



# 2022 Online Student Recruitment Report

10 Challenges and Solutions for  
Engaging Prospective Online Students

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## MAKING THE CASE FOR ONLINE

Since reaching a peak of 14.8 million in 2014, undergraduate fall enrollment has contracted each year, dropping to 14 million in 2020 according to the U.S. Department of Education (IPEDS). The pandemic compounded this challenge by tripling the previous year-over-year decline, with 367,056 fewer undergraduate students beginning their studies. This reality has forced institutions to have tough conversations about how to maintain growth. Digging deeper in a shrinking pool (because fewer children were born in the first decade of this century) or considering new student markets were just two of many choices.

In this same period, graduate enrollment has seen continuous growth, rising from 2.7 million in 2012<sup>1</sup> to 3.1 in 2020 (a year that, despite the pandemic, saw an additional 97,457 graduate students enroll—the approximate seating capacity of the Los Angeles Memorial Coliseum). A number of institutions have turned to graduate programs as at least one of their new markets. Some have increased their array of graduate offerings while others have put additional resources into increasing enrollment in existing programs. Many have done both.

But the graduate market is only about one-fifth the size of the undergraduate market (3.14 million versus 14 million). Even with significant growth, an increased focus on graduate enrollment may only be able to maintain overall enrollment levels as traditional undergraduate student populations recede.

That means online enrollment at both the undergraduate and graduate levels **must** become an essential ingredient to enrollment growth. As this report will show, the significant contraction of face-to-face (FACE-TO-FACE) enrollment, the inadequacy of only relying on hybrid or blended programming, and the dramatic growth in fully online enrollment has made online programs critical to institutional sustainability.

This report is organized around 10 challenges (and associated solutions) based on data from a survey of 1,609 survey respondents, each of whom was screened to ensure that they had firm plans to enroll in a fully online program in the next year (online course takers in otherwise hybrid or classroom programs were not eligible). They also had to be planning to enroll in a credit-bearing program, ranging from an undergraduate certificate to a professional doctorate.

Data are organized in most cases in one of two ways—by credential level (undergraduate degree, graduate degree, or non-degree credential) or age (five-year brackets). Throughout 2022, RNL will release additional reports on each degree level specifically, for non-degree only (with more specificity by each type of non-degree credential), for those from underrepresented backgrounds, and by age (particularly one documenting the preferences of online students under the age of 25 who comprise 24 percent of our sample).



# 1,609 respondents

All planned to enroll in fully online, credit-bearing programs.

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<sup>1</sup>The first year for which institutions reported FACE-TO-FACE and online enrollment data.

# 10 CHALLENGES AND SOLUTIONS FOR ONLINE ENROLLMENT

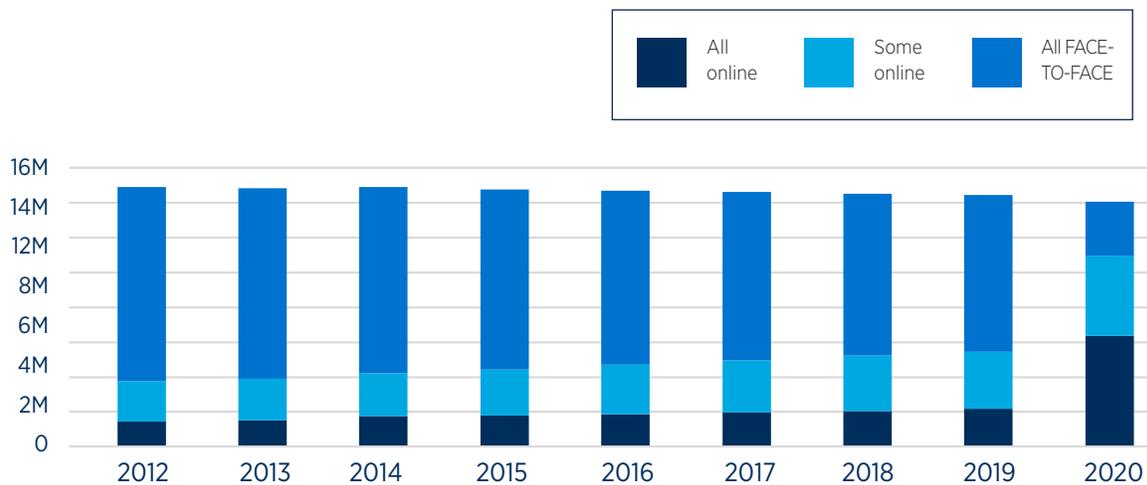
## 1 Online enrollment has become an essential ingredient for enrollment health.

Not every institution is eager to get into the online education market. Some institutions include stakeholders who are dead set against it. But outside of an increasingly thin layer of Ivy League, other prestigious privates, and some competitive public institutions that will have robust enrollment demand in the near future, more and more institutions will have to quickly find a way to make online work for themselves. Consider the following:

**Undergraduate:** While overall 2020 undergraduate enrollment included 826,000 fewer students than in 2012 (the first year for which institutions reported FACE-TO-FACE vs. distance enrollment), and with annual contraction each year since 2014, enrollment in fully online study<sup>2</sup> and those enrolled in partially online study<sup>3</sup> has increased each year. Setting aside the anomaly that is 2020, between 2012 and 2019:

- 743,162 additional students enrolled in fully online study.
- 972,136 additional students enrolled in partially online study.
- 2.1 million fewer students enrolled in fully classroom study.

**TABLE 1: UNDERGRADUATE FALL ENROLLMENT BY FORMAT**



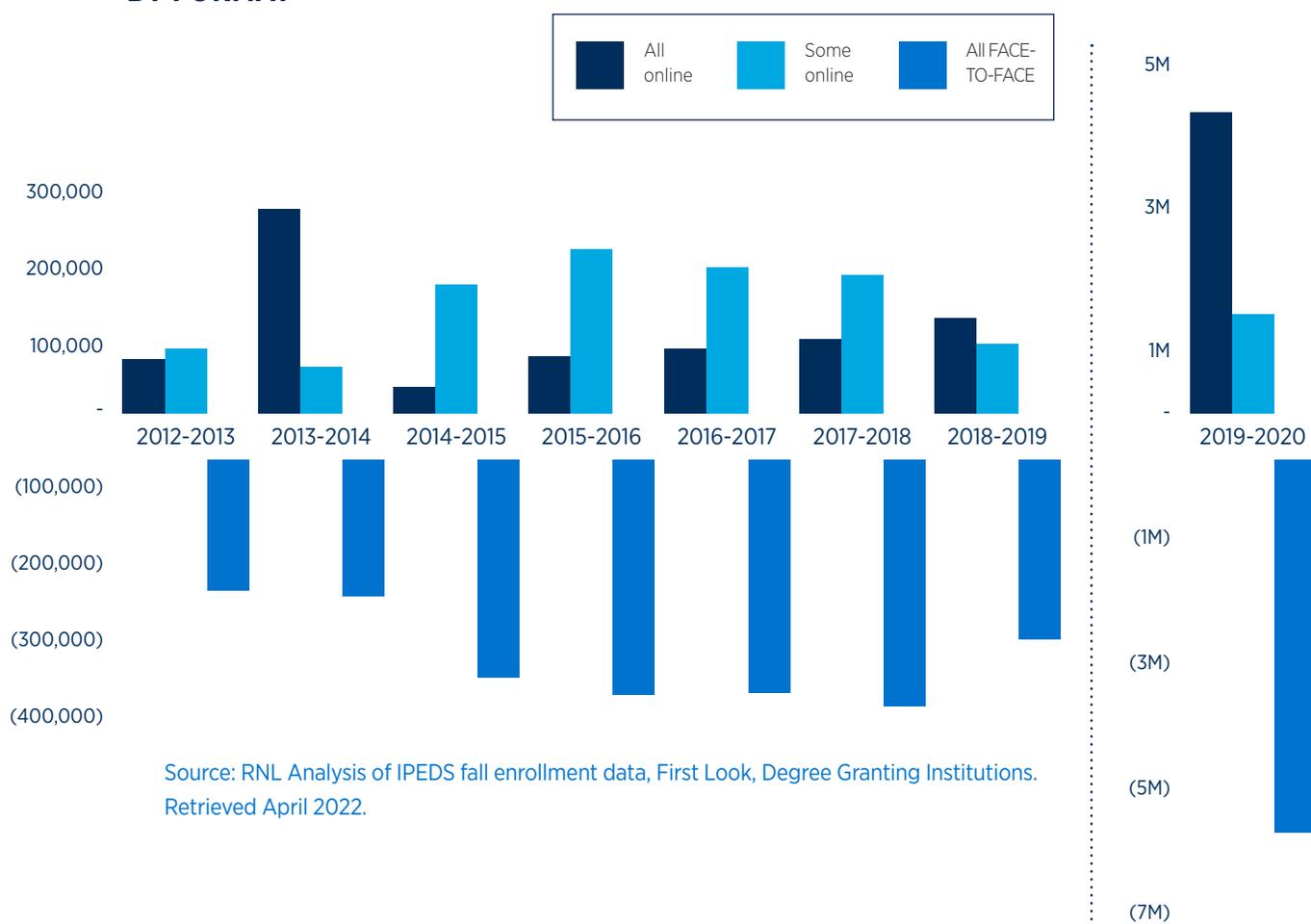
Source: RNL Analysis of IPEDS fall enrollment data, First Look, Degree Granting Institutions. Retrieved April 2022.

<sup>2</sup> "All distance courses" in IPEDS terminology.

<sup>3</sup> "One or more distance courses" in IPEDS terminology. We refer to this as "partially online." This component captures some but not all of the segment of students who are enrolled in "hybrid/blended" programs. Programs in which coursework is primarily delivered online, but total time in classroom is reduced by online institution continue to be classified as classroom courses by NCES.

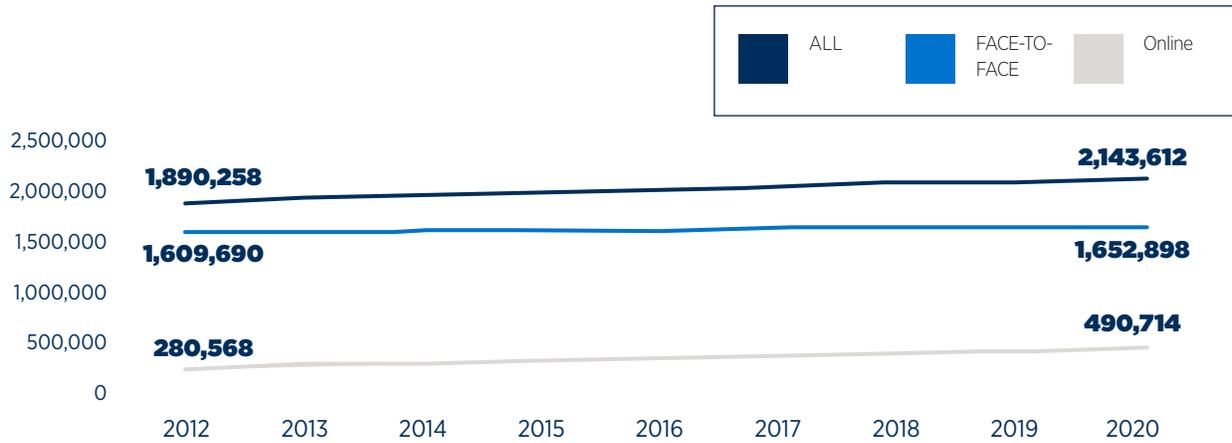
Table 2 shows even more clearly that since 2012, *all* year-over-year growth at the undergraduate level has been derived from growth among fully online and partially online students. At the same time, there has been dramatic annual contraction in students enrolled in FACE-TO-FACE study. Through 2014, the gains in online and partially online students were able to mitigate FACE-TO-FACE losses (and result in overall year-over-year enrollment growth.) Since that time, online/partially online growth has not quite been able to offset the dramatic loss of interest in FACE-TO-FACE programs among those who are enrolling in undergraduate education. The unanswered question is where the proportions by format will return after two years of dramatically expanded exposure to online and partially online instruction forced by the pandemic.

**TABLE 2: UNDERGRADUATE YEAR-OVER-YEAR FALL ENROLLMENT CHANGE BY FORMAT**



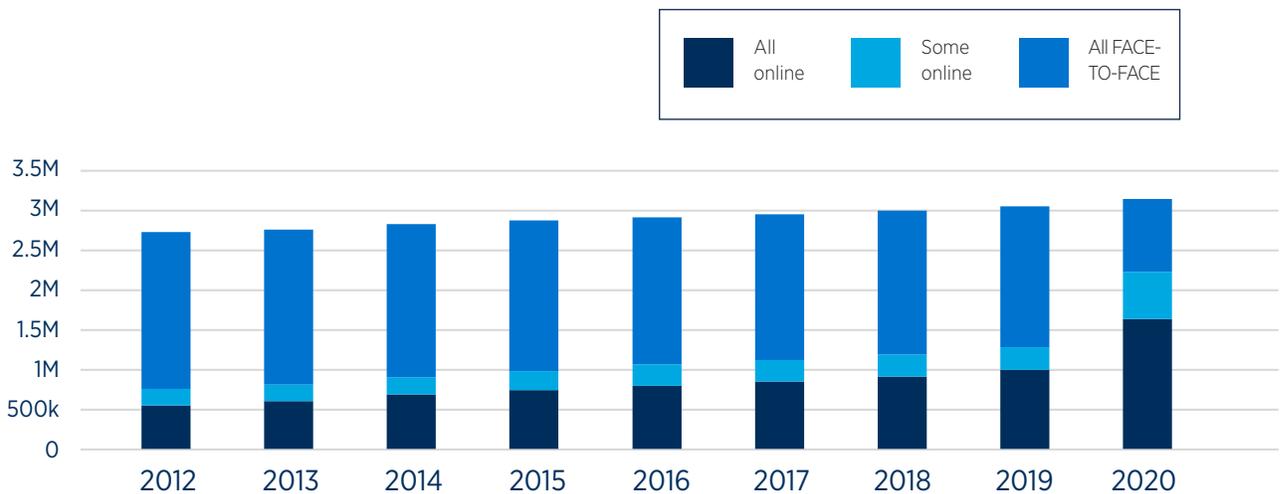
Bachelor's degree production data tell a similar story—and are largely free of the influence of the pandemic. While total degree production rose 13 percent between 2012 and 2020, FACE-TO-FACE degree production has grown by 3 percent compared to a 75 percent increase for online degree production.

