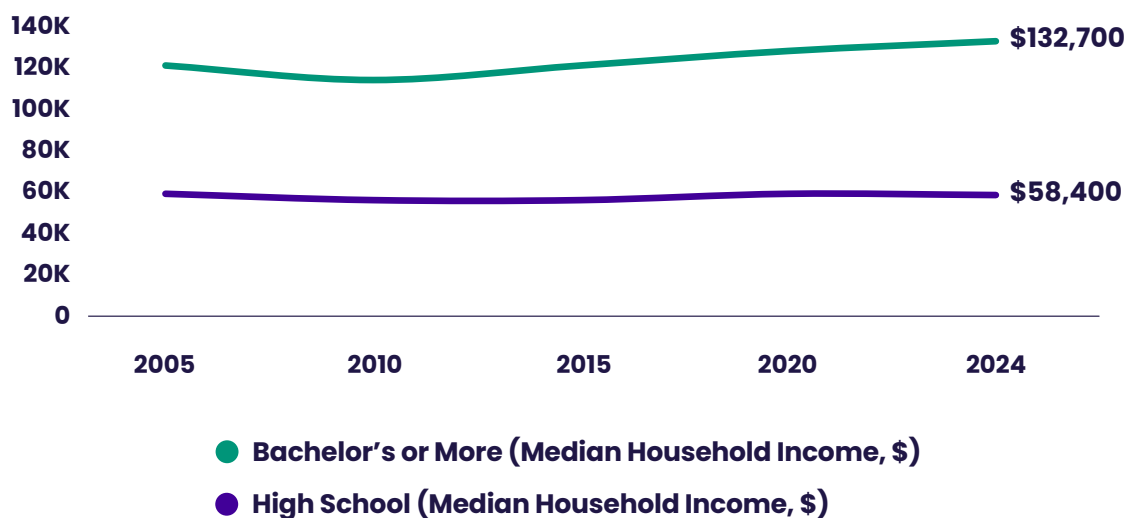
The Income Premium of Higher Education

Over the past three decades, the income advantage of higher education has remained strikingly consistent. In 2024, households led by adults with at least a bachelor's degree earned a median income of \$132,700 - more than double the \$58,400 median income of households with only a high school diploma.

While both groups have experienced economic fluctuations tied to recessions and broader labor market shifts, the long-term divergence is clear. Even during downturns, households headed by those holding a bachelor's degree maintained a significant earnings buffer.

This widening income gap reinforces the argument that higher education is not simply about immediate job placement but about building durable economic security across a lifetime. For institutions, this is a powerful narrative to underscore ROI for prospective students and families who may be questioning the cost of college. At the same time, the data emphasizes: without access to affordable and flexible postsecondary pathways, workers without degrees risk being left behind in an economy where education continues to drive opportunity.

Median Household Income by Educational Attainment



Source: U.S. Census Bureau, Current Population Survey (CPS); Adjusted to 2024 dollars; 2005-2024.

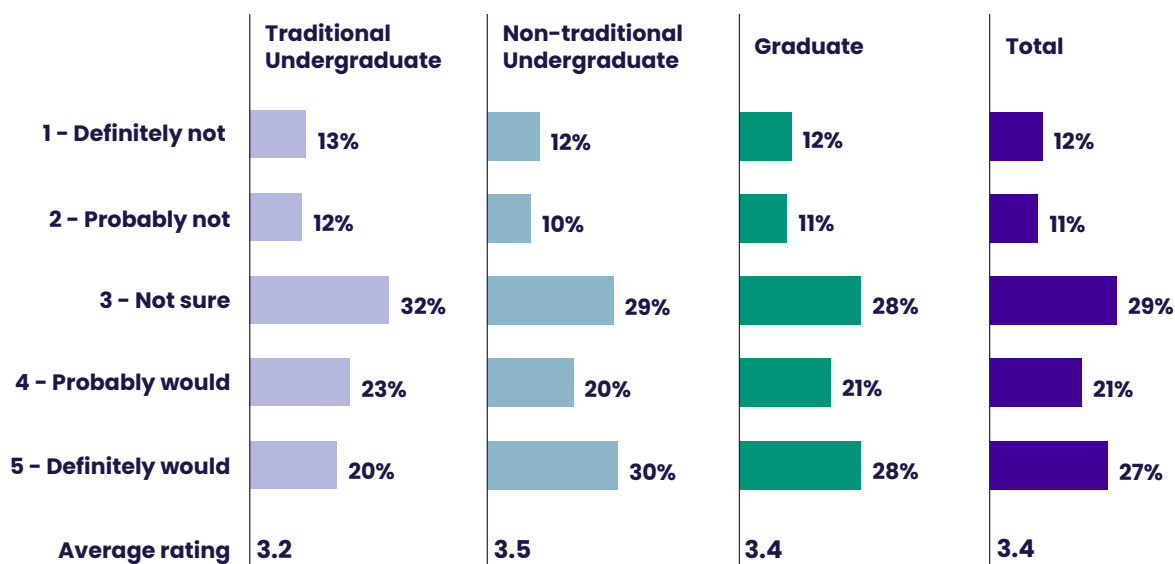
Continuous Education and the Modern Labor Market

While unemployment rates clearly highlight the economic insulation higher education provides, it is increasingly important to recognize that education is no longer a one-time event that is completed early in life. The traditional model is being challenged by rapid shifts in technology, automation and employer skill requirements.

Modern learners are navigating a labor market that demands continuous education and skill development. From graduate degrees to stackable credentials, professional certificates and short-cycle training programs, today's workforce requires flexible pathways to remain competitive. This reality underscores the widening gap in unemployment rates by education level: while a bachelor's degree or higher continues to provide insulation, ongoing upskilling and reskilling are now essential to sustain employability and career mobility across the entire span of working life.

For higher education institutions, the takeaway is clear: success depends on delivering programs that align with durable labor market demand while also meeting the modern learner's need for lifelong learning opportunities. Credentials that are career-relevant, adaptable and stackable will be the cornerstone of maintaining employment resilience in an economy where change is constant.

Likelihood of Enrolling in Another Credential at Your Current School

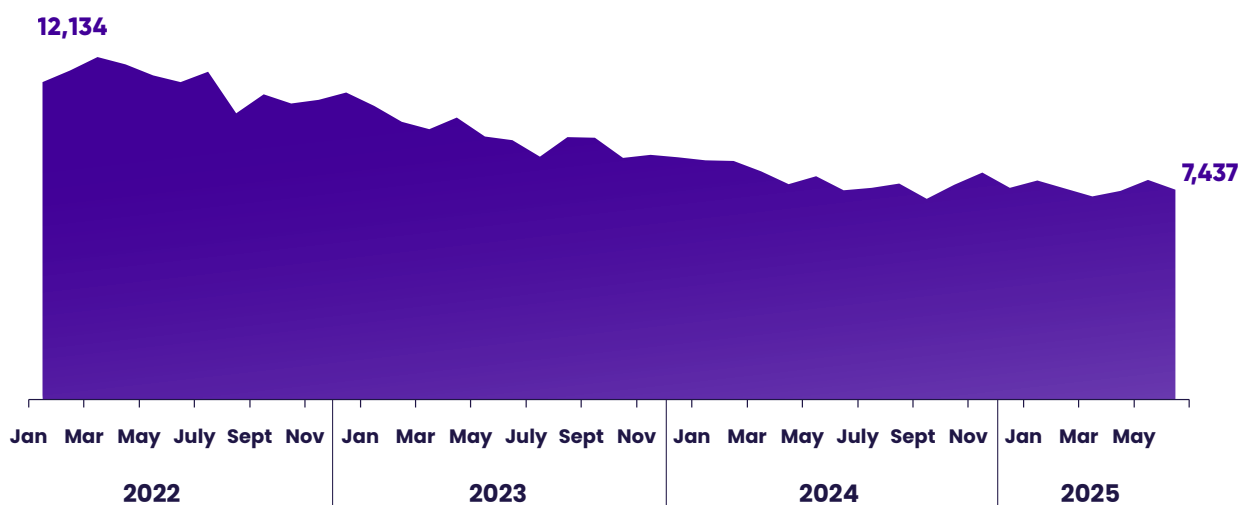


Source: Modern Learner Survey 2025

Job Openings and Worker Confidence

Job openings have contracted significantly, falling from more than 11 million in 2022 to under 8 million in 2025. This marks a notable cooling in labor demand after the record highs of the post-pandemic recovery. Fewer openings signal that employers are pulling back on aggressive hiring and becoming more selective in their recruitment. For prospective students, this means that the pathways into new jobs are narrowing. Skills, credentials and experience can help job seekers differentiate themselves, while institutions can partner with local employers to design programs to deliver and support the acquisition of each.