**TABLE 3: NATIONAL BACHELOR'S DEGREE PRODUCTION BY FORMAT**



**Graduate:** Graduate enrollment in the U.S. has grown each year between 2012 and 2020, with 414,644 additional enrolled graduate students in 2020 compared with 2012. But year-over-year growth has been entirely driven by growth in students who enroll in either fully online study or partially online study. Setting aside the anomaly of 2020, between 2012 and 2019 an additional 441,770 students enrolled in fully online graduate study, an additional 84,003 students enrolled in partially online study, and 208,586 fewer students enrolled in fully FACE-TO-FACE study. Fully online enrollment has grown from 20 percent of the total in 2012 to 32 percent in 2019 (and 52 percent in 2020).

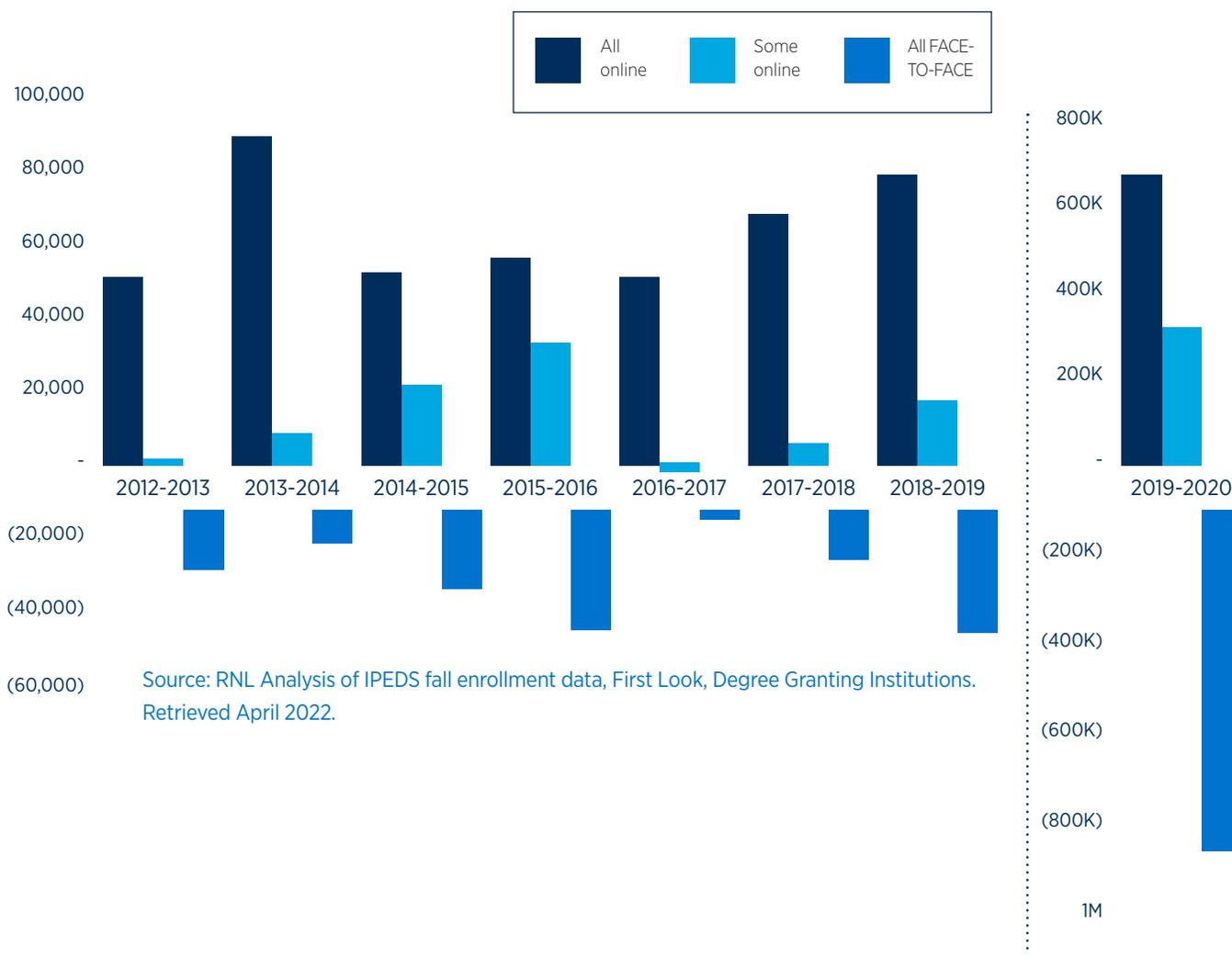
**TABLE 4: GRADUATE FALL ENROLLMENT BY FORMAT**



Source: RNL Analysis of IPEDS fall enrollment data, First Look, Degree Granting Institutions. Retrieved April 2022.

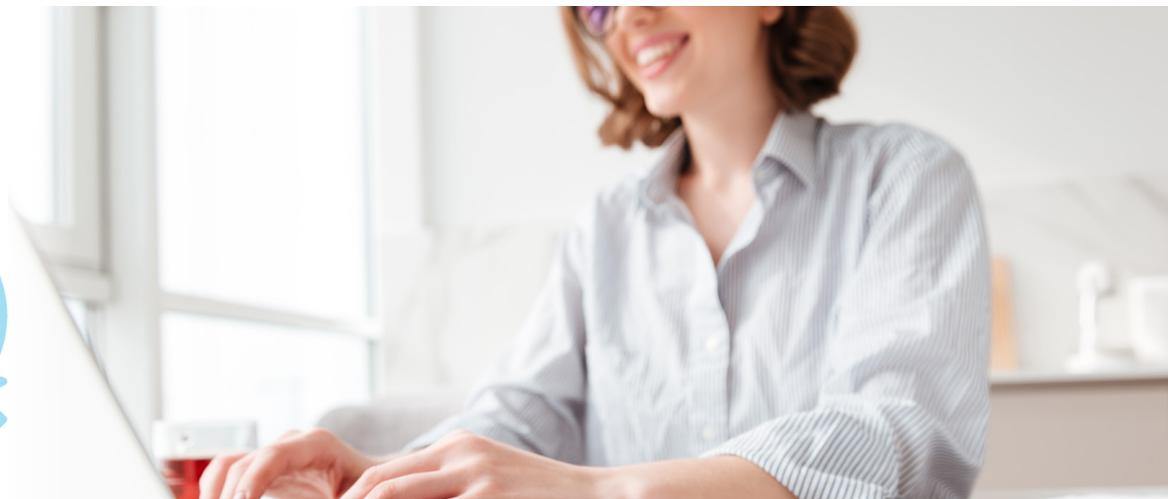
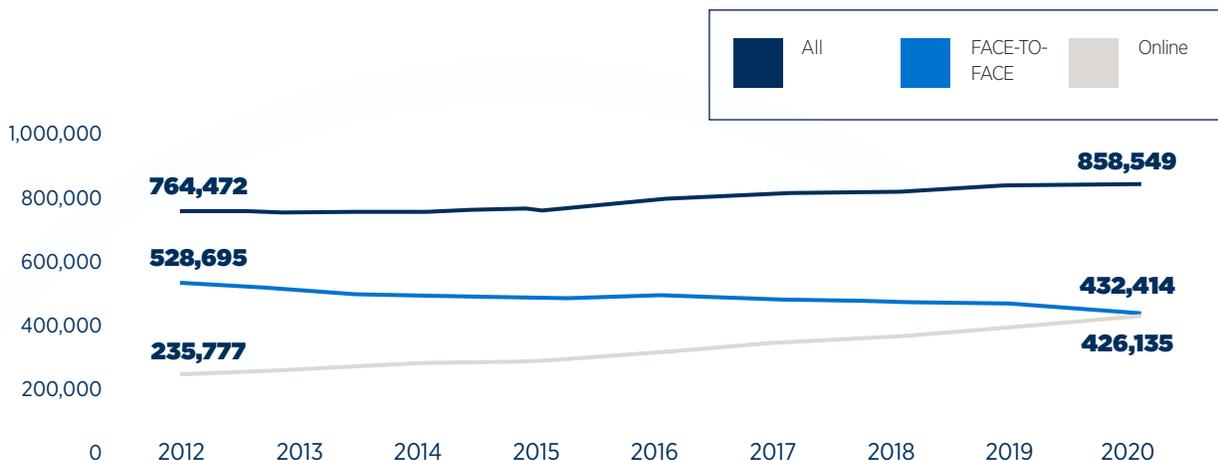
In Table 5, we see even more clearly that since 2012, all year-over-year growth in graduate student enrollment has been derived from students who enroll in fully online and partially online study. Concurrently, each year has seen dramatic contraction among FACE-TO-FACE students. This significant growth has more than counterbalanced FACE-TO-FACE contraction, and therefore graduate enrollment has grown every year since 2012. It is also noteworthy that while growth in “some online” grew each year until 2016, after that time there were far fewer new students following this study pattern. The unanswered question is where the proportions by format will return after two years of increasingly expanded exposure to online (and other remote) instruction forced by the pandemic.

**TABLE 5: GRADUATE - YEAR-OVER-YEAR FALL ENROLLMENT CHANGE BY FORMAT**



Master's degree production trends since 2012 tell a similar story and are largely free of the effects of the pandemic. Total degree production has seen steady growth each year (12 percent between 2012 and 2020), with FACE-TO-FACE programs contracting by 18 percent and online programs growing by 81 percent.

**TABLE 6: NATIONAL MASTER'S DEGREE PRODUCTION BY FORMAT**



## LOOKING FOR RESEARCH AND STRATEGIES ON ONLINE STUDENT ENROLLMENT?

Talk with our experts about how we can help you optimize your enrollment strategies and maximize the enrollment potential of your online programs.

Ask for a free consultation at [RNL.com/OnlineEnrollment](https://www.rnl.com/OnlineEnrollment).



## Solutions From RNL Online Enrollment Experts

Each of these challenges has a corresponding solution presented by RNL's online enrollment experts who are working with online programs around the country.



### Solution

These factors make it clear that for most institutions, the expansion of online programs is not an “if” but a “when” (and sooner rather than later). This first challenge is the central issue—online is a necessary element of institutional health going forward—but the remaining challenges (and accompanying solutions offered by RNL colleagues who work with dozens of institutions each year expanding online capacity) are meant to encompass all the issues that institutions will need to think through and solve in order to be a success.

Consider the following process to ensure maximum success:

- 1 Understand that the development of successful online programs is not an act of transition, but one of transformation. If the programs themselves are not configured in a manner that aligns with student preferences, prospective online students will move on to the next program.
- 2 Once programs conform to market demand, ensure that these programs are “visible” to prospective students through modern omnichannel marketing on the platforms and channels they use daily. People cannot “buy” what they do not know exists.
- 3 The content that is included in marketing communications must connect with prospective online students—using the right formats, featuring the right “stories,” and speaking to the motivations of online students.
- 4 The best marketing and content in the world will not result in enrollments if institutions do not also meet the expectations of prospective students in terms of initial response times, preferred communication channels, admission decision timelines, and much more.

*Scott Jaffe, Vice President for Graduate and Online Research, RNL*

## 2 The largest opportunity for online program growth is at the bachelor's level.

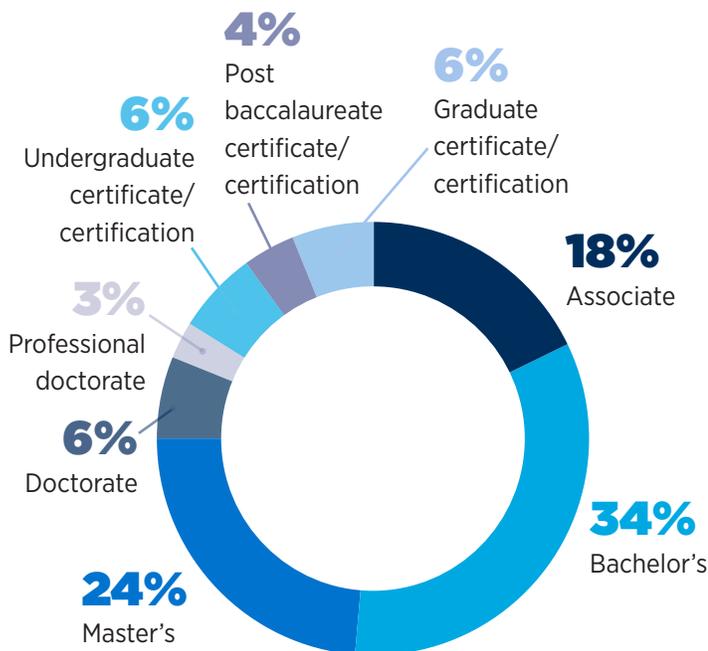
While many institutions have made inroads in the development of online master's programs, launching online bachelor's programs has faced more internal challenges. The responses to our survey make it clear there is a significant demand for both online bachelor's and online associate degree programs.

The most recent data available indicate that 50 percent of master's degrees earned in 2020 were among students enrolled in an online program (up from 46 percent in 2019), and that only 23 percent of bachelor's degrees were earned in online programs (up from 21 percent in 2019). It is also well known that many institutions have focused on online program development at the master's level. To what extent are these degree production numbers a function of supply as opposed to demand?

Our survey data also indicate that approximately 15 percent of overall demand is for non-degree, credit-bearing online credentials. While discussions about the expansion of non-degree programs have grown during the pandemic—as institutions have searched for new revenue sources—it is important to note that demand is distributed among no less than three credential types/levels: undergraduate certificates, post-baccalaureate certificates, and graduate (or post-master's) certificates. In addition to certificates, this credential area also includes credit-bearing certifications and licensures.

With regard to the online bachelor's market, there is a clear opportunity for institutions willing to grow their array of online bachelor's programs. Online bachelor's degree students comprise 34 percent of our sample, while they are less than half that percent in terms of recent degree production.

**TABLE 7: INTENDED ONLINE CREDENTIAL**

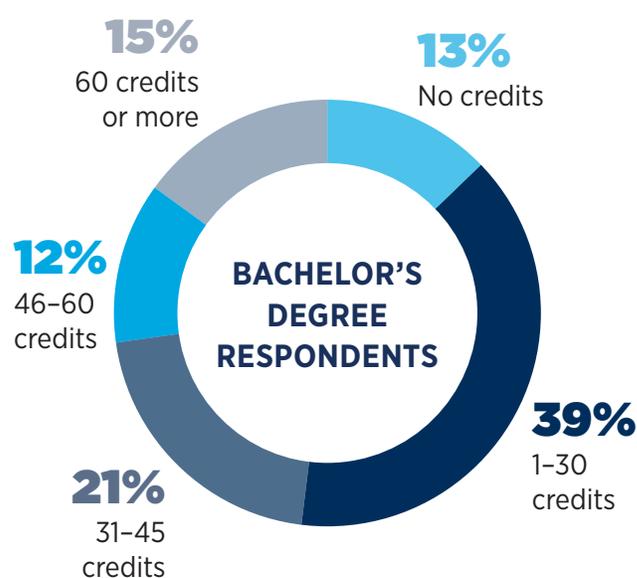


When reviewing these data by the age of the prospective student, it is clear that online bachelor's students are far more likely to be younger than older. (See Section 8 for more information on younger online students.)

**Previous credit:** An “online bachelor’s program” does not necessarily mean a program that is designed for students who have previously earned an arbitrary number of credits (typically 60 or an associate degree). Survey data indicate only 15 percent of those pursuing an online bachelor’s degree have earned 60 or more credits, while 39 percent have earned up to 30 credits and another 21 percent between 31 and 45 credits. These patterns apply relatively uniformly, regardless of the age of the online bachelor’s student. A generous and flexible policy on the acceptance of previously earned credit will benefit institutions seeking to attract online bachelor’s degree students.

**TABLE 8: PREVIOUSLY EARNED UNDERGRADUATE CREDITS**

(bachelor’s degree respondents only)





## Solution

These data indicate there is clear opportunity for institutions that can: grow their online bachelor's portfolio; ensure that these programs are marketed and positioned in a manner that they are visible to prospective students seeking a program; and structure programs in a manner that is consistent with how students want to study.

Program design is absolutely critical to balance the student's ability to successfully complete the program and the institution's ability to find scale and acceptable financial margins for each course section. Structural issues such as regimented cohort vs. broad course choice and tight program requirements vs. more flexible options will impact the student's ability to successfully complete the program and the institution's ability to find scale and acceptable financial margins for each course section.

In program design, those who understand how to develop pathways that allow for aggregation of course requirements—much like we think of the enrollment funnel—will be able to create scale while serving a number of student interests:

- **General education/liberal studies core:** To create scale in the online programs, the general education liberal studies curriculum should be universal for all programs. It should align to the learning outcomes of the more traditional, in-person programs, but should do so with limited course/discipline options than what is seen in more traditional curriculum structures. In doing this, institutions should find the greatest scale as demonstrated in the largest section sizes per term.
- **Major requirements:** Using the programmatic learning outcomes as a framework, explore if there are shared outcomes across the programs, and align program requirements to aggregate the largest number of students, across program interests as possible. While scale will not be as great as in the general education/liberal studies core, institutions should align with a focus on outcomes rather than courses and find additional opportunities to create scale in offerings.
- **Specializations/concentrations:** By aligning discipline niches to the major requirements and general education core, institutions will find there is an opportunity to serve greater student interest and align offerings to labor market demand. Successful scaling strategies for this group of courses is dependent on the number of times per year these courses are offered and how they are communicated to students in planning a degree pathway to graduation.

*Cherron R. Hoppes, EdD, RNL Chief Academic Officer, RNL*

### 3 There is no single discipline in which institutions can focus online program development and guarantee success.

During the years in which online education was expanding, institutions could be relatively confident that they could have some level of success if they could convince faculty and other stakeholders to launch online programs in a very narrow set of disciplines—nursing and business at the bachelor’s level, business and education at the master’s level.

An analysis of the degree production data between 2015 and 2020 (the most recent years for which data are available—without net effects of the pandemic) indicates that this was already changing.

**Bachelor’s:** In 2015, 21 percent of all online bachelor’s degrees were awarded in nursing programs (data combine all the pathways to earning a BSN) and 14 percent were earned in business administration. In 2020, both had grown at a healthy rate—nursing degrees by 39 percent and business administration degrees by 22 percent—but their “market share” of all online degrees produced only grew by about 1 percent in each case. Why? There has been dramatic proliferation of new online program subjects. In 2015, 484 program classifications (“CIPs”) were used to classify online program offerings. In 2020 that number had grown to 589.

**Master’s:** In 2015, 22 percent of all online master’s degrees were awarded in business administration programs, far exceeding any other program area. Curriculum and instruction programs comprised the next largest share (4.2 percent), followed by general teaching programs (3.5 percent). In 2020, although business administration programs reported 19 percent five-year growth, their total market share grew by only 1 percent. Both of the aforementioned education programs—in real numbers, in percent growth, and in terms of market share—contracted. Other programs have emerged as leaders: social work programs grew from 1.9 percent of all degrees to 3.8 percent of all degrees with 191 percent total growth, and family practice nursing grew from 1.1 percent market share to 2.3 percent with 220 percent total growth. The total number of different classifications (CIPs) used to report degrees continued growing from 593 in 2015 to 739 in 2020.

The diversity of intended subjects cited by our respondents is then not as surprising as it may have initially seemed. Business subjects continue to dominate, but schools that only offer business programs (at both levels), education at the graduate level, and perhaps healthcare at the undergraduate level will be leaving almost two-thirds of the online market to other institutions with more diverse offerings.

TABLE 9: INTENDED DISCIPLINE OF STUDY	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Business	23%	25%	25%
Education	12%	10%	9%
Health Professions	12%	7%	15%
Computer/Information Science	11%	16%	14%
Counseling/Psychology	8%	5%	7%
Social Services/Public Admin./Criminal Justice	6%	4%	5%
Arts and Humanities	5%	3%	5%
Social Sciences	5%	3%	4%
Engineering	4%	10%	6%
Biological/Physical/Earth Sciences	4%	2%	2%
Communications	3%	4%	3%
Other	7%	10%	5%

The biggest opportunity may be in online computer and information science programs. While computer science programs have seen recent contraction in IPEDS data, related programs have seen dramatic growth. Between 2015 and 2020, bachelor's programs in information technology grew 72 percent; master's level computer and information systems degrees grew 288 percent; and degrees in computer and information systems security grew 56 percent at the bachelor's level and 192 percent at the master's level.

When reviewing these data by the age of the respondent, there may be some emerging trends that institutions will want to consider. Online students under 30 are considerably less likely to enroll in a business program, while they are relatively consistent with other age groups in other leading disciplines like computer/information science and health professions. The youngest online students have distributed their interests across all fields, but those age 25-29 indicate a far stronger level of interest in education than any other age group.

**Business administration:** Because of the historic dominance of business subjects in online education, business students were asked two additional questions. Our first finding is that while other business degrees (led by finance and marketing degrees according to IPEDS data) have gained traction, online business students continue to strongly prefer business administration (82 percent of undergraduates and 89 percent of graduate business students). There was no significant differentiation in these data when results were tabulated by age.

## TABLE 10: PLANNING TO ENROLL IN A BUSINESS ADMINISTRATION PROGRAM

(among business student responses)



### **Solution**

These data and the recent trends in online enrollment by discipline reinforce the need for universities to make research-informed academic planning decisions—cognizant of leading and lagging economic indicators—and remain nimble in program design.

An environmental scan provides essential information about the current market situation of the region in which the college operates as well as the national marketplace. Key indicators such as program completions, labor department trends and projections, and job posting data should drive academic program analysis. Which programs deserve increased investment, and which programs need reshaping or sunseting? These decisions have multiyear implications on accreditation, staffing, and budgeting, so they should not be taken lightly or driven solely by past practice.

After this step, a deeper dive into competitor program profiling will allow schools to compare and differentiate offerings for better market positioning. It is here that changes in pricing, time to completion, instructional format, admissions requirements, and marketing strategy should be made.

These recommendations are valuable because they put the students' best interest at the core of academic planning. With a focus on attracting, enrolling, serving, retaining, and then placing students in growing careers, institutions will stay at the forefront of both growth and stability.

*Holly Tapper, Vice President for Graduate and Online Solutions, RNL*

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#### **4 Online students seek programs with shorter classes that can be taken two at a time and are willing to participate in synchronous activities as long as they solve the engagement challenge.**

Institutions offering online programs that differ little from their FACE-TO-FACE programs with the exception of the delivery mechanism are not likely to be successful. This means that developing attractive online programs must be more of a transformation than a transition.

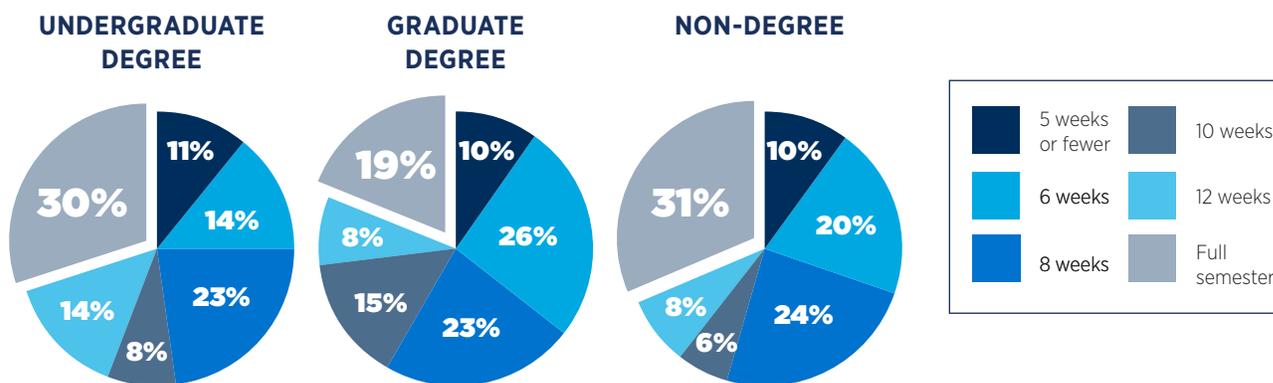
In that regard, how do online programs need to be built in order to be attractive to the intended audience? Here are four elements of successful online programs based on data from our survey participants:

**1**

**Accelerating courses:** Perhaps nothing is more important than shortening the length of each course. While the acceleration of time-to-degree is important to all nontraditional audiences, reducing the total time of each course is of critical importance to online students. Just 30 percent of undergraduate online students and 19 percent of graduate online students plan to enroll in semester-length courses. Demand coalesces between six and 10 weeks, with 45 percent of undergraduates and 64 percent of graduate students planning on enrolling in programs that offer classes of this length. This is a strong endorsement of programs in which the traditional semester is split into two terms, typically of seven to nine weeks.

These preferences are quite consistent across all ages, with the notable exceptions that younger (under 25) and older (45+ years of age) online students are somewhat more likely than all others to prefer semester-length courses. For the younger students, this is often because that is closest to their recent traditional educational experiences; for the older, it is also closest to their educational experiences in the past. For all those in the middle, the advantages of acceleration outweigh the comfort that their previous experiences may bring to their next level of education.

**TABLE 11: PREFERRED LENGTH OF COURSES**



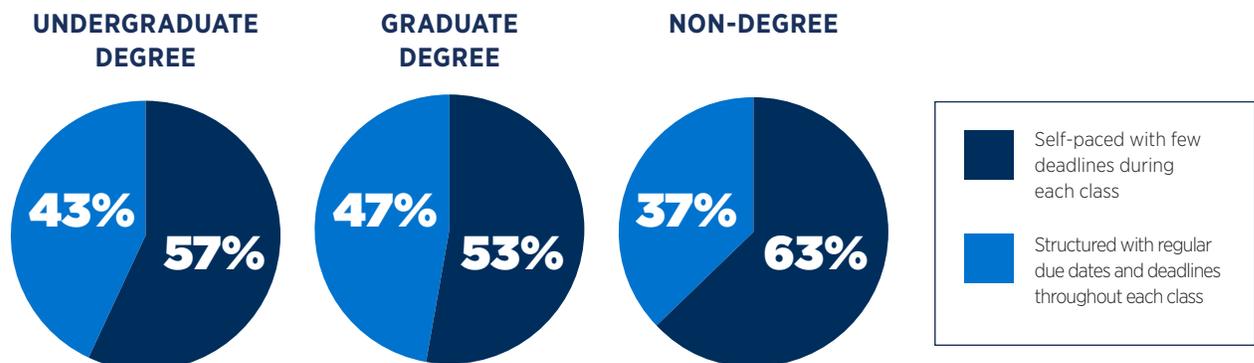
**2 Course stacking:** Many FACE-TO-FACE programs designed for adults encourage busy working adults to enroll in one course at a time—perhaps in an accelerated format. This has the unintended consequence that a program may take an inordinately long time to complete. More than 40 percent of online students at all levels plan to enroll in two courses at a time, while an additional 20 percent plan to enroll in three courses at a time. By allowing students to stack courses in an accelerated term (see previous point), this allows many online students to:

- Qualify as full-time students for the purposes of financial aid.
- Use this as the easiest path to accelerating their time to degree.

TABLE 12: PREFERRED NUMBER OF COURSES PER SEMESTER/TERM	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
1	17%	21%	30%
2	44%	41%	37%
3	21%	23%	23%
4 or more	17%	15%	11%

**3 Balancing self-paced with structure:** Online students at all levels are relatively evenly split between those preferring self-paced online programs that allow students to make their own way through the material for each class and those who prefer more structure throughout the lifespan of each course. Preference for self-paced study has increased (by approximately 10 percent) in comparison to pre-pandemic studies conducted by RNL, and this may be due to the increased prevalence and experience with self-paced work caused by the pandemic. There is little difference in results by age except that the oldest online students (age 40+) are even more interested in self-paced programs.