Seasonally Adjusted Job Openings 2022-2025 Job Openings and Labor Turnover Survey

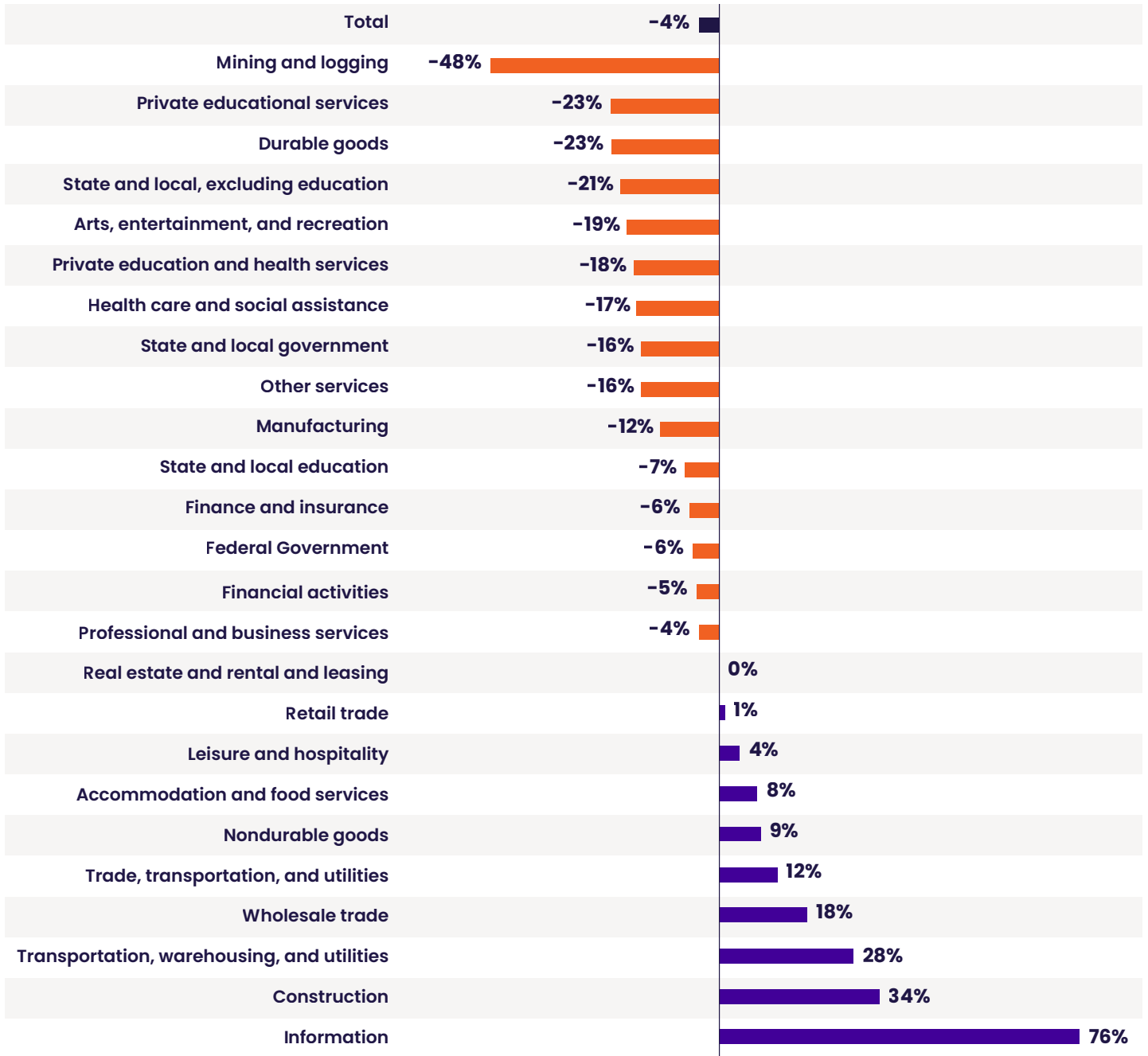


Source: JOLTS, 2022-2025

The job openings volatility across industries underscores a structural shift in how Americans engage with work and by extension, how they must engage with education. Fields once viewed as stable, such as education and health care, are experiencing contractions, while growth is accelerating in technology, infrastructure and logistics. This divergence challenges the assumption that a single degree early in life can ensure lifelong stability.

For higher education institutions, the opportunity lies in repositioning themselves as lifelong learning partners rather than one-time credential providers.

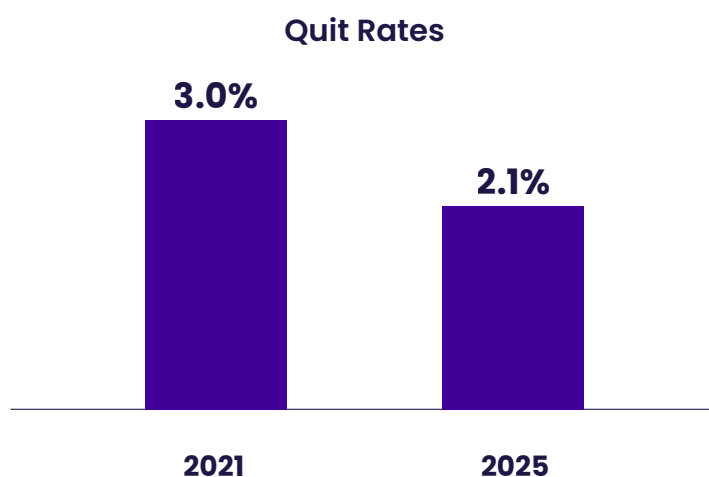
Seasonally Adjusted Job Openings % Change July 2024 to July 2025 by Industry



Source: BLS Seasonally Adjusted Job Openings % Change July 2024 to July 2025

Quit Rates

Over the past four years, voluntary quit rates have slowed significantly, an indicator that worker confidence is eroding. In recent years, the “Great Resignation” reflected optimism that employees could leave one job and quickly find another, often at higher pay. That dynamic has faded. With fewer workers willing to gamble on uncertain career moves, mobility is declining across many sectors. This signals that adult learners will only return to higher education if institutions offer flexible formats, affordable pathways and credentials with unmistakable labor market value.



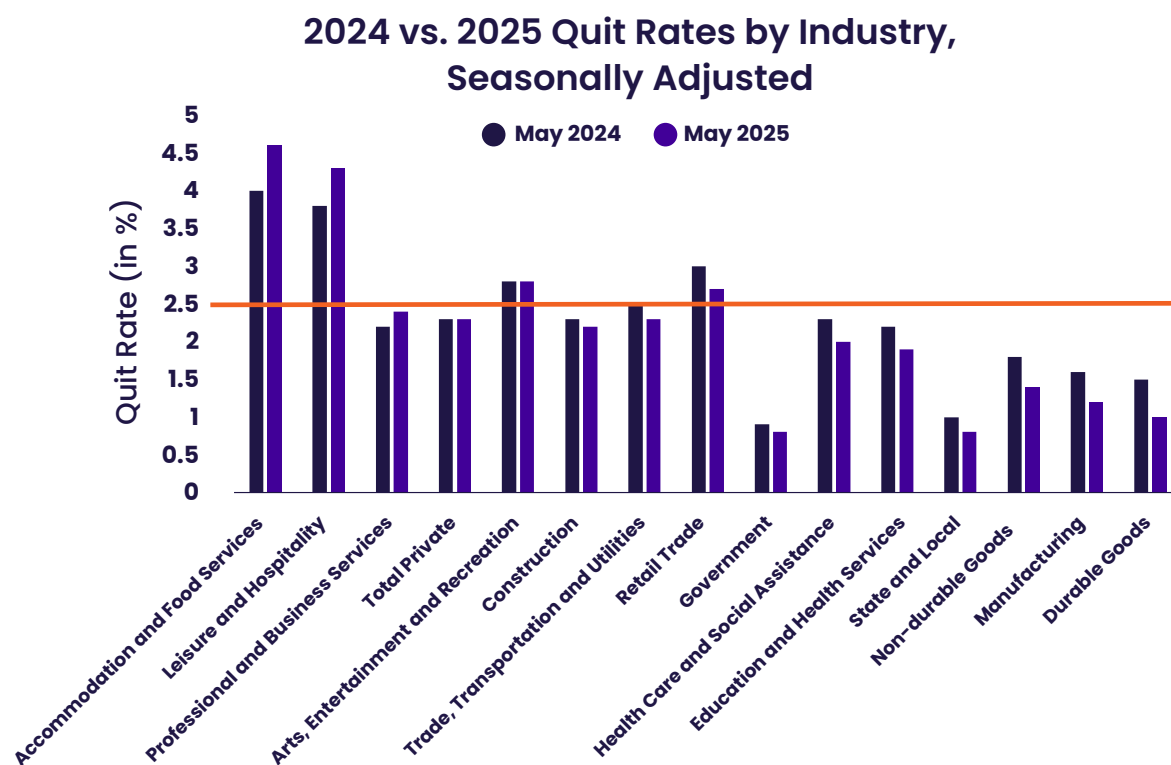
Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted



Quit Rates by Industry

During the pandemic recovery, sectors like leisure and hospitality, retail and professional services saw historically high churn as workers leveraged tight labor conditions to seek better pay or flexibility. That momentum has slowed significantly.

The latest data show year-over-year declines in quit rates across both high-wage and lower-wage sectors, suggesting that employees at all levels are less willing to risk job changes in an uncertain economy. For higher education, this means fewer adults are in transition and actively seeking retraining opportunities. To capture enrollment, institutions will need to connect their programs to career stability, advancement and resilience, reassuring learners that additional education is a safe and worthwhile investment. This trend points to future growth opportunities in serving working adults looking to upskill and advance within their current field and highlights the opportunity to serve career changers in fields with higher quit rates.