**TABLE 13: PREFERENCE: SELF-PACED OR STRUCTURED**

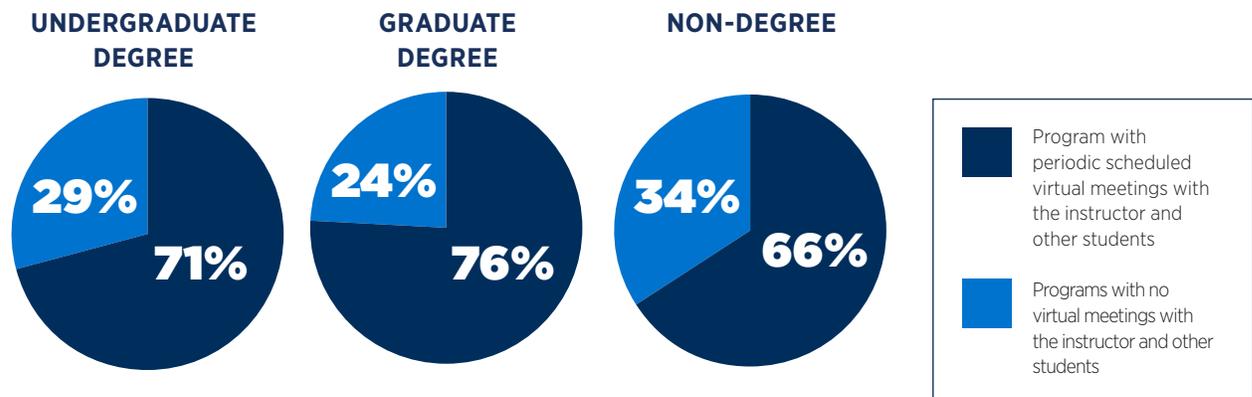


**4 Synchronicity for engagement:** The conventional wisdom is that students seeking online study do so to avoid any specific time commitments. Many studies have documented that upward of 80 percent of online students prefer “asynchronous” online programs over “synchronous” programs that require students to regularly log in at set times for class sessions. While that is true, online students also crave engagement, and poor engagement with instructors and classmates is often the most frequent point of dissatisfaction in online programs.

With this in mind, we asked very specific questions aimed at understanding demand for programs with some synchronous delivery rather than for overall synchronous programs. This was done to help program developers understand just how far they could go in incorporating synchronous activities into their program design to address the “engagement challenge.”

Online students indicate that they had a quite clear preference for programs that offer periodic synchronous activities (as opposed to regular) that allow for virtual meetings with the instructor and classmates. If we had phrased our question “programs that require regular scheduled class sessions,” FAR fewer respondents would have selected the “synchronous” option. This question proves a concept of essential importance: If the requirement is *reasonable* and if students explicitly understand that these sessions are designed to *facilitate interaction* between instructors and students, they are far more attractive than many people may think.

**TABLE 14: PREFERENCE: SYNCHRONICITY**



We asked only those respondents who prefer a program with periodic scheduled virtual meetings how frequently they would prefer such meetings to occur. The largest proportion—about one-third at each level—said twice per course, with an additional 20 percent indicating three times per course. This endorses the idea of some synchronous meetings without indicating demand for fully synchronous online programs.

## **Solution**

It may come as no surprise that the results here indicate that students want an educational experience that is shaped to meet their needs. This is especially true in the online world, where universities are no longer competing with a few schools in their region but are now vying for students across the nation. As competition increases and students have more selection, they will choose to enroll at the institution that offers programming that fits their busy lifestyles and their academic/career goals.

Student-centric academic planning, influenced by market research and data, is essential at both the program and course level. When universities utilize secondary sources for competitor profiling, as well as primary research on student demand to inform decision making, enrollment and retention growth will follow.

At the program level, stacking courses to shorten time-to-completion and allowing self-selection in course registration provides students with the opportunity to flex academic commitments to meet their busy schedules. This requires thoughtful program design in terms of course pairings, rigor, and progression. Success in this area will flow into increased points of entry into the program and the number of intakes per year, possibly impacting entrance requirements. Institutions that excel at flexible program design also have supportive back-end processes to assist with admission, registration, financial aid, and advising. A comprehensive review and mapping of these processes will be critical to improvement as institutions move in this direction.

At the course level, meeting the requirements of regional, national, and discipline-specific accreditors while fitting content into a shorter timeframe is challenging. Adding the student preference of asynchronous learning with peer/faculty engagement into the mix requires careful thought and planning. This is where the use of instructional designers has become more and more essential to online program development. Technology applications and tools are continually evolving, and students are experiencing learning on their tablets, computers, and phones—faculty cannot be expected to have the expertise needed to develop sophisticated online experiences. But skilled designers can come alongside subject matter experts to collaboratively create course material that meets the students' desires as well as the required academic components.

***Holly Tapper, Vice President of Graduate and Online Solutions, RNL***

Intentionality for developing courses that include synchronous engagement is absolutely key. Post-traditional students choose online because the pressure of forcing time and place of traditional course scheduling doesn't work for all they are juggling. Faculty who desire maximum engagement should include the synchronous dates and times for activities in the course description available at registration and should provide alternatives for participation such as recorded sessions. Last-minute announcements of course meetings—required or not—will enhance your students' stress levels and decrease satisfaction in the learning experience.

***Cherron R. Hoppes, Ed.D., RNL Chief Academic Officer, RNL***

## 5 Online students search and research programs online, requiring robust and sophisticated digital marketing that engages them across multiple digital channels.

Once institutions have created online programs structured in a manner that will be attractive to prospective online students, they must then ensure that those programs are going to be visible to students looking for such programs. While there is no single tactic that can guarantee that programs reach students where they are looking, survey data make clear that a comprehensive, omnichannel digital marketing strategy is essential.

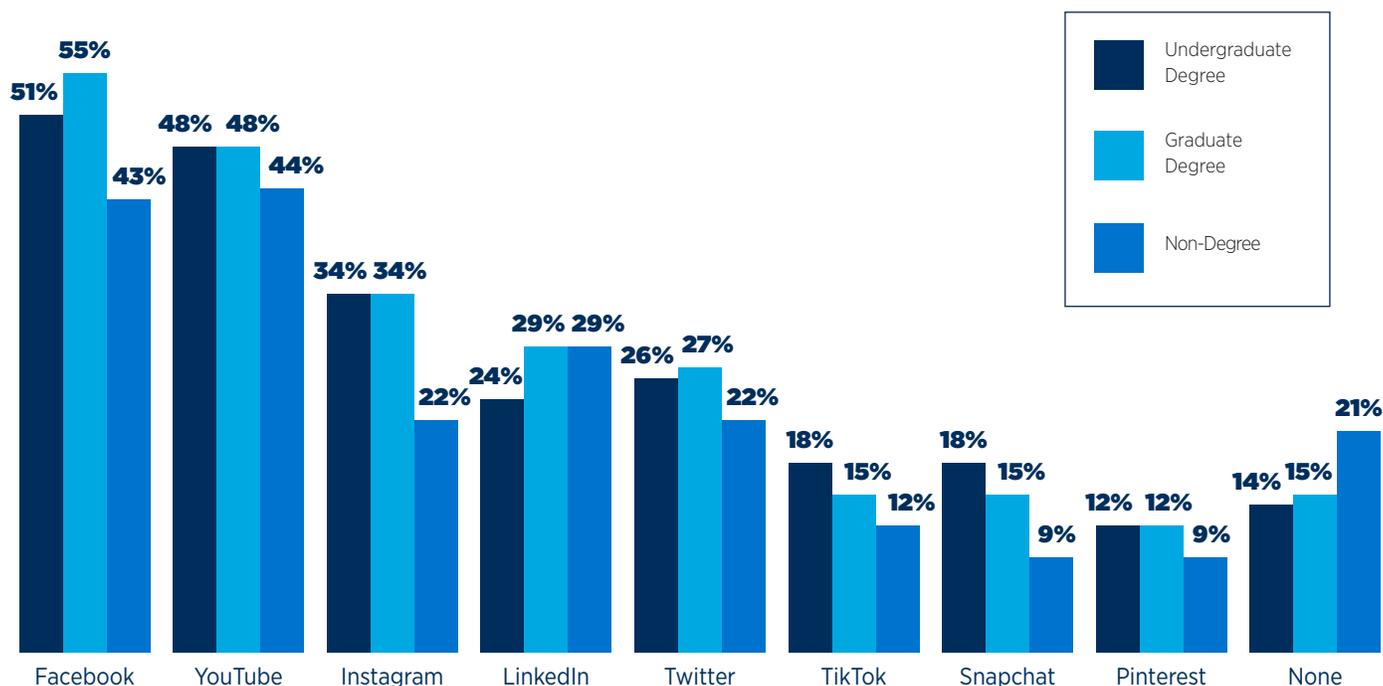
According to our respondents, nothing is more important than search engines. More than 85 percent of both undergraduate and graduate degree students indicated that they used a search engine to identify online programs of interest. Three-quarters also used college/program search sites, which most frequently are sites on which institutions are paying to advertise their programs (under the guise of sites like “Best Online Programs in X”). Results by age bracket are remarkably consistent across age groups, with the exception that online students over age 45 were considerably less likely to use social media, streaming TV, and YouTube or similar video platforms.

<b>TABLE 15: SOURCES USED TO FIND ONLINE PROGRAMS OF INTEREST</b>	<b>UNDER-GRADUATE DEGREE</b>	<b>GRADUATE DEGREE</b>	<b>NON-DEGREE</b>
<b>Search engines</b>	89%	85%	95%
<b>College/program search sites</b>	77%	78%	61%
<b>Ads on social media</b>	58%	73%	57%
<b>Someone I know</b>	53%	56%	56%
<b>Ads on websites</b>	54%	52%	46%
<b>Ads on streaming TV</b>	51%	47%	36%
<b>Ads on broadcast or cable TV</b>	46%	50%	39%
<b>Videos on YouTube or elsewhere</b>	44%	48%	48%
<b>Printed materials from institutions</b>	38%	36%	31%
<b>Ads in newspapers, magazines, etc.</b>	34%	38%	27%
<b>Printed rankings guides</b>	32%	31%	27%
<b>Ads on streaming radio</b>	28%	27%	18%
<b>Billboards/other outdoor ads</b>	28%	24%	19%
<b>Ads on local broadcast radio</b>	26%	26%	13%
<b>Ads on podcasts/other streaming audio</b>	26%	18%	18%

**Social media:** The extent to which colleges and universities have leveraged social media platforms to raise the visibility of their programs in recent years has clearly paid off. Nearly 60 percent of online undergraduate degree students and online non-degree students along with 75 percent of online graduate students indicate that they used social media to learn about online programs during their search. Which platforms did they use?

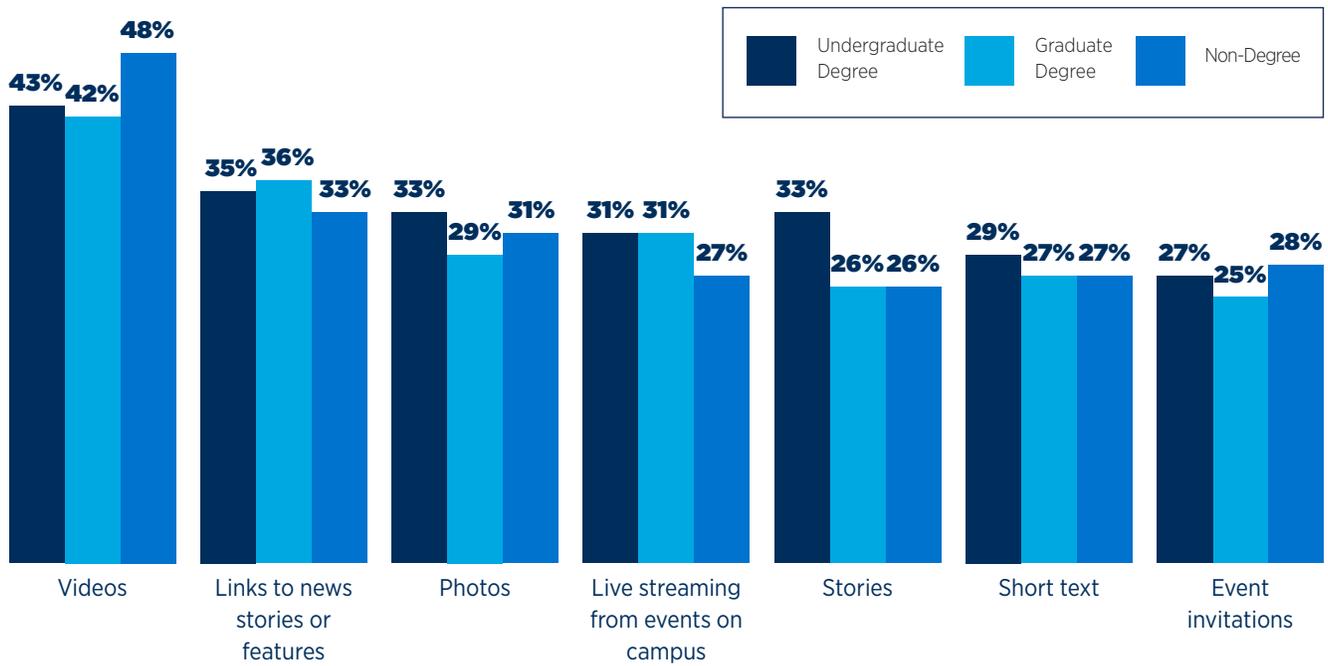
Facebook (2.9 billion users in 2022) was most frequently cited, followed by YouTube (2.6 billion users). Interestingly, Instagram is also large (1.2 billion users), but far less likely to be cited by respondents. LinkedIn is a far smaller platform (722 million users), but fares quite well alongside the larger platforms. There is little differentiation by age group, with the exceptions of the youngest respondents being less likely to cite Facebook, and the oldest (50+) more likely to indicate that they didn't rely on social media at all (45 percent).