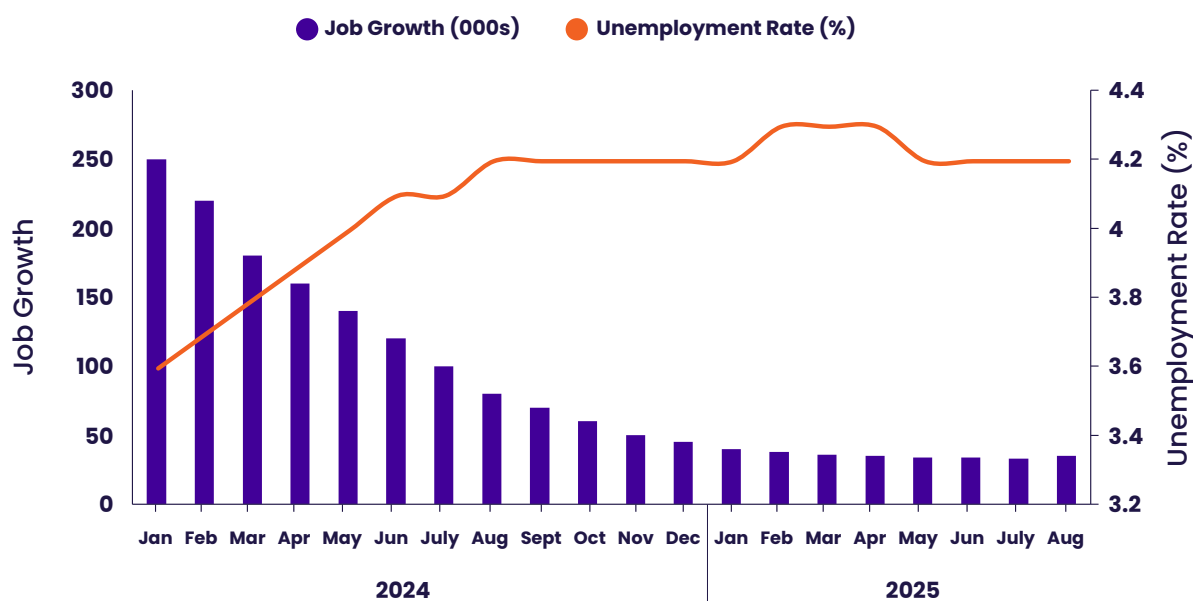
Source: U.S. Bureau of Labor Statistics, Seasonally Adjusted (organized by YoY relative growth/erosion)

Drivers of Unemployment

Unemployment trends are being shaped less by cyclical swings and more by structural dynamics in the labor market. Job creation has slowed, with monthly gains falling below the pace needed to absorb new entrants to the workforce. At the same time, productivity gains, often linked to automation and technology adoption, are enabling firms to meet demand with fewer workers. The combination of these forces has suppressed labor demand and contributed to rising unemployment rates.

Higher education must prepare graduates for a labor market where adaptability, technical fluency and transferable skills matter as much as specialized training. Institutions should align programs with emerging industries and help learners reskill quickly to best position graduates to excel in a slower job growth market.

Unemployment vs. Job Growth

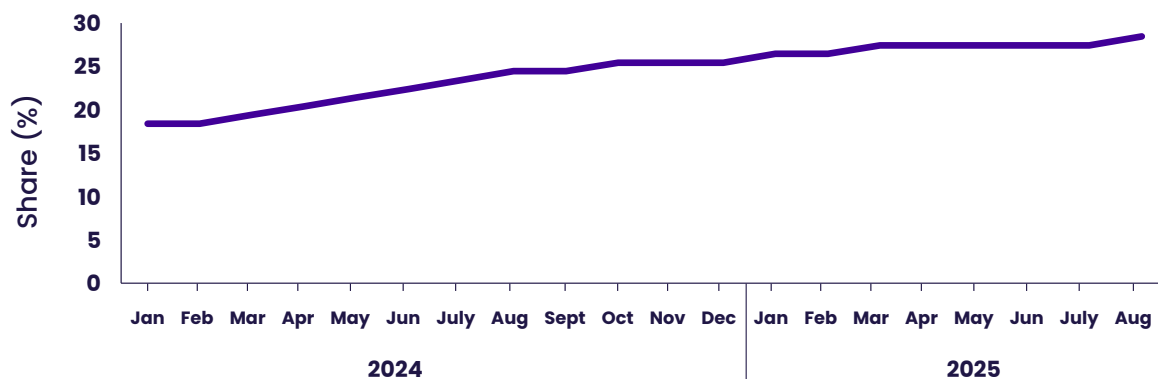


Source: U.S. Bureau of Labor Statistics – Employment Situation (monthly jobs/unemployment data)

Long-Term Unemployment

Increasingly, Americans remain unemployed for extended periods. This reflects the difficulty of re-entering the workforce after displacement. For higher education, this is both a challenge and an opportunity. Institutions that design rapid reskilling pathways, offer stackable credentials and build tight links to employers can provide an attractive re-entry strategy for sidelined workers.

Long-Term Unemployment Share (27+ weeks)



U.S. Bureau of Labor Statistics – Employment Situation, Table A-12 (long-term unemployed)



Graduate Outcomes and Underemployment

Recent Graduate Unemployment, Degree Premiums Under Pressure

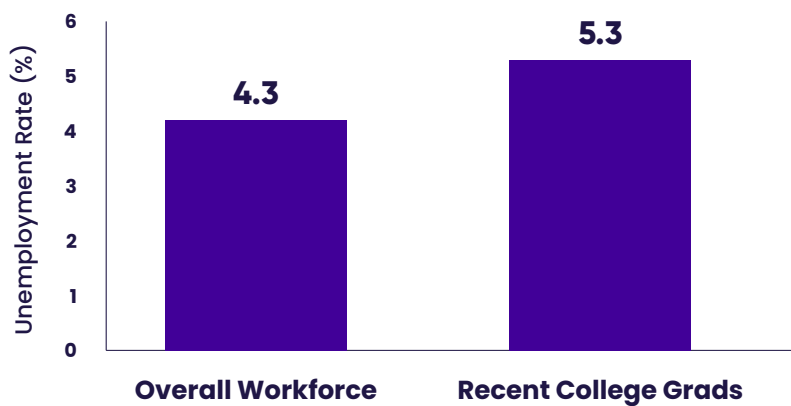
While degrees continue to confer wage premiums, recent graduates face greater challenges in securing work. New graduate unemployment hovers around five percent, above the national average, and underemployment is persistent in many fields. Students and families are increasingly looking for evidence that specific programs at specific institutions will deliver sustainable career pathways.

Unemployment remains disproportionately higher for recent college graduates compared to the overall workforce. The unemployment rate for recent graduates stands at 5.3 percent, above the 4.3 percent rate for all workers.

This gap underscores the challenges new entrants face in securing stable employment, even with a degree in hand. Employers often seek candidates with prior experience, leaving recent graduates at a disadvantage. Hiring slowdowns in entry-level roles can amplify the risk of underemployment or unemployment.

Institutions that publish transparent outcomes, highlight alumni success and connect academic work with employer demand will build better alumni relationships and set a foundation for **persistent enrollment growth**.

Recent Grads vs. Overall Workforce



Source: Federal Reserve Bank of New York – Labor Market for Recent College Graduates

For higher education, the signal is clear. Institutions must also embed career readiness, experiential learning and direct employer partnerships into academic programs to ensure graduates can bridge the transition from education to employment. Students and graduates will demand an experience that delivers more than knowledge acquired in the classroom. Modern Learners expect to attain the skills, support and direct pathways to career and economic outcomes.

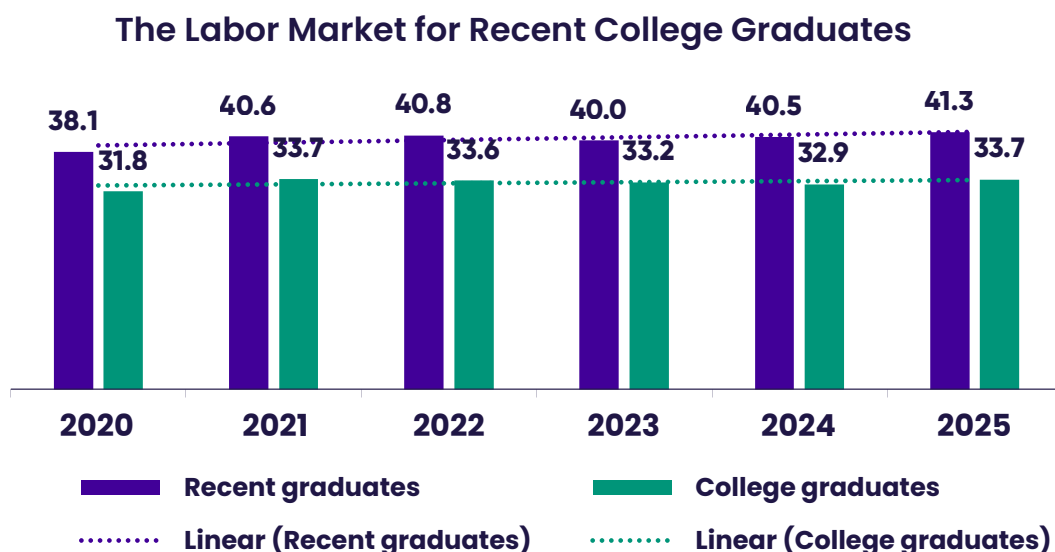
Graduate Labor Market Outcomes

Despite the recent graduate unemployment rate, the labor market for recent graduates has remained relatively strong over the past five years. The employment-to-population ratio for recent graduates has hovered between 38 and 41 percent since 2020, consistently higher than the broader group of college graduates, which has remained in the 32 to 34 percent range.