**TABLE 16: SOCIAL MEDIA SITES USED IN SEARCH**



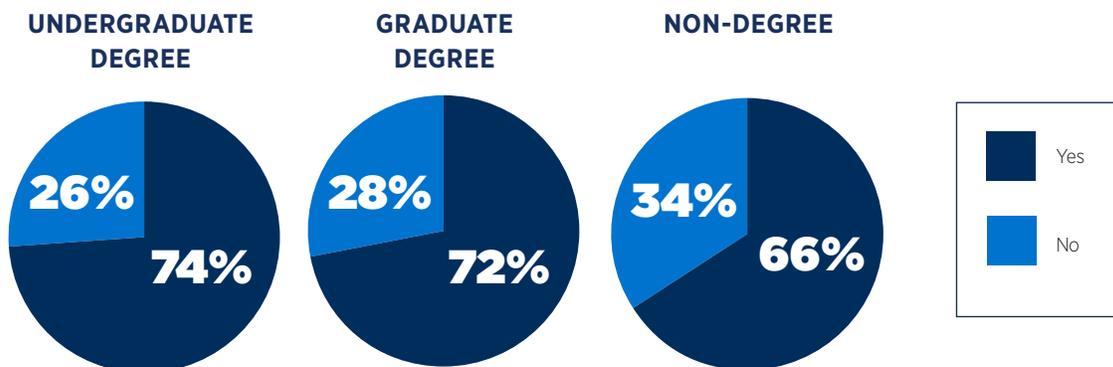
Video is the most preferred content that prospective online students want to access on social media sites about programs and schools of interest. There is also little differentiation by age groups, with no variances of more than about 5 percent.

**TABLE 17: PREFERRED CONTENT ON SOCIAL MEDIA SITES**



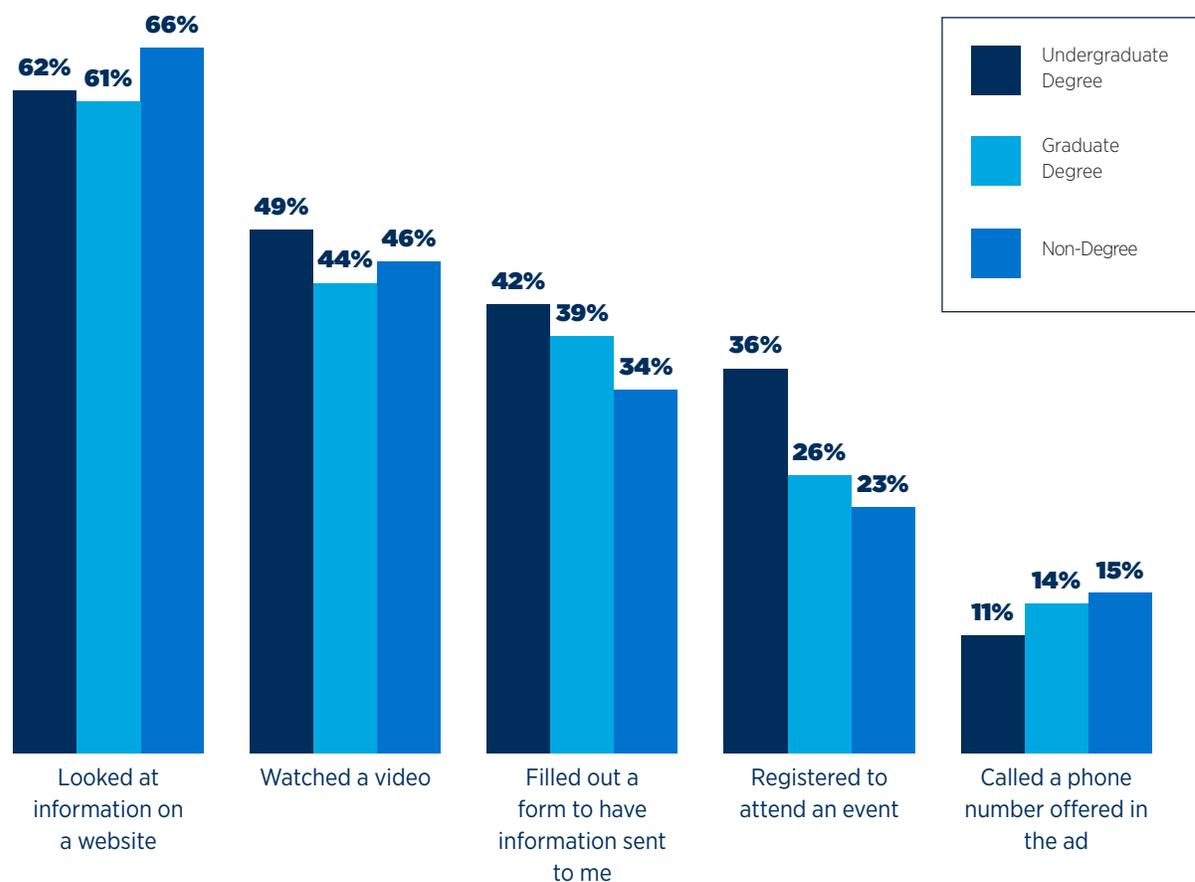
**Digital ads:** Prospective online students not only see ads on social media (and other) platforms, but they also take action. Nearly three-quarters of respondents indicated that they have clicked on digital ads for online programs/institutions. Results were consistent among age groups except for those students age 45+, who were 20 percent less likely to have clicked on a digital ad for online programs.

**TABLE 18: CLICKED ON DIGITAL ADS FOR ONLINE PROGRAMS**



Respondents were most likely to review program information after clicking on a digital ad, followed by watching a video. Perhaps of greatest importance to proving the efficacy of digital advertising is that 40 percent filled out an information request form for an online program. Again, the only significant divergences from these patterns were among respondents 45+ years of age, who were about half as likely to fill out an online information request form.

**TABLE 19: ACTION AFTER CLICKING DIGITAL ADS**



## Solution

Creating the program (i.e. product) is not going to achieve the *Field of Dreams* hope that “if you build it, they will come.” Once a university establishes online programs that are truly aligned with market demands, the challenge becomes effectively promoting these programs so that prospective students know your institution offers them. A distinct effort and investment to inform, attract, educate, influence, and convert the market must be undertaken to achieve enrollment and revenue growth.

The above data provide a treasure trove of intelligence that should be the basis for the strategy of any university/school/program to attract leads and convert them enrollments. All too often, institutions believe that students (the market) will come to them, rather than meeting students where they are and influencing them to draw nearer and farther down the funnel.

A first step is understanding where students are. As the data indicate, more than half of the online leads come from two key sources: digital advertising and search engines (search engine optimization/SEO). As we review the sources in Table 15, eight of the top 10 fall within digital advertising and SEO. Universities therefore need to commit the necessary resources in digital advertising and SEO in order to maximize potential and drive sustainable growth.

**Digital lead generation/digital advertising:** In order to drive a successful digital advertising strategy, universities need to know not only where people reside geographically, but also digitally—what their online and buying behaviors are and influencers that drive progression and action. At RNL, we work with partners to develop as many as three personas for each program we market based on geographic, psychographic, and demographic information that becomes a key foundation of all that we do. They drive the type of creative and messaging we employ, and the channels and digital locations where we know they reside. We take the best practices in program-specific marketing and messaging, but further enhance it by making it persona specific within each program.

Once you identify how, where, and to whom you will be marketing to, the next question is what channels work best. Google ads, social media sites, etc. are continuous sources you can leverage, but understand that as video continues to become more influential (Table 17), your ability and capabilities to meet those needs and demands will be key—whether by including video in your advertising or ensuring you leverage sources like streaming TV.

**SEO:** Organic leads—those not generated by digital ads—convert at the highest rates. At RNL we see conversion rates for organic leads at seven times higher any other source. Given that this study indicates that search engines are the highest leveraged source used by prospective online students to find programs of interest, it’s clear your website is not only a window to the institution, but a tool that can either attract or detract the market from your program(s).

Students predominantly search by program and outcome. Therefore, an institution needs to understand that SEO is a process and not an ongoing event. Institutions need to ensure that prospective students will find their online offerings on page one of search results (and preferably in the top half). Once you fall to pages two and beyond, it is highly unlikely that you will be noticed.

Concerted SEO strategies are critical to appearing on page one of web search results. This does not just mean including the right keywords, but also providing information considered meaningful to the market. Make sure that your keyword-rich content is also value proposition rich! In doing so, not only do you favorably rank via Google’s algorithm, but you will also more effectively educate and influence visitors drawn to your site to take the next call to action.

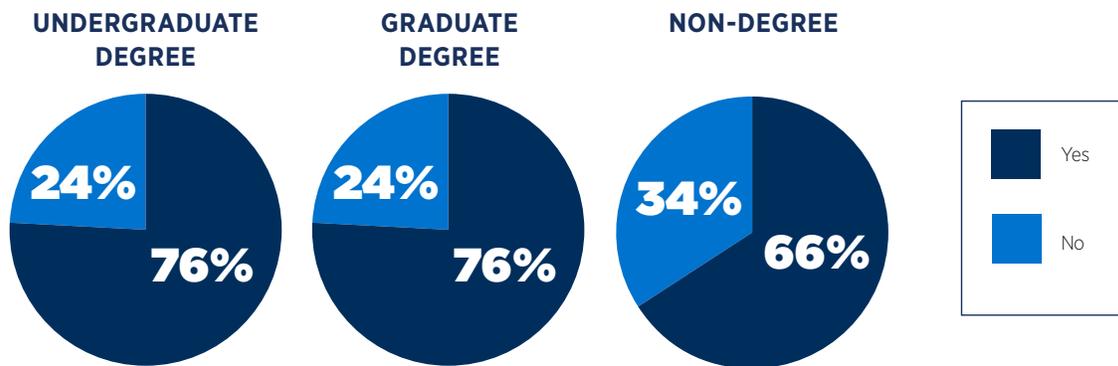
**Charles Ramos, Vice President – Graduate and Online Solutions, RNL**

## 6 Online students expect video, attend virtual recruiting events, and want mobile-friendly content.

One of the clearest threads that runs throughout this report is that prospective online students expect a sophistication in digital content that is unparalleled in any study RNL has conducted. In comparison with similar studies, more respondents watch video as part of their enrollment decision-making process, more attend virtual recruiting events, and more do things related to recruitment and enrollment on their mobile devices than ever before.

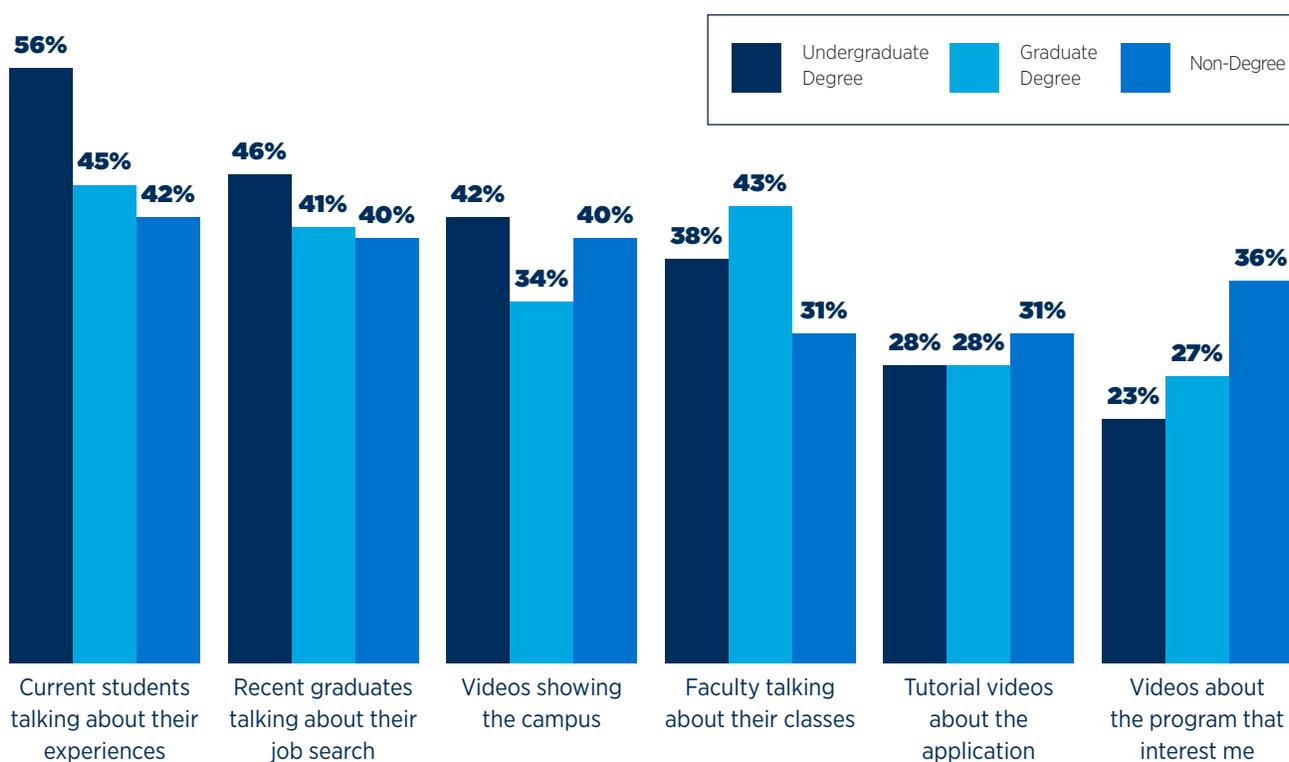
**Video:** Perhaps nothing in the search and decision-making process has changed more dramatically in recent years than the extent to which prospective students—of all types, not just online—have come to watch videos as a primary method of learning about and connecting with programs and schools. More than three-quarters of degree-seeking respondents indicate that they have watched videos during their search (while two-thirds of non-degree students have done so). Students under the age of 30 are even more likely to do so, while those over 50 are significantly less likely to do so.

**TABLE 20: WATCHED VIDEOS ON INSTITUTIONAL WEBSITES DURING SEARCH**



*Video content:* There is a strong preference for video to focus on students and recent graduates over video that features professors talking about their programs. Videos described as “about the program that interests me” without specifically including students, alums, or faculty were the least likely to be preferred. It is also interesting that videos showcasing the campus are also popular with prospective online students. This may be driven by the fact that many online students want to feel a genuine connection to the institution in which they enroll, and knowing the campus is one way to do that. There is little differentiation by age, except for older online students showing more interest in overview videos of the program.