The positive employment trends are tied to highly productive growth fields such as health care, technology and professional services, which have expanded hiring pipelines despite broader economic slowdowns.

At the same time, the relatively flat trajectory of the labor market over the period points to structural challenges. While the overall labor market recovered quickly from the pandemic downturn, college graduates have not experienced significant upward momentum in participation. Growth is incremental rather than transformative.

For higher education institutions, the data highlights a dual imperative. Colleges must prepare students for immediate employability, while also helping alumni sustain and advance their careers beyond the first job. Programs that embed lifelong learning pathways, career services and alumni upskilling initiatives will be increasingly important in addressing this gap.



Sources: U.S. Census Bureau and U.S. Bureau of Labor Statistics, Current Population Survey (IPUMS); U.S. Department of Labor, O*NET

Underemployment by Major

The labor market and employment picture shifts significantly when broken down by field of study. The underemployment rate, representing graduates working in jobs that do not require a degree, varies widely by major and underscores how academic choice directly shapes career outcomes.

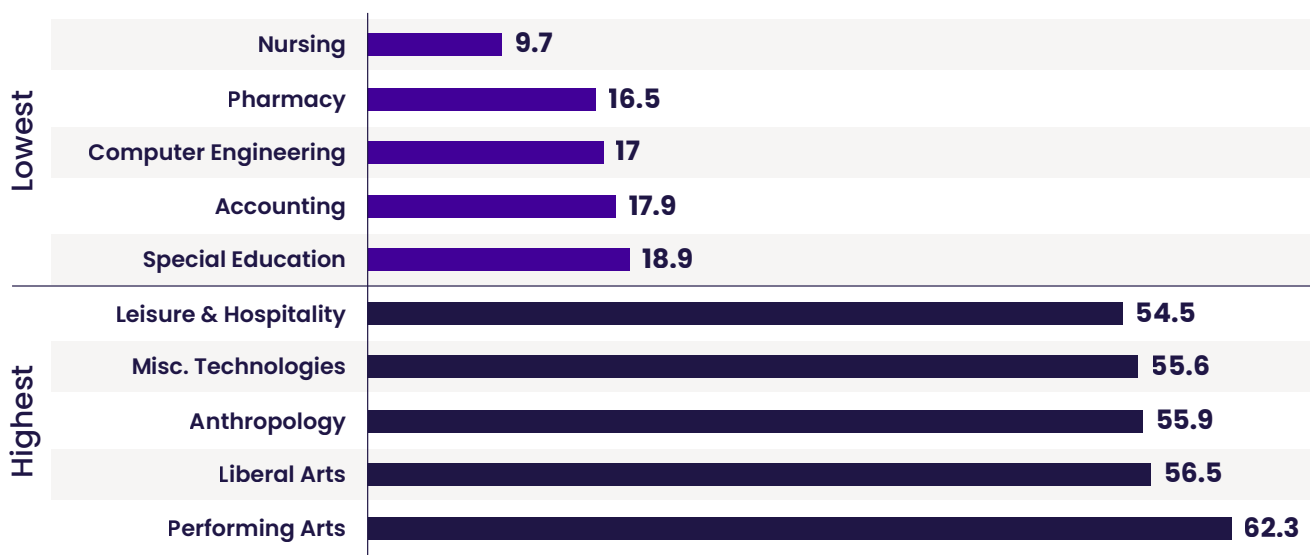
The strongest labor market alignment can be seen in majors tied to high-demand, skill-specific fields such as Nursing (9.7%), Pharmacy (16.5%) and Computer Engineering (17.0%). Graduates in these areas typically transition smoothly into professional roles with clear credentialing requirements and strong employer demand.

By contrast, the highest underemployment rates are concentrated in fields where career pathways are less direct or are oversaturated. Graduates in Performing Arts (62.3%), Liberal Arts (56.5%) and Anthropology (55.9%) face significantly higher rates of underemployment. These patterns reflect structural mismatches between degree fields and labor market demand.

For institutions, this divergence has two implications. First, it highlights the importance of career-aligned curricula that prepare students for high-demand roles. Second, it underscores the need for complementary support programs such as internships, employer partnerships and micro-credential that help students in less-defined pathways translate their degrees into marketable skills.

While program alignment with high-demand careers will result in the reduction or elimination of some programs at some institutions, there are opportunities to transform existing programs with new or emerging fields and deliver career-ready skills. Transformational leaders of traditional liberal arts programs and institutions are re-imagining the liberal arts degree to meet the needs of Modern Learners.

Underemployment Rate (%) by Major



Sources: U.S. Census Bureau, American Community Survey (IPUMS); U.S. Department of Labor, O*NET. Top 5 (highest) and Bottom 5 (lowest)



The Opportunity to Drive Accessibility

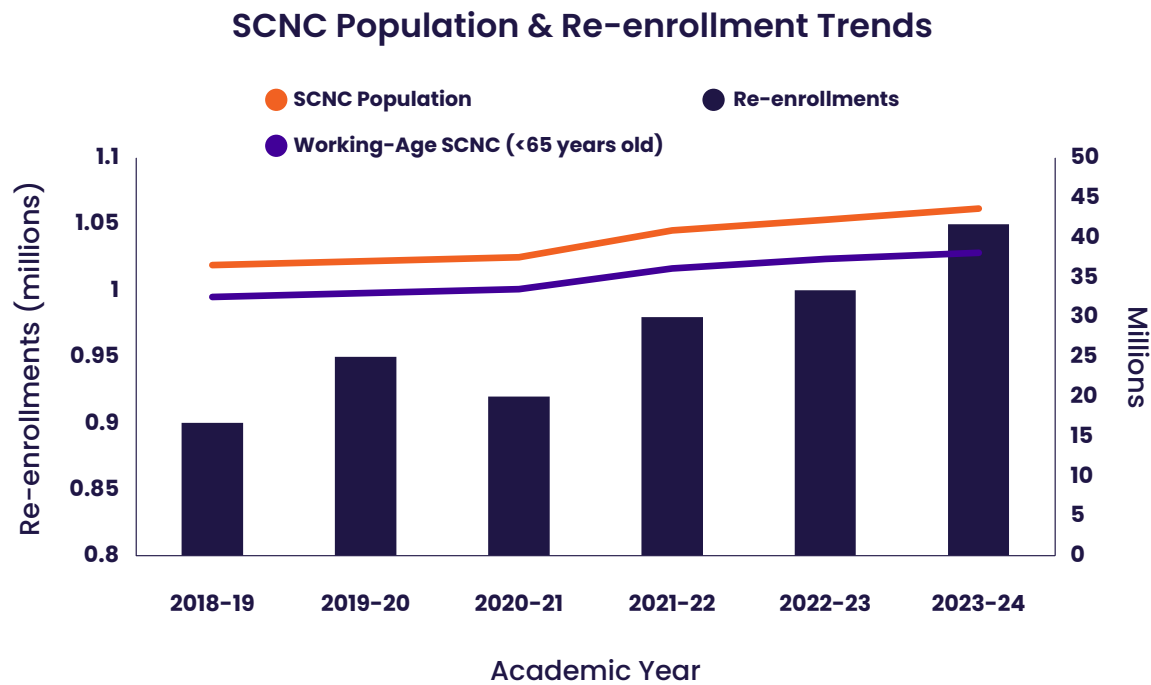
One of the most pressing opportunities facing higher education today lies in the 43.1 million Americans with “Some College, No Credential” (SCNC). These individuals, 37.6 million of whom are working-age adults, represent a vast pool of learners who have already signaled interest in postsecondary education but left before completing a credential for any number of reasons. The latest National Student Clearinghouse Research Center (2025) report shows that the SCNC population continues to grow, driven by new stop-outs that outpace re-engagement and completion.

For institutions, this is not just a statistic; it is a call to action. Adult learners are at the heart of the modern higher education marketplace. They are balancing work, family and financial obligations. They increasingly seek flexible, career-relevant and affordable learning pathways. The SCNC individual was failed by the higher education system one time. It is incumbent upon higher ed leaders to develop pathways and support services that ensure they are able to persist to completion the second time around.

With over one million re-enrollments in 2023–24 alone, momentum is beginning to shift. Leading institutions are designing programs tailored to these learners and are well positioned to capture meaningful enrollment growth.

The SCNC opportunity also underscores a larger point: higher education must move beyond clinging to what worked in the past. Traditional 18–22-year-old pipelines are shrinking, while adult learners and online modalities are becoming the growth engines of the sector. For SCNC learners, cost, career outcomes and convenience are determining factors in their enrollment and persistence. They demand accelerated completion pathways, credit recognition for prior learning, stackable credentials and online or hybrid formats that align with their lives. For colleges and universities, addressing this audience cannot be viewed as a side initiative, it is a central strategy for enrollment growth and long-term sustainability.

SCNC adults should be thought of not as “stopped out” but as “ready to re-engage.” Those institutions that align to the needs and preferences of this majority population will succeed in a competitive landscape. Failing to transform means missing the most significant enrollment opportunity of the coming decade, possibly with dire consequences.



Source: National Student Clearinghouse Research Center. (2025). *Some College, No Credential: 2025 Report for the Nation and the States*



AI Transforming Higher Education

Artificial intelligence (AI) is already reshaping higher education and redefining what's possible. Institutions that hesitate to adopt AI or treat AI as a future consideration will fail to meet the demands of Modern Learners and fall dangerously behind the competition. AI offers the tools to engage students more meaningfully, optimize operations and outpace the competition. The future isn't waiting. Now is the time for institutions to fully embrace the many implications of AI, from marketing and enrollment to student experience and career readiness.

The advance of automation and AI also continues to reshape the employment landscape, with the highest risks concentrated among workers without degrees in low-skill occupations. Higher education has the potential to buffer these disruptions by equipping graduates with technical fluency, adaptability and the ability to thrive alongside AI technologies.

Automation/AI Displacement Risk by Education Level



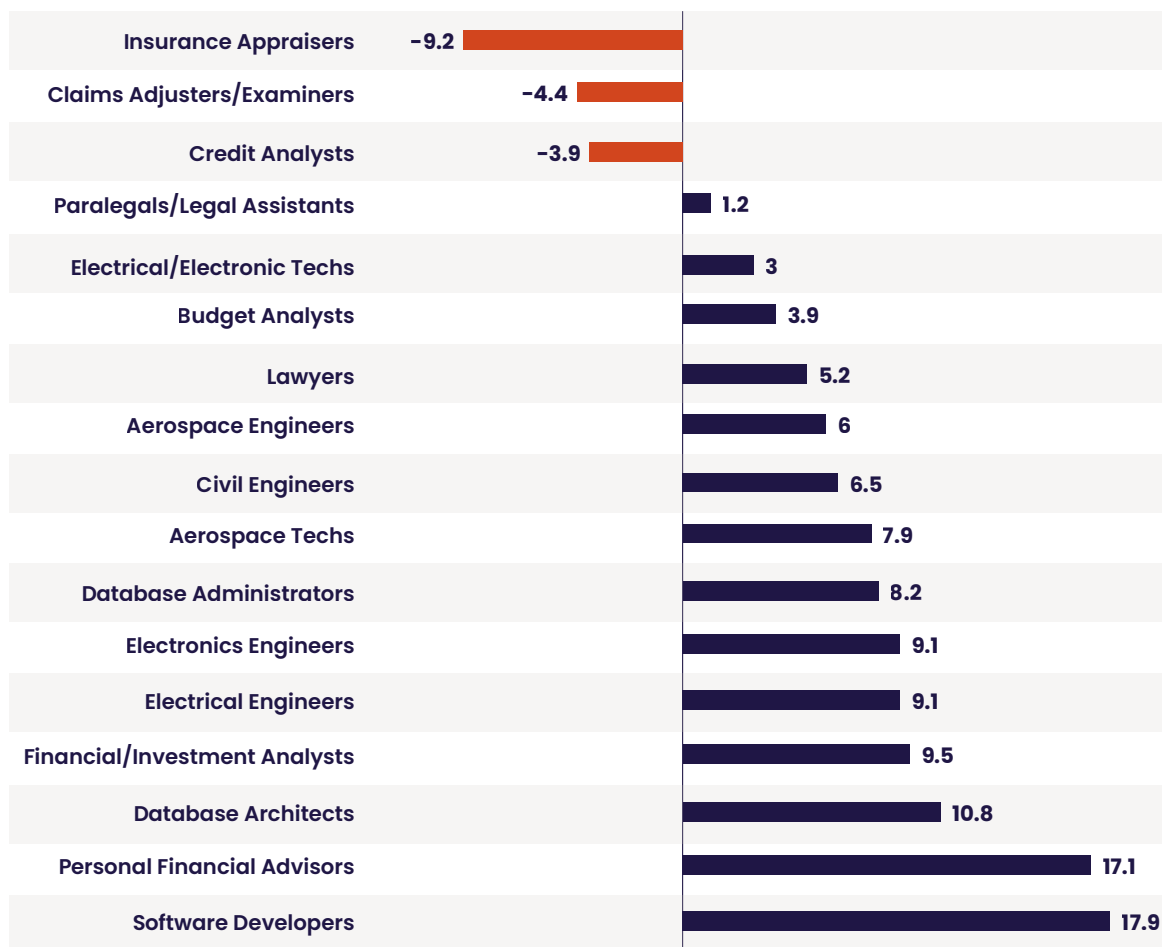
Source: OECD – Automation and the Future of Work (U.S. job risk estimates)

AI, Automation and the Value of Non-Degree Credentials

The employment shifts reflected in the long-term projections illustrate a stark divide in the age of AI. As automation and algorithmic systems take hold, occupations built on routine, rules-based decision-making such as insurance appraisers (-9.2%), claims adjusters (-4.4%) and credit analysts (-3.9%) are projected to contract meaningfully by 2033. By contrast, growth is concentrated in fields demanding advanced technical skills and human judgment such as software developers (+17.9%), personal financial advisors (+17.1%) and database architects (+10.8%).

For higher education, the implication is unambiguous: the future labor market will reward continuous skill development, not static credentials. This is where non-degree credentials become a vital strategic lever. The opportunity is not only to create entry points for displaced workers but also to design stackable credential pathways that bridge short-term training with long-term degree attainment. Institutions that align these programs with employer needs and labor market demand will not only serve today's Modern Learner; they will anchor their role as essential workforce partners in an economy where AI continually reshapes opportunity.

Projected Employment Change (2023-2033) in Occupations Exposed to AI



Source: U.S. Bureau of Labor Statistics, Employment Projections Program.
Christine Machovec, Michael J. Rieley, and Emily Rolen, "Incorporating AI impacts in BLS employment projections: occupational case studies,"
Monthly Labor Review, U.S. Bureau of Labor Statistics, February 2025.

AI Usage in College Search

The era of predictable, keyword-driven search engine marketing is over. Artificial intelligence has rewritten the rules of discovery, transforming the search engine from a simple directory into a sophisticated, conversational advisor and the primary curator of information. The days of Search Engine Optimization has transitioned into the era of Search Everywhere Optimization.

This is not a distant shift; it is the current reality. Today, an estimated 73% of all education-related queries are answered not by a list of blue links, but by AI Overviews that deliver direct, synthesized information directly on the results page. Prospective students may now get the information they seek most—program details, tuition costs and your reputation—without ever visiting your website.

The new imperative is to feed the AI algorithms the holistic signals they crave. Success is no longer found in meticulously managed keywords and siloed campaigns but in consolidated, intent-driven strategies that leverage AI-enabled tools. This is not merely an efficiency play; it is a strategic necessity to ensure the AI platforms and chatbots view your institution as a relevant and authoritative source for the answer to a student's query.

Furthermore, the search experience has expanded beyond Google's domain. Modern learners, particularly Gen Z, have adopted a "search everywhere" mentality, turning to platforms like YouTube, TikTok and Reddit as discovery engines. They search for authentic student testimonials on TikTok, deep-dive into program reviews on Reddit and consume long-form informational content on YouTube. An institution's footprint on these platforms is a critical relevance signal to AI algorithms. Your content and presence across the digital ecosystem has become an interconnected library of information for both prospective students and an entirely new audience of AI agents, algorithms and bots.



The goal is no longer just to rank in the search experience, but to become the definitive source of information on the web—discoverable in the search experience as well as the emerging discovery engines, including AI chatbot platforms like ChatGPT and Google Gemini. This means brand authority and content strategy are now inseparable from performance marketing. Institutions that fail to adapt to this new reality do not just risk lower search rankings; they risk becoming completely invisible to the next generation of learners.

To navigate this new terrain and achieve visibility, institutions must adopt a hierarchical strategy, as illustrated in the EducationDynamics AI Visibility Pyramid. At the foundation lies **Brand Amplification**—the essential, non-negotiable work of optimizing your entire digital footprint, from your website’s technical health to your presence in social search. This foundational layer feeds directly into building **Reputation**, the next tier, where earned media, PR and sentiment on third-party platforms solidify your authority in the eyes of both students and algorithms. Only by mastering these two interconnected layers can institutions reach the apex of the pyramid: sustainable **Revenue** growth. This is not a menu of options; it is a strategic blueprint. Attempting to drive revenue without a solid foundation of amplification and reputation is futile in an AI-driven world; it is the marketing equivalent of building a skyscraper on sand.

Brand Discoverability in the Age of AI

A strategic blueprint for AI
visibility & student engagement
in the modern marketing era



Source: EducationDynamics 2025

Together, these layers create an adaptive ecosystem designed for AI-era enrollment marketing. By integrating these capabilities, we help our partners:

- / Reduce dependence on any one channel and build resilience against market shifts.
- / Translate fragmented digital activity into a unified presence optimized for both humans and AI.
- / Reinforce brand trust and visibility where students make decisions today—and where AI will guide them tomorrow.



Enrollment Trends

The following analysis draws on the Current-Term Enrollment Estimates report released in May 2025 by the National Student Clearinghouse Research Center, the most recent national dataset available. Through Fall 2024, enrollment continued to rebound from the pandemic years. Yet this recovery is fragile and uneven across sectors, demographics and programs. More importantly, the rebound masks deeper shifts in student demand preferences, looming demographic change and rapid changes in policy and technology that are reshaping how students search, engage and decide. The challenge for higher education leaders is to cut through mixed signals and fragmented data to design growth pathways aligned with the Modern Learner.