**TABLE 21: PREFERRED VIDEO CONTENT**



*Video length:* While students do not prefer the shortest of snippets (15 seconds or less), the largest proportion prefer videos under 30 seconds, while one-quarter prefer videos of either 31-60 seconds or one to two minutes. There is little differentiation by age, with the exception of older online students showing considerably more interest in the longest videos of more than two minutes.

TABLE 22: PREFERRED VIDEO LENGTH	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
15 seconds or less	3%	6%	5%
16-30 seconds	33%	28%	28%
31-60 seconds	28%	26%	18%
1-2 minutes	24%	24%	36%
More than 2 minutes	13%	16%	13%

**Virtual recruitment:** It is not surprising that prospective online students were more likely to participate in a virtual recruitment event than a face-to-face event (as presented in Tables 23 and 24). They have come to be used by online students far more frequently than either video calls or telephone calls and are far more likely to be deemed as the most effective way to move their decision making forward (as presented in the second of the two tables below). It is likely that the pandemic has played some role in not only the participation in virtual events, but also their being viewed as effective and efficient ways of learning about online programs. There was almost no differentiation in either participation or preference in any age group.

TABLE 23: PARTICIPATION IN RECRUITMENT EVENTS	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Virtual information sessions, open houses, or campus tours	58%	61%	65%
Face-to-face information sessions, open houses, or campus tours	47%	51%	35%
Video call/interviews	26%	29%	37%
Telephone call	17%	19%	21%

TABLE 24: MOST EFFECTIVE RECRUITMENT EVENT IN MOVING FORWARD DECISION MAKING	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Virtual information sessions, open houses, or campus tours	41%	42%	52%
Face-to-face Information sessions, open houses, or campus tours	39%	39%	23%
Video call/interviews	11%	12%	17%
Telephone call	9%	6%	8%

It is also important to note the proportions that participated in face-to-face events (nearly half of online students), as this is an indicator that many online students live within driving distance of the programs/institutions that interest them and are leveraging online as the most convenient and flexible way to access these institutions of preference.

**Mobile devices:** Prospective online students are highly likely to conduct a considerable proportion of the actions taken during a search for a program on their mobile devices. Respondent data make it clear that institutions should not only have an information request form available on their website, but also that forms should be designed for seamless use on mobile devices. Perhaps more surprising is that more than 40 percent completed their applications and/or registered for classes on a mobile device. This may present more of a challenge for web designers, but it will be well worth the effort taken. The same can be said for course registration pages. There was little differentiation by age group, with the exception of the fact that 20 percent of online students over the age of 50 do not use a mobile device for any aspect of their program search.

TABLE 25: SEARCH/ENROLLMENT FUNCTIONS DONE ON MOBILE DEVICE	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Request information about a program	58%	63%	59%
Request information about the school	48%	45%	44%
Complete application	44%	39%	47%
Register for classes	43%	34%	44%
Schedule virtual or face-to-face meeting	40%	37%	33%
Attend a webinar	27%	26%	27%
Register for virtual or face-to-face open house	24%	23%	28%
Use chat tool	23%	22%	26%
I won't use my mobile device for any of these things	4%	3%	7%

## Solution

It used to be that when a marketing team decided to integrate video, the biggest question was how they'd access the tools they needed to produce a high-quality product. Now with so many high-quality tools literally in the palm of our hands, that's rarely the concern. As you can see in the data presented here, the big questions you should be asking now are what meaningful information do you have to share, who should deliver the message, and how succinctly can you make your point?

**Meaningful information:** When deciding what information is meaningful to students, it can be tempting to focus on what you think they should be asking about or the best features your institution has to offer. While it's good to eventually integrate that information, your top priority for SEO, continued viewing, and generally making a connection is to anticipate and answer what's on their mind. You can unlock the hottest topics with your digital strategist and by asking your new students what questions they had while making their decision to attend your institution. The data you need is available to you if you know where to look.

**The right spokesperson:** If you consider your own experience as a consumer, the fact that prospective students want to hear from current students and alums may not surprise you. If you were thinking of buying a new vacuum cleaner, would you want to hear the salesperson describe it? Or would you feel like you'd get better information from someone who had owned the vacuum you're considering for a year?

In addition to sharing the most meaningful information from the right person, it's also important to pay attention to the environment to ensure that where your spokesperson is aligns with your brand message. Are you promoting an active and engaging campus? If so, you may share a well-produced but informal interview with a student at a campus event—an energizing bustle of student activity behind them. Are you known for your science program? Interview an alum in their lab or, better yet, visit a lab on campus.

**Keeping it brief:** When we know a topic well or are excited to share it with others, we have the tendency to say too much. This is especially problematic today as audience attention span gets shorter. Our desire to go on too long is likely to translate to them abandoning a video.

As the research indicates, people are interested in short videos, so what do you do if you have a lot to say?

- Use a script if it can be delivered genuinely. If not, try talking points. This will help keep you on task.
- Always have multiple people review your content and specifically ask them what you could potentially cut. Asking them what could be taken out will make it easier for them to give you honest feedback about extraneous information.
- Create multiple videos of shorter length. You can satisfy those who only wanted a short bit of information while also enabling others who want to learn more to keep watching.

With the above concepts in mind, the next significant hurdle is creating new habits. If you implement structure, provide a timeline for when you'd like to review content, and ask them to regularly share industry insights with you, they will help you continuously update your video content, making it a more manageable project.

*Amy Jauman, Director of University Partnerships, RNL*

## 7 Online students are highly attuned to the cost of tuition and fees.

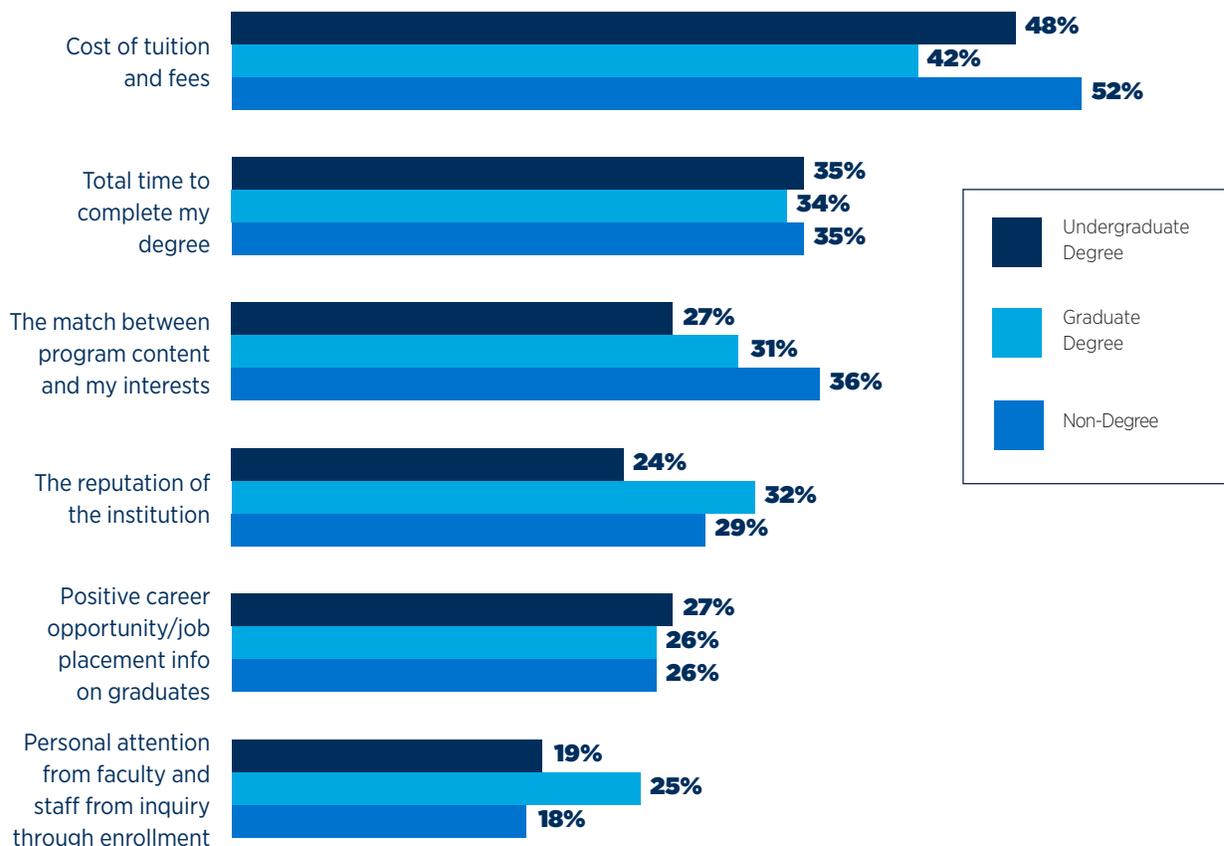
The enrollment decisions of online students—at all levels—is often driven by the cost of tuition and fees. Given that this is true, it is vital that institutions make finding that information easy for visitors to their websites and in other content. For online students who can select a program anywhere in the country, it is important that institutions understand what other programs cost.

Competitive tuition is vital. Annual IPEDS tuition and fee data for 2020 indicate that the average annual tuition for an online MBA was \$8,042 at public institutions (in-state) and \$15,503 at private institutions; online master’s of public health were \$8,970 at public institutions and \$18,256 at private institutions; online bachelor’s of psychology programs were \$7,414 at public institutions and \$23,191 at private institutions; and, online bachelor’s of business administration were \$6,826 at public institutions and \$22,066 at private institutions. Competitive tuition is even more important for online programs than face-to-face ones because programs are often being compared side by side with less “loyalty” to a particular school than in other intended instructional formats.

**Cost in enrollment decisions:** When asked to identify the three principal factors in their enrollment decision, the cost of tuition and fees was selected by nearly 50 percent of undergraduate degree students, more than 40 percent of graduate degree students, and more than 50 percent of non-degree students. Cost was almost twice as frequently cited as the match between content and interests (the top choice in RNL’s 2021 study of the graduate market) or the reputation of the institution. Cost is of even greater concern to older online students (those 45+ years of age).

**TABLE 26: MOST IMPORTANT ENROLLMENT FACTORS**

(Respondents chose their three most important factors.)



**Tuition information on websites and materials:** Many institutions bury tuition information for a variety of reasons. This is a mistake. Given the proportion of prospective students who indicate that tuition and fee information is among the most important things they need to be able to find when researching online programs, institutions need to make this easily accessible (ideally within one click from a program home page/landing page as well as the institutional home page).

<b>TABLE 27: MOST IMPORTANT INFORMATION ON INSTITUTIONAL WEBSITES</b>	<b>UNDER-GRADUATE DEGREE</b>	<b>GRADUATE DEGREE</b>	<b>NON-DEGREE</b>
<b>Cost/tuition information</b>	38%	37%	41%
<b>A list of programs or degrees</b>	31%	34%	29%
<b>Financial aid information</b>	35%	23%	29%
<b>Detailed information on available online programs</b>	28%	31%	36%
<b>Admissions requirements/admissions process</b>	28%	30%	29%
<b>Information on the career outcomes of recent graduates</b>	19%	19%	21%
<b>Information on related careers</b>	19%	18%	18%
<b>Program modality details</b>	18%	23%	21%
<b>An overview of the schools mission, values, and similar details</b>	15%	14%	16%
<b>Virtual tours</b>	14%	14%	13%
<b>Videos featuring faculty</b>	13%	14%	10%
<b>Open house/other admissions event information</b>	13%	12%	7%
<b>Videos featuring current students</b>	12%	11%	10%
<b>Message from the dean or program director</b>	10%	8%	8%

## **Solution**

Transparency around the sticker price is just the first step. If your programs offer scholarships or grant opportunities, clearly articulating how students may qualify for those awards will begin to highlight ways prospective students can save on the cost of tuition. Moving the conversation from sticker price to net price is imperative given how the driver of “cost” is an important factor in enrollment behavior.

Beyond tuition transparency, it is also imperative to proactively communicate the value and affordability of your online programs to your prospective students. Case studies highlighting how recent students afforded your programs and how those programs have led to career advancement and personal development could be a powerful story to those who are on the fence between your programs and your competitors’. Ideally, this communication is integrated into your marketing materials and lives on your program website. Having between five to 10 pages of value and affordability content with real-life case studies and student and alumni stories will best position your institution to serve the desires of prospective online students.

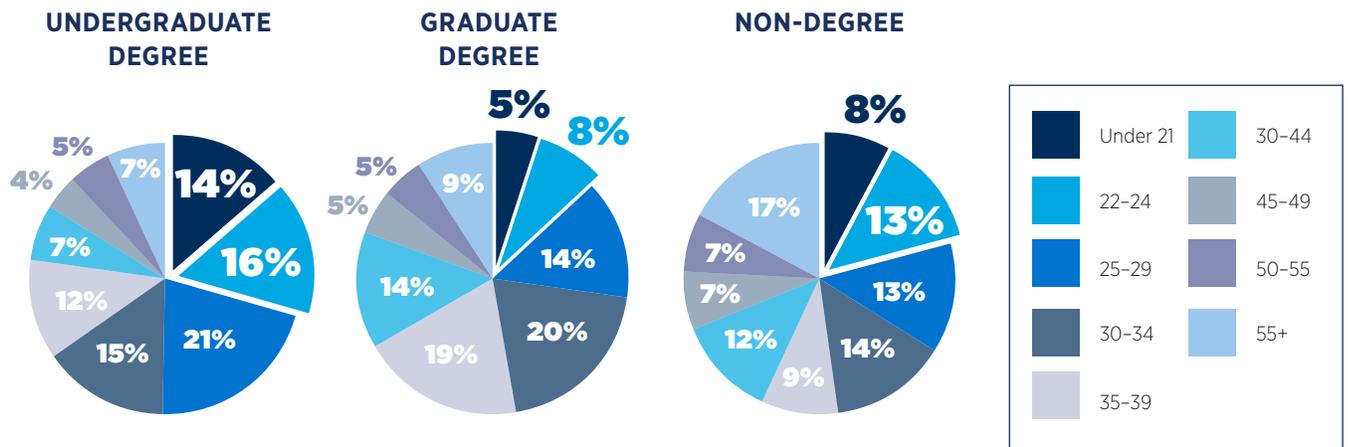
*Aaron Mahl, Vice President, Graduate and Online Solutions, RNL*

**8 Online students are younger than you may think—24 percent of our respondents were under the age of 25.**

Online programs are often considered the 21st century “adult” program. While this is true—and institutions do need to serve busy, multitasking adults—online programs are attractive to students of all ages among the vast array of students who do not have the “luxury” of being able to consider a more traditional education. One might argue that institutions unwilling to offer online programs to students who could never enroll in a traditional program (particularly undergraduate) are denying vital access to higher education.