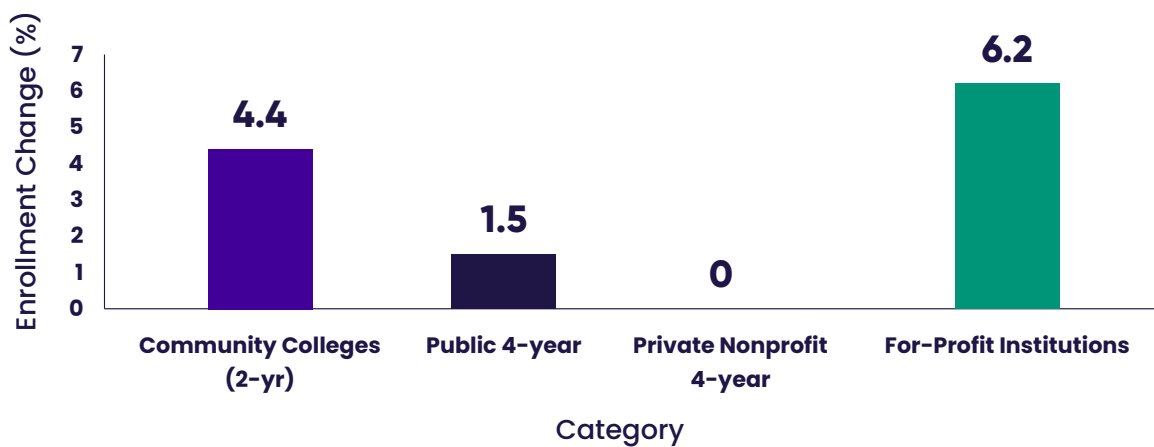
The Shifting Enrollment Foundation

After years of decline, total enrollment grew in 2024, though growth patterns are uneven. Community colleges rebounded strongly, dual enrollment surged and adult learners returned - with a strong preference for flexible and convenient learning modalities.

Program enrollment also shows trends consistent with student demands for programs that deliver career outcomes. Enrollment in humanities programs continues to contract, while enrollment grew in STEM and healthcare programs.

For most institutions, this enrollment growth is anticipated to be a brief bump rather than a sustained recovery, particularly those institutions focused on the status quo channels of traditional student search and on-campus enrollment. Forward looking institutions are already building for the future; actively cultivating dual enrollment pipelines, strengthening adult learner pathways and investing in applied programs that align with labor market demand.

Enrollment Change by Sector (2023-2024)

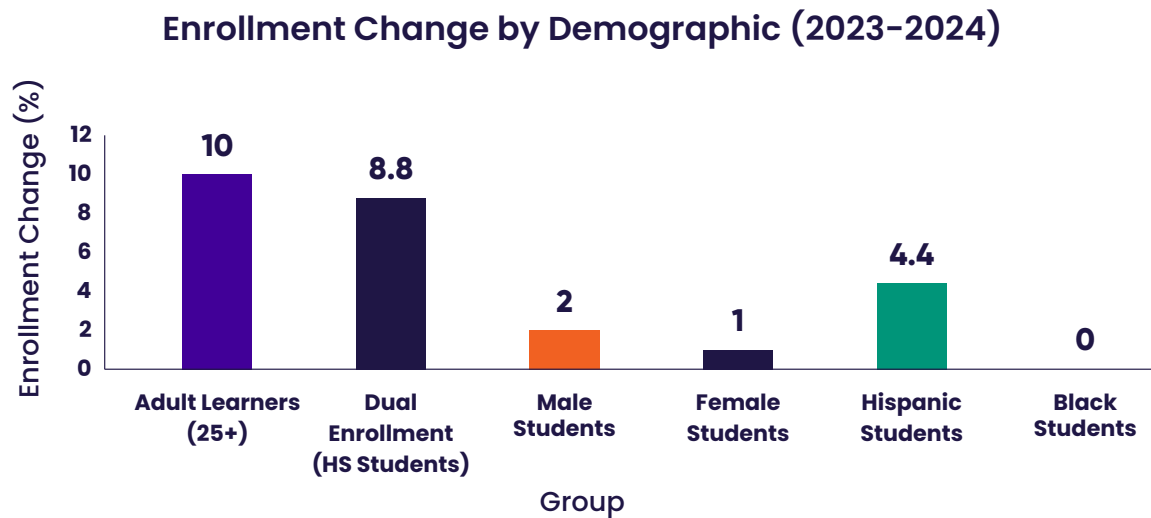


Source: National Student Clearinghouse Research Center, Current-Term Enrollment Estimates, May 22, 2025 Fall 2023, Fall 2024



Enrollment by Demographics

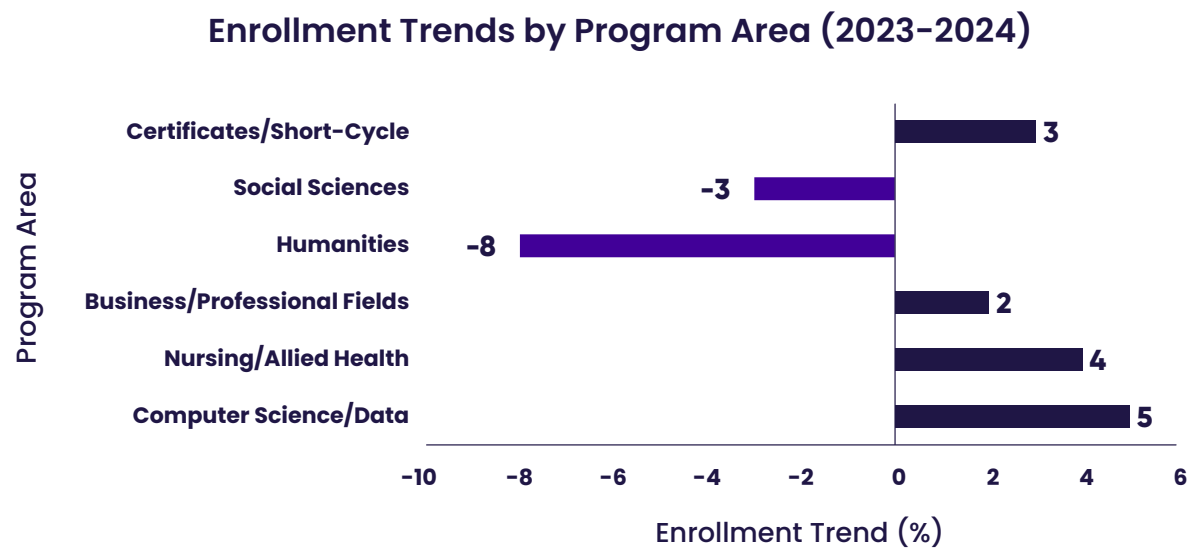
Growth is strongest among Hispanic, dual enrollment and adult learners.



Source: National Student Clearinghouse Research Center, Current Term Enrollment Estimates (2024–2025); American Council on Education, Race and Ethnicity in Higher Education (2024)

Program Area Trends

STEM and health-related programs show strong growth, while Humanities and Social Sciences program enrollment continue to contract. Across all study areas, more students are choosing certificate and alternative credential programs, which are more likely to align closely with short-term and immediate employment opportunities.

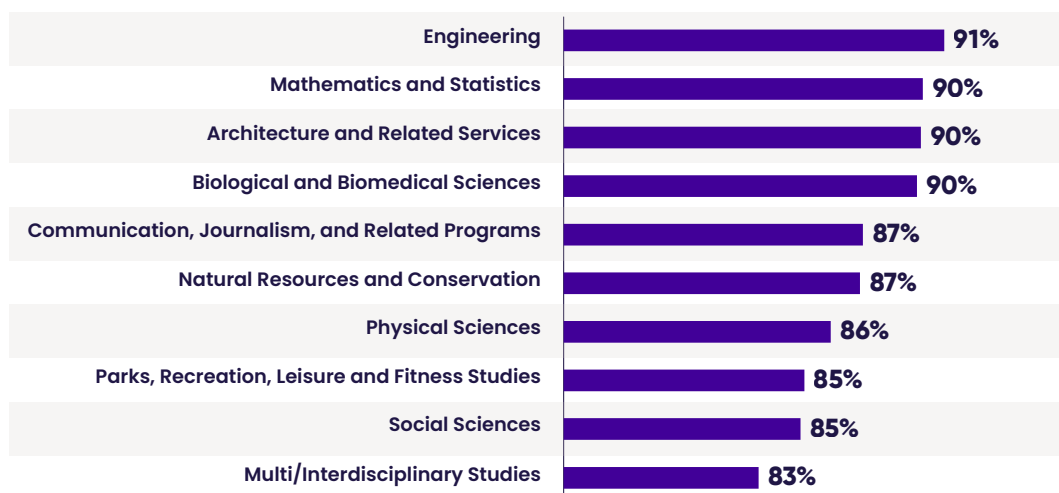


Source: U.S. Department of Education, National Center for Education Statistics (NCES), Integrated Postsecondary Education Data System (IPEDS), Completions Survey (2019–2023); National Student Clearinghouse Research Center, Undergraduate Enrollment by Program Area (2024)

Field and Age Patterns

Engineering, mathematics and architecture sustain high persistence rates, due to strong program structures and clear career outcomes. By contrast, philosophy, religious studies and basic skills programs are experiencing steep erosion, suggesting the lack of clear ROI for these programs is influencing students' decisions about whether to persist. Adult learners continue to show greater attrition risk due to competing responsibilities, which demand stronger advising and flexible support from institutions. Institutions that fail to reinforce persistence are at risk for both enrollment losses and reputational harm in the eyes of prospective students.

2023 Top 10 Fields by Persistence



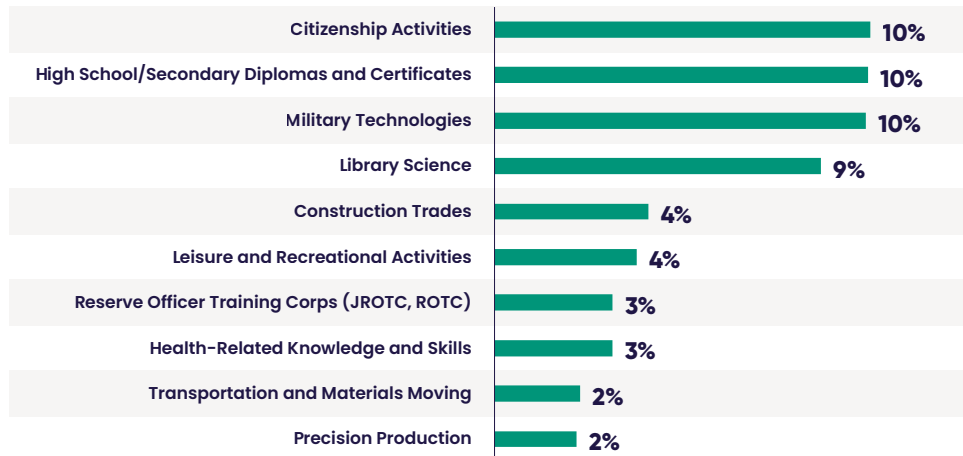
Source: NSCRC Persistence/Retention Reports; IPEDS Completions Survey; ACS (IPUMS)

2023 Bottom 10 Fields by Persistence



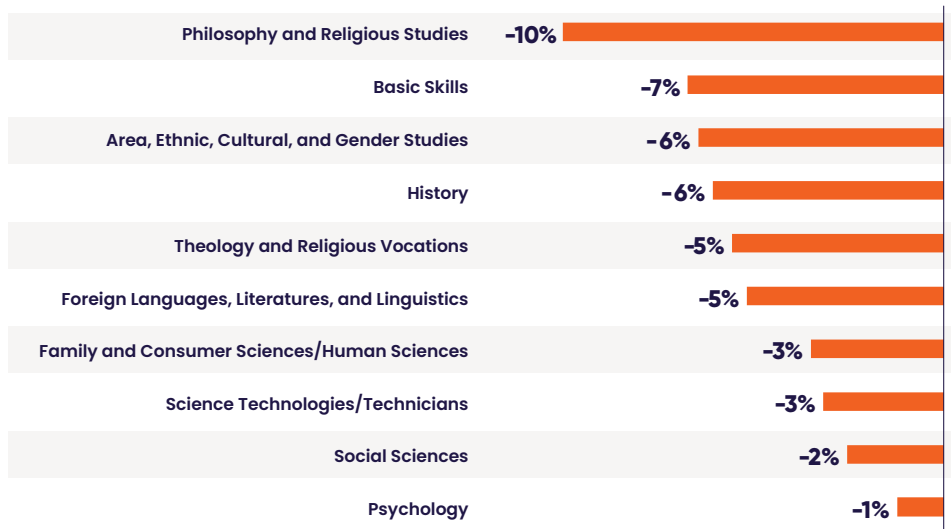
Source: NSCRC Persistence/Retention Reports; IPEDS Completions Survey; ACS (IPUMS)

'18-'23 Most Improved Fields by Persistence



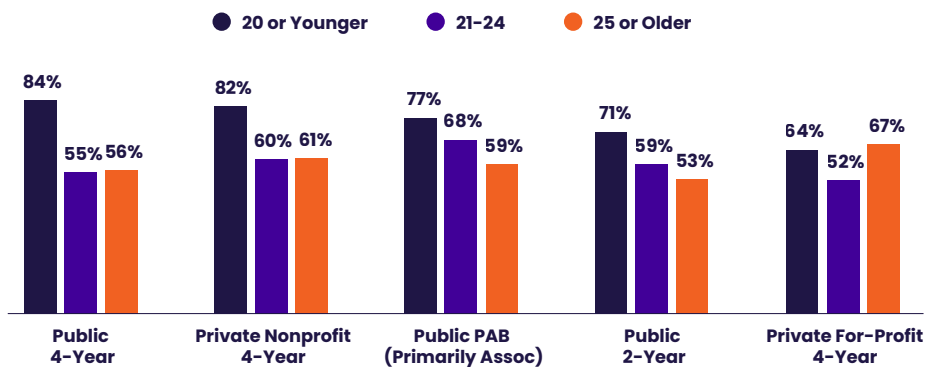
Source: NSCRC Persistence/Retention Reports; IPEDS Completions Survey; ACS (IPUMS)

'18-'23 Most Eroded Fields by Persistence



Source: NSCRC Persistence/Retention Reports; IPEDS Completions Survey; ACS (IPUMS)

2023 First Term Spring Persistence by Sector and Age Group

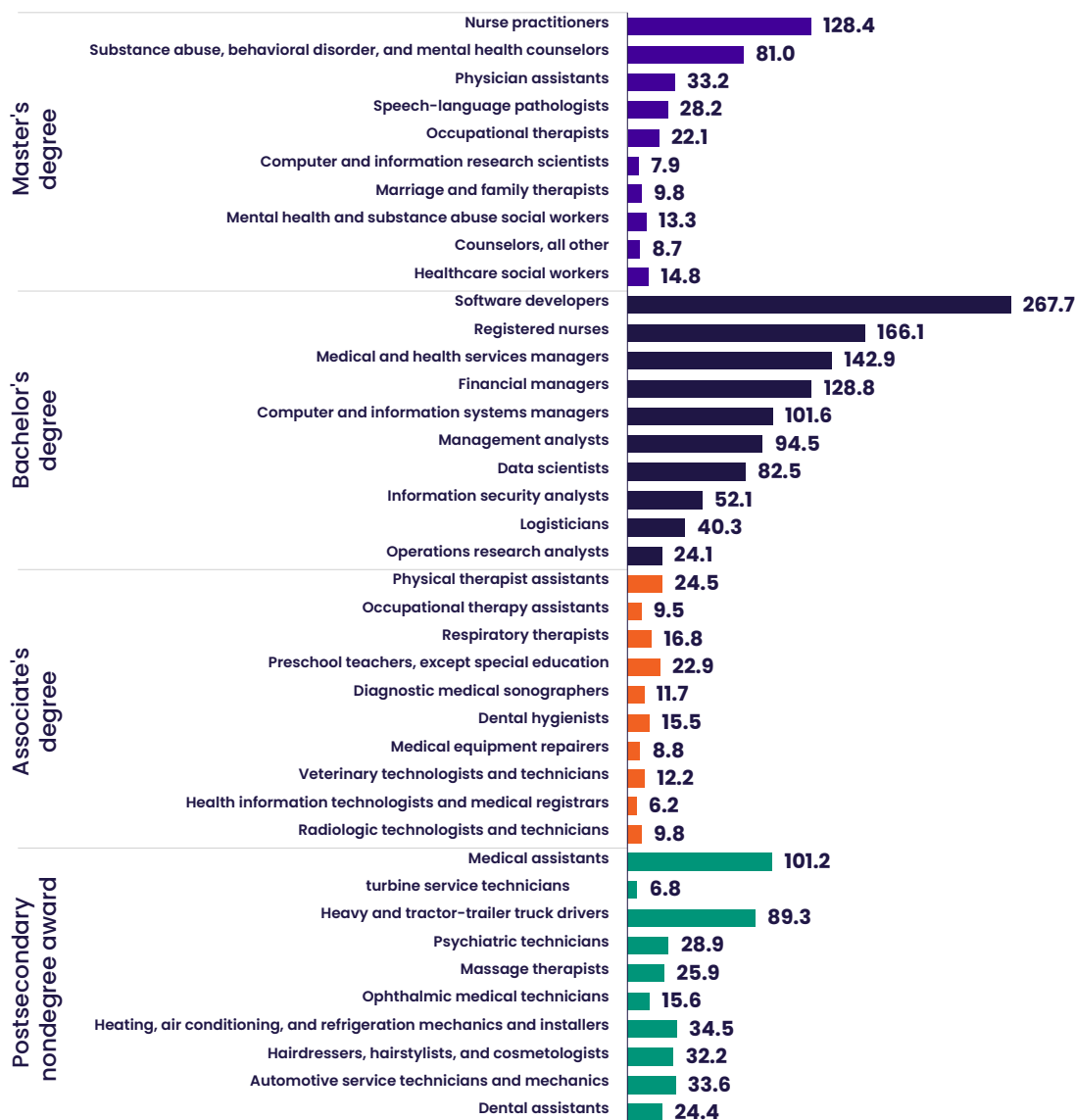


Sources: NSCRC Persistence/Retention Reports; IPEDS Completions Survey; ACS (IPUMS)

Long-Term Projections and Higher Education's Strategic Role

Total employment is projected to grow by 5.2 million from 2024 to 2034. During this period, job growth is projected to be steady but uneven. Growth will be concentrated in health care, technology and business services. Demographic forecasts point to a flattening of the traditional college-age population, shifting the balance toward adult learners and lifelong education.