What our survey makes clear is that one-quarter of online undergraduate prospective students are of “traditional” age (under 25 years of age), while about half that proportion of online graduate prospective students are in that age bracket.

**TABLE 28: AGE OF RESPONDENTS**



Institutions are often concerned that younger students will have different preferences than their older counterparts—and while they may have unique needs in terms of student support, they are far more alike than different from older students. In fact, when reviewing all our survey data by five-year age blocks, the oldest online students (those 45+ years of age) are far more different from the norm than are the youngest students.

Institutions that have not offered significant numbers of online undergraduate programs may not realize that a student who is attracted to online education bears little resemblance to a traditional undergraduate. By definition, they must be more organized, more self-driven, and likely more mature for their age.

**Age by credential level:** Perhaps most interesting among our findings is that far more individuals under 25 are pursuing a bachelor’s degree than an associate degree—proportions similar to the next five-year bracket, but quite different from older online students.

TABLE 29: INTENDED ONLINE CREDENTIAL	UNDER 25	25-29	30-34	35-39	40-44	45-49	50+
Associate degree	16%	12%	14%	15%	14%	11%	20%
Bachelor’s degree	47%	46%	29%	25%	18%	24%	12%
Undergraduate certificate/certification	8%	4%	5%	3%	4%	7%	8%
Post baccalaureate certificate/certification	3%	3%	3%	3%	7%	5%	5%
Master’s degree	14%	18%	27%	29%	36%	28%	15%
Graduate certificate/certification	4%	4%	5%	4%	6%	12%	9%
Doctorate degree	2%	4%	7%	9%	4%	7%	6%
Professional doctorate	2%	3%	4%	5%	3%	0%	3%

**Different demands among online students under 25:** In scanning data organized by age for more than 40 questions in this survey, there were only a handful of instances in which there was considerable differentiation in the preferences of prospective online students under the age of 25 (a difference of 10 percent or more from the average of all respondents). These differences include:



**SEARCH:** When searching for programs, they are more likely to rely on college/program search websites to inform their decision, less likely to have remembered ads on other websites they were visiting, and more likely to have used printed ranking publications.



**PROGRAMS:** Their planned discipline of study is distributed more broadly and somewhat less likely to be in business than other age groups. Among business students, the most popular concentration is marketing as opposed to finance among all other age groups.



**COURSE LENGTH:** They are more likely to prefer semester-length courses and to plan to enroll in four or more courses at a time.



**INFORMATION:** When gathering information about programs of interest, they are less interested in detailed program information and more interested in information about the institutions’ mission, values, and history.



**VIDEO:** They are even more likely than all other age levels to watch videos as a key element in their enrollment decision-making process.



**PERSONAL ATTENTION:** In their enrollment decisions, they are more likely to put a premium on the level of personal attention they will receive from faculty and staff and less likely to find the match between their personal interests and the content of the program important.

## **Solution**

As schools become more conformable and open in offering fully online or hybrid opportunities—whether providing degree programs or certification options in this modality—that openness has been more slanted toward adult learners and graduate students. Many schools feel that offering younger, traditional-aged students the option of an online program/degree would cannibalize the school’s ability to enroll them full time and/or as a residential student. What administrators and faculty fail to realize is this population of more traditionally aged students would have been a market never available to them. Therefore, they would have never enrolled, or realized revenue from, these students if it was not for their online offerings.

Considering the enrollment and revenue potential that exists with those under 25, it enhances the need to ensure that communications and digital advertising strategies include the segmentation of messaging and creative to resonate with younger populations, along with the more adult market. It further requires a school to develop multiple personas to include younger populations that will inform and affect channel, messaging, and creative strategies. It also challenges marketing departments at each school to maintain the bandwidth and skillset necessary (or strategically outsource it) to stay on pace, if not in front, of market trends with those younger populations—whether tied to online behaviors, emerging social media options, understanding video sources and preferences, etc.

What does not change is that online students of any age expect three key things in their college search process: expediency, authenticity, and personalization. Universities that can more effectively deliver to these needs—and be able to clearly articulate their value proposition—will find themselves at a competitive advantage for years to come.

*Charles Ramos, Vice President, Graduate and Online Solutions, RNL*

If the pandemic has taught us anything, students in grades 9-12 have a clear understanding of less than optimal online experiences. They are torn between an appreciation of the flexibility afforded by an online learning experience and the lack of quality experienced through their remote emergency learning time with teachers who were ill-prepared for distance education. This next generation of students will be intrigued by blended and online learning experiences that give them the flexibility they desire but will come to the online classroom with a clear understanding of a “bad experience” and will seek something better, something more. The onus will be on colleges and universities to create meaningful learning experiences that are appropriate for the development of the traditional audience. The emphasis should be on creating the most meaningful and engaging opportunities for the in-person experience, augmented by high-quality content and engagement using learning technologies.

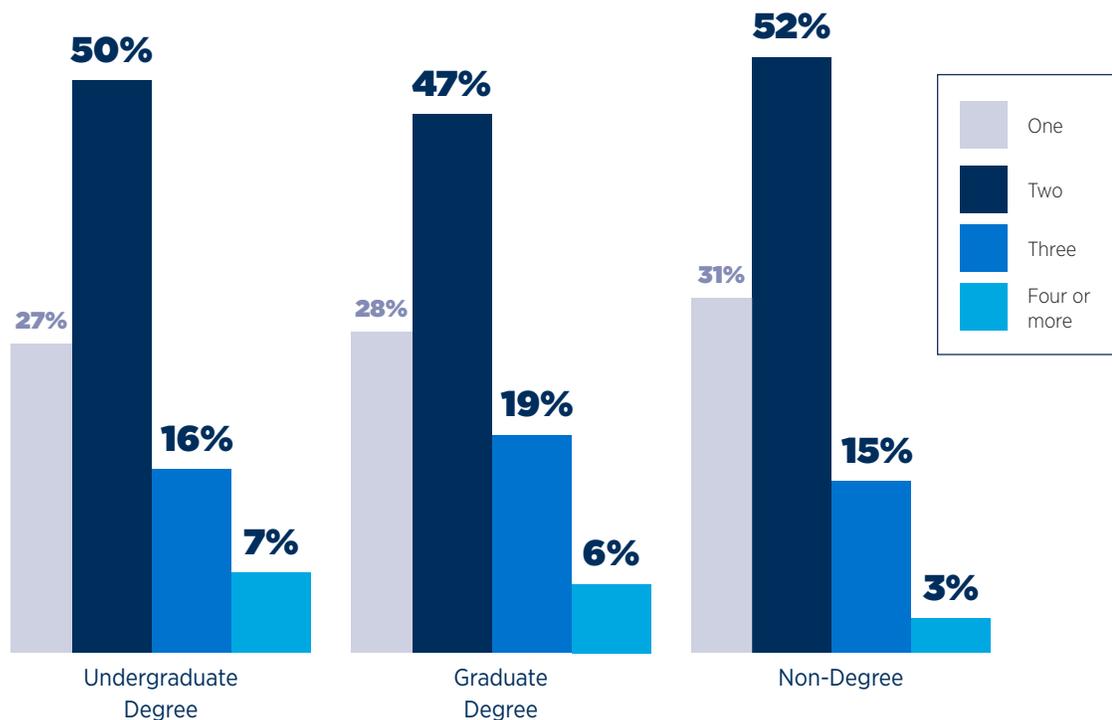
*Cherron R. Hoppes, Ed.D., RNL Chief Academic Officer, RNL*

**9 Online students demand personalized attention, want a speedy response, and are likely to enroll at the institutions that respond to their questions first.**

Competition for online students is stronger than ever, and the increased number of available programs affords online students more “choice” than at any time in history.

These students are taking advantage of that opportunity. While in past decades there may have only been one program with the flexibility, convenience, and content that met their needs, today there are dozens. Only one-quarter of online degree students considered a single program, while half inquired about two programs and another quarter inquired about three or more. There was little differentiation by age in these patterns—with the exception of online students over age 50 being twice as likely to only consider a single program.

**TABLE 30: NUMBER OF ONLINE PROGRAMS CONSIDERED**



The most important implication of this demonstration of increased competition is that institutions need to be sure that they do a better job than they may have in the past in meeting key expectations of online students. While at one point they may have been the only local option, or the only institution with a given program, today any institution is competing with dozens if not hundreds of other programs for a finite number of students. In what follows, we describe some key expectations at the beginning of the cultivation process after an initial inquiry.

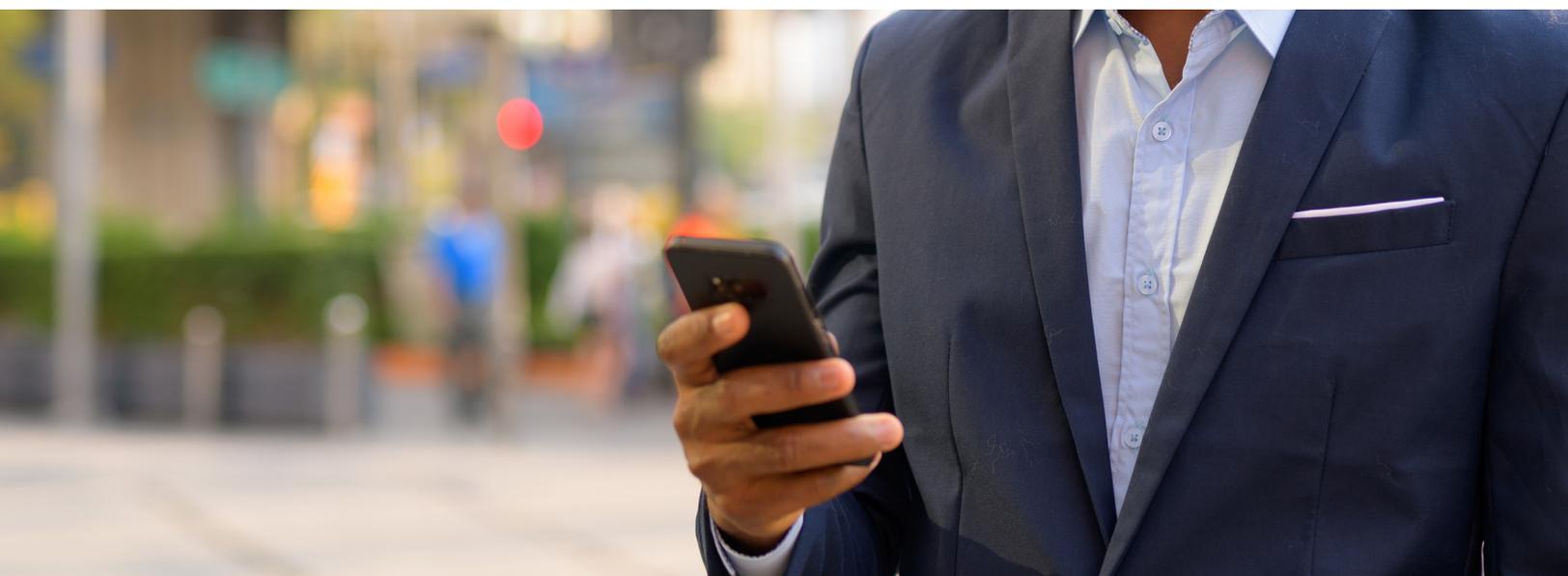
**First contact response times:** Nothing is more important than understanding the speed with which those who inquire about a program expect to hear back from that institution. Whether by (personalized) email, text message, phone, or social media platform, about one-quarter of online students expect a response within minutes. Another 20-30 percent will give an institution up to three hours, and about 25-30 percent will allow for a single business day. That means that institutions that take more than 24 hours to respond to a first inquiry are disappointing 75-80 percent of online students.

<b>TABLE 31: EXPECTED RESPONSE TIMES AFTER FIRST INQUIRY</b>	<b>UNDER-GRADUATE DEGREE</b>	<b>GRADUATE DEGREE</b>	<b>NON-DEGREE</b>
<b>Personalized email</b>			
Immediately	27%	19%	17%
Within 3 hours	21%	20%	20%
Within a day	29%	26%	33%
More than 1 day	23%	36%	30%
<b>Text message</b>			
Immediately	27%	24%	20%
Within 3 hours	25%	27%	35%
Within a day	25%	23%	25%
More than 1 day	23%	27%	21%
<b>Phone call</b>			
Immediately	29%	24%	25%
Within 3 hours	19%	20%	20%
Within a day	26%	26%	28%
More than 1 day	26%	31%	27%
<b>Digital or social media advertising</b>			
Immediately	24%	16%	13%
Within 3 hours	22%	24%	26%
Within a day	26%	25%	30%
More than 1 day	27%	36%	31%

**Acceptable and preferred communications channels:** We asked respondents a series of questions regarding their preferences for communications from (and with) programs/institutions of interest in order to help marketing and enrollment staff develop strategies that meet student expectations. Because institutions need to take a multichannel approach to communication, we began by asking about both the communication channels that were acceptable and those that are preferred for communication from the institution.

*Acceptable channels:* All of the channels we asked about were broadly acceptable to all types of online students. Non-personalized “form letter” email was the least acceptable with between 10 and 15 percent of respondents indicating that they did not want this type of communication from their programs of interest. When reviewing these data, findings were almost entirely consistent, with the exception of older online students who were even less likely to want non-personalized email (26 percent), text messages (23 percent), or communication through social media channels (48 percent).