**Top Ten 2024–2034 Occupations by Degree Level
(Employment Change in Thousands)**



Source: BLS Occupational Projections 2024–2034 based on indexed growth and % growth, Top 10 per Typical education needed for entry

Long-term projections highlight the need for higher education to expand flexible credentialing pathways that connect short-term certificates with degree programs. Institutions that build this bridge will capture both immediate demand and lifelong learners as adults seek to reskill and expand their earning potential amidst a changing job market.

School Closures

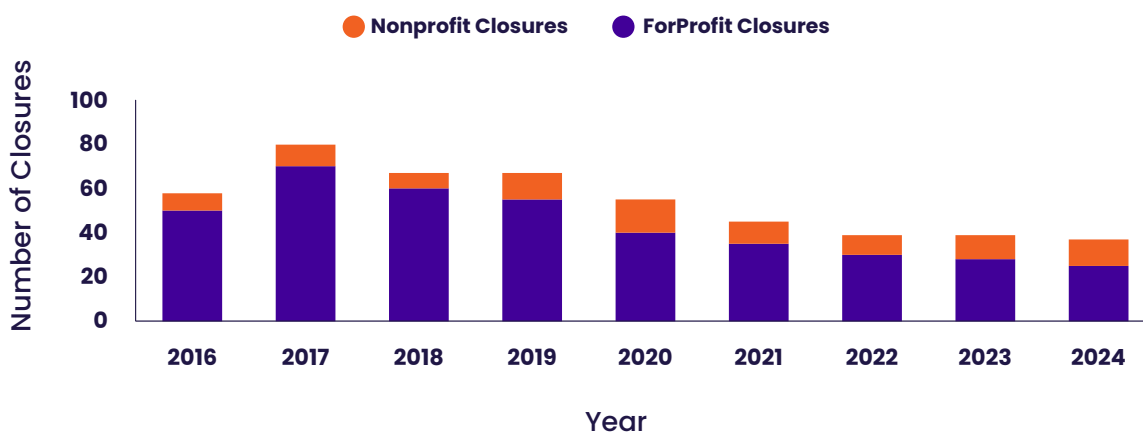
A sobering but unavoidable reality in today's higher education landscape is the accelerating pace of institutional closures and consolidations. Since 2016, more than 90 nonprofit colleges and over 450 for-profit institutions have closed their doors. The trend has intensified in the wake of demographic shifts, financial fragility and heightened public skepticism about value. The U.S. Department of Education has flagged more than 400 institutions as being on its “heightened cash monitoring” list, underscoring the precarious financial footing of many campuses. Closures and mergers will continue and are likely to accelerate in the coming years.

Closures are no longer confined to small rural colleges. Regional privates, tuition-dependent institutions and even some public campuses are increasingly at risk. In addition to the much discussed and long anticipated enrollment cliff due to birth rate declines eighteen years ago, there are serious financial pressures on institutions. Unsustainable discount rates, mounting infrastructure costs and high employee expenses outpace revenue growth, particularly for tuition-dependent institutions with few avenues for alternative funding.

For learners, closures create disruptive “education deserts,” with displaced students often struggling to transfer credits or complete programs in a timely way. Many simply walk away from higher education. Closures also take a toll on local communities, eroding local economies, reducing cultural capital and weakening workforce pipelines.

This dynamic reinforces the urgency of institutional transformation. Colleges cannot assume survival by tradition or reputation alone. Leaders must proactively address financial health, diversify enrollment streams and form strategic partnerships to remain viable. For institutions on the margin, mergers, shared services and cross-institutional collaborations may provide a path forward. For the sector, closures should serve as a wake-up call: the business model of higher education is shifting and those who delay adaptation will become tomorrow's cautionary headline.

U.S. Higher Education Institutional Closures (2016–2024)



Source: U.S. Department of Education, National Center for Education Statistics (NCES). (2024). *Digest of Education Statistics*, Table 317.50: Number and percentage distribution of Title IV institutions that closed, by control of institution

Shifting Perceptions of College Value

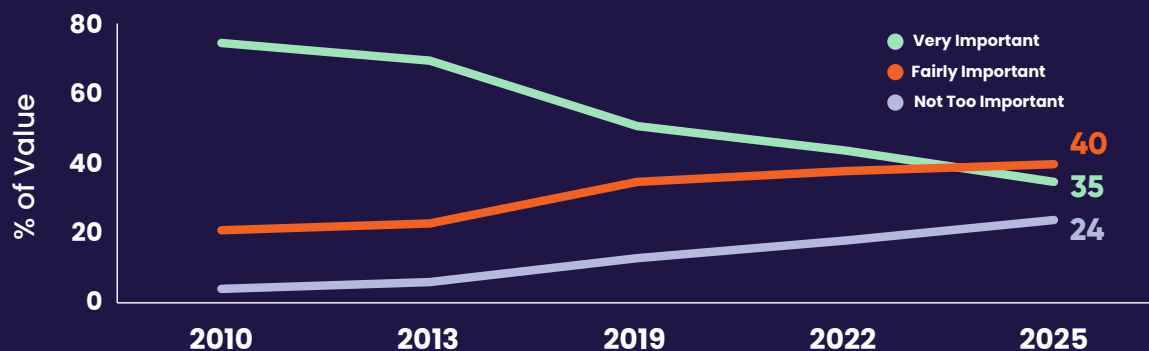
Data from Gallup's 2025 trend report underscores a significant cultural shift in how Americans view the role of higher education. In 2010, three quarters of U.S. adults considered college to be “very important” to success. Today, that figure has dropped to just 35%. At the same time, the share who believe college is “not too important” has risen nearly fivefold, from 4% to 24%.

This shift reflects a broader recalibration of the perceived value of a degree amid rising tuition costs, student debt concerns and growing awareness of alternative pathways such as certificates, bootcamps, apprenticeships and employer-provided training. Importantly, the proportion who view college as “fairly important” has grown steadily, reaching 40% in 2025. This suggests that while higher education is not being dismissed outright, Americans increasingly view it as one of several options for achieving career success rather than the singular or default pathway.

For colleges and universities, this presents both a challenge and an opportunity. Institutions must demonstrate clear return on investment by connecting degree programs directly to labor market outcomes and emphasizing affordability and flexibility. At the same time, there is a growing need to diversify offerings, particularly in the non-degree credential space where learners seek faster, lower cost and more career aligned pathways.

In the context of today's AI-enabled and rapidly shifting labor market, the declining perception of college as “very important” signals a call to action. Higher education must reinvent its value proposition, not only by defending the relevance of degrees but by positioning itself as the hub of lifelong learning that adapts with and prepares students for the future of work.

Value Americans Place on College Education



Source: Gallup, Value Americans Place on College Education, 2025.
2010 result includes 1% who volunteered "not at all important"

Summary and Strategic Recommendations

The U.S. labor market is shifting, with automation, technology, demographic change and affordability shaping how students value higher education. While enrollment has stabilized, it is increasingly powered by dual enrollment, adult learners and international diversification. At the same time, families demand evidence of ROI and students expect programs tied directly to careers.

For institutions, the imperative is clear. Colleges and universities that invest in building and amplifying a strong brand through student outcomes, equity and career alignment will sustain growth. Those that neglect it risk enrollment decline, weakened public perception and financial fragility. The business of higher education remains a relatively simple one – helping prospects join and succeed in the economic and social mainstream.

Ten imperatives emerge from this analysis. Institutions that act decisively will sustain growth, rebuild trust and lead the market:

	Imperative	Action
01	Prove Outcomes, Protect Reputation	Publish transparent results and illustrate career alignment to help students understand program value.
02	Market ROI Relentlessly	Lead with affordability and clearly communicate a projected and proven return on investment.
03	Capture the Dual Enrollment Surge	Build structured high school-to-degree pipelines
04	Own the Adult Learner Market	Offer flexible, online and stackable options with the support working learners need to balance their multiple priorities.
05	Prioritize Accessibility Through the Three C's	Deliver education that meets learners on cost, convenience and career outcomes.

Imperative		Action
06	Lead in Responsible AI Adoption	Optimize marketing for AI discoverability and AI powered platforms, while Integrating AI into advising, engagement and instruction.
07	Reinvent Vulnerable Disciplines	Reframe liberal arts around adaptability and skills attainment.
08	Re-Engage the Stopped-Out Majority	Convert the 43 million with some college, no credential into completers through credit recovery, tailored pathways and adult-first design.
09	Stack Credentials into Careers	Link short-term certificates to degree pathways.
10	Advocate for Policy Stability	Simplify aid communication and push for predictable funding.

The U.S. labor market is shifting under the weight of automation, demographic change and affordability concerns. Higher education remains the strongest path to opportunity, but students will only invest in it if institutions can prove value and outcomes. Those that lead with reputation, equity and career alignment will capture the Modern Learner—and define the next era of higher education.



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