TABLE 32: ACCEPTABLE COMMUNICATION STRATEGY	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Personalized email	95%	97%	95%
Non-personalized email	89%	89%	86%
Text message	92%	92%	85%
Phone call	89%	90%	90%
Material mailed to home	93%	93%	92%
Digital or social media channel	81%	81%	71%



*Preferred channels:* Personalized email is the preferred method of communication among prospective online students at all levels, with more than half of respondents having that preference. Text messaging has superseded phone calls as the next most preferred method of communication from programs/institutions of interest, while communication through a digital or social media channel was least attractive. Preferences were quite consistent across age brackets with two interesting divergences: the youngest online students indicate nearly twice as much preference for phone calls in comparison with overall trends and many other age brackets, while older online students have the lowest preference for phone calls (with just 9 percent preferring that channel).

<b>TABLE 33: PREFERRED METHOD OF CONTACT FROM INSTITUTIONS (BY DEGREE TYPE)</b>	<b>UNDER-GRADUATE DEGREE</b>	<b>GRADUATE DEGREE</b>	<b>NON-DEGREE</b>
<b>Personalized email</b>	53%	57%	53%
<b>Text message</b>	20%	15%	17%
<b>Phone call</b>	13%	13%	17%
<b>Material mailed to home</b>	7%	6%	7%
<b>Non-personalized email</b>	6%	7%	6%
<b>Digital or social media channel</b>	1%	3%	1%

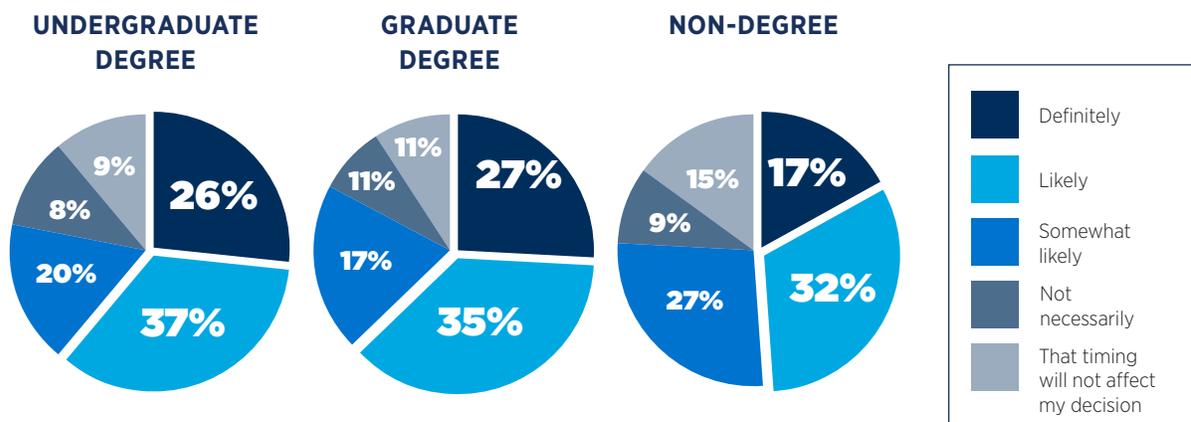
<b>TABLE 34: PREFERRED METHOD OF CONTACT FROM INSTITUTIONS (BY AGE)</b>	<b>UNDER 25</b>	<b>25-29</b>	<b>30-34</b>	<b>35-39</b>	<b>40-44</b>	<b>45-49</b>	<b>50+</b>
<b>Personalized email</b>	53%	56%	54%	53%	55%	64%	54%
<b>Text message</b>	20%	22%	17%	17%	14%	13%	16%
<b>Phone call</b>	20%	10%	15%	17%	15%	7%	9%
<b>Material mailed to home</b>	4%	4%	5%	5%	9%	9%	15%
<b>Non-personalized email</b>	2%	9%	6%	6%	6%	7%	5%
<b>Digital or social media channel</b>	2%	0%	4%	2%	2%	0%	0%

**Texting:** When is it appropriate for institutions to text prospective students? More than 40 percent think it is acceptable to be texted after an inquiry, while an additional 10 percent are happy to receive texts after submitting an inquiry. However, online students are far less likely to be in favor of receiving unsolicited texts from institutions that amount to marketing. They also do not want to be texted after they decide to enroll elsewhere.

TABLE 35: WHEN INSTITUTIONS SHOULD USE TEXTS TO COMMUNICATE	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Before I inquire or apply (an ad)	25%	23%	17%
After I submit an inquiry	46%	40%	45%
After I submit my application	54%	52%	54%
After I register for an event or reminders about events	38%	42%	38%
To convey an admission decision	35%	35%	44%
To confirm first term course registration	26%	23%	28%
After I decide to attend elsewhere	5%	6%	6%

**Enrolling at first institution to respond:** We ended this section of our survey by asking respondents how likely they are to enroll in the program that responds to their inquiry fastest (first). One-quarter of online students at both the undergraduate and graduate degree levels indicate that they will definitely enroll at the institution that responds to their inquiry first. Another third indicate that they are likely to do so. Only 10 percent indicate that this timing will play no role in their decision. Older online students were the only bracket with any significant divergence, and they were far more likely (24 percent) to say that this timing would have no impact on their decision making.

**TABLE 36: LIKELIHOOD OF ENROLLING IN PROGRAM THAT RESPONDS FIRST TO INQUIRY**



## Solution

Online students are savvy consumers, and their service expectations are high. To capture and hold their attention throughout the enrollment process, you'll need to be swift, leverage data efficiently, and plan for 24/7 responsiveness. The data above clearly show that the goal for customized responses should be within *minutes* and that all communications should demonstrate an understanding of the student's background, priorities, and motivations. While this may seem like an impossible task, there are some steps that institutions can take to get closer to meeting these expectations:

- **Know your audience.** Taking the time to truly understand who your students are will allow you to tailor your communications more effectively. While the data above provide a solid foundation in national norms and best practices, it's imperative that you start any enrollment and marketing plan with a keen understanding of who enrolls at your institution, why, and what research methods they're using.
- **Make your email communication plan engaging, timely, and relevant.** Email is still the preferred method of communication among all prospective online students. Make sure that your email communication plan is useful to their stage of the funnel and compelling. Consider adding video embedded messages as those also have much higher read rates. And remember: if it's not in the CRM, it didn't happen!
- **Consider personalized digital outreach with an inquiry.** This will help ensure the speedy, customized response students are expecting while also keeping staffing hours and FTEs manageable. Personalized videos and even text messages are great options.
- **Tighten up your admission timeline and streamline the process.** Consider this a spoiler alert for our next challenge: the "need for speed" doesn't stop once you have a complete application.

*Dani Rollins, Vice President, Graduate and Online Solutions, RNL*

## 10 Online students expect to be admitted quickly and will enroll where they are admitted first.

The final piece of the puzzle of success in the online market also focuses on the issue of speed. As with so many things that have been presented in this report, one finding builds upon other findings, and a gap in one area can derail success and challenging work in other areas. In that regard, the best marketing, the best efforts at timely response to inquiries and other contacts during the cultivation process can be undone if online programs take too long to admit students.

**Number of applications:** The importance of meeting the expectations that we outline below are accentuated by the fact that today's online students are applying to more institutions than ever before. One-third of either undergraduate degree or graduate degree students apply to one program, while almost half apply to two, and 20 percent apply to three or more. Data are remarkably consistent across five-year age brackets, with the only significant divergence being that older online students are almost twice as likely (59 percent) to apply to a single online program.

TABLE 37: NUMBER OF ONLINE PROGRAMS APPLIED TO	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
One	33%	36%	48%
Two	46%	43%	35%
Three	15%	15%	14%
Four or more	6%	6%	4%

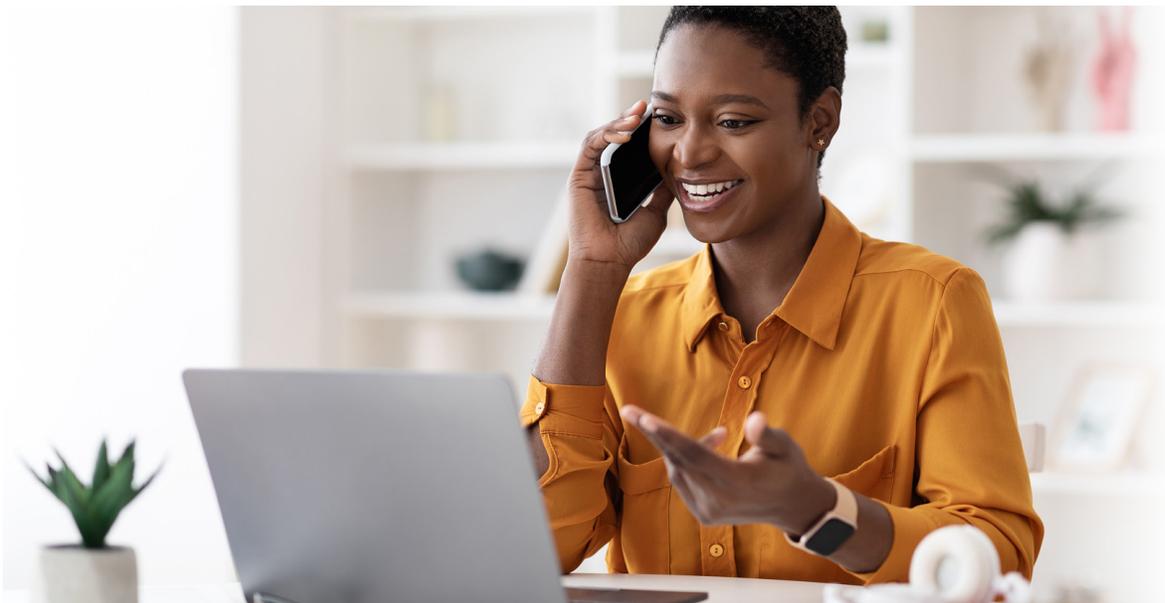
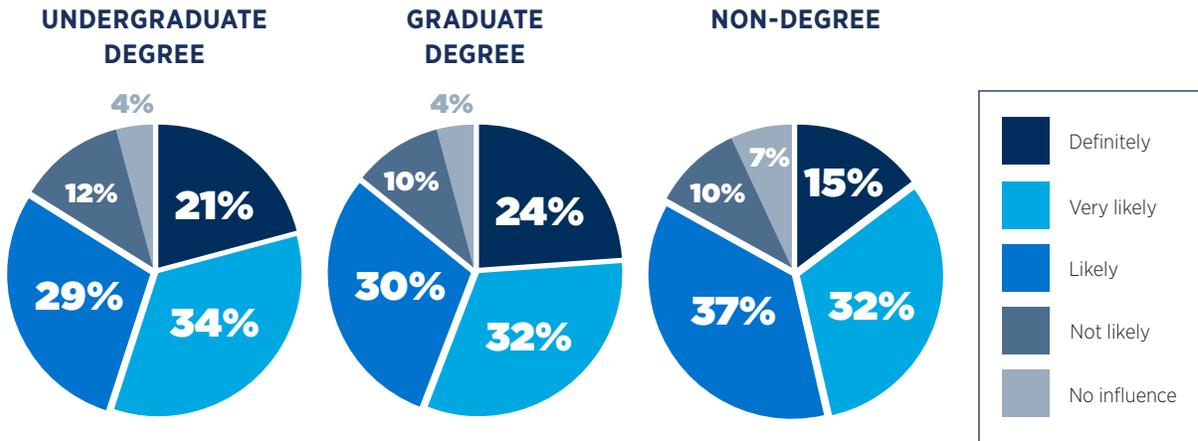
**Expected notification of admission:** More than 70 percent of all students expect to be notified of an admission decision within one week of submitting their application (or from the posted deadline for program that have an admissions deadline). Perhaps even more of a challenge for some institutions is that more than 40 percent of all students expect an admissions decision within three days. Data are remarkably consistent across five-year age brackets with the single exception that even more of the youngest online students will be disappointed by admissions decisions that take more than 14 days.

TABLE 38: EXPECTED TIME TO RECEIVE NOTIFICATION OF ADMISSION	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
Within 24 hours	11%	15%	8%
1-3 days	34%	29%	32%
4-7 days	30%	27%	31%
7-14 days	18%	19%	20%
14-21 days	5%	7%	6%
Longer than 21 days	2%	3%	3%

Why is this so important? We closed our survey by asking respondents how likely they would be to enroll in the program that admits them first. We already know that more than half are either likely or will definitely enroll in the program that responds to their inquiry first (as an expression of the importance they put on the type of timely customer service they get from any other provider they interact with), and so it is with admissions decisions also.

More than 80 percent of all students are at least likely to enroll in the program that admits them first. Within those numbers, 21 percent of undergraduate students, 24 percent of graduate students, and 15 percent of non-degree students indicate that they will definitely enroll in the program that admits them first. Imagine if you could guarantee that 20 percent of your applicants will enroll because you are beating all competitors on the admissions timeline? What would that be worth?

**TABLE 39: LIKELIHOOD OF ENROLLING IN ONLINE PROGRAM THAT OFFERS ADMISSION FIRST**





## Solution

These data likely do not surprise you. We instinctively know as enrollment professionals that students often engage and respond on their own terms and expect a personalized and speedy response from the business and sites they interact with each day. They expect institutions to have that same type of intelligence and nimbleness.

Speed and customer service are additional commonalities shared by these platforms. The prospective student today (the median age of which is 31) has come to expect instantaneous response to questions and hassle-free returns. While this may not seem to have direct application to higher education, when you consider the expected “wait time” to getting notification of acceptance, you begin to see that the prospective student may see less differentiation than you do.

Although not all campuses have access to the algorithms of large tech companies, most have world-class CRM systems that can aid them as they seek to respond in agile and quick ways to the expectations of students.

A few practical takeaways for those with the difficult task of meeting these expectations:

- When was the last time you conducted an internal audit of your processes?
- How quickly are you able to respond to inquiries? How does that response time change on nights and weekends? What modalities are you utilizing? How do they compare to the expectations of prospective students?
- How quickly are you able to admit students? How does your reality compare to the expectations of students?

Now that you're armed with data, what changes can you make to better align with the expectations of your prospective students?

*Aaron Mahl, Vice President, Graduate and Online Solutions, RNL*

## WHAT ARE YOUR BEST SOLUTIONS FOR OPTIMIZING ONLINE ENROLLMENT?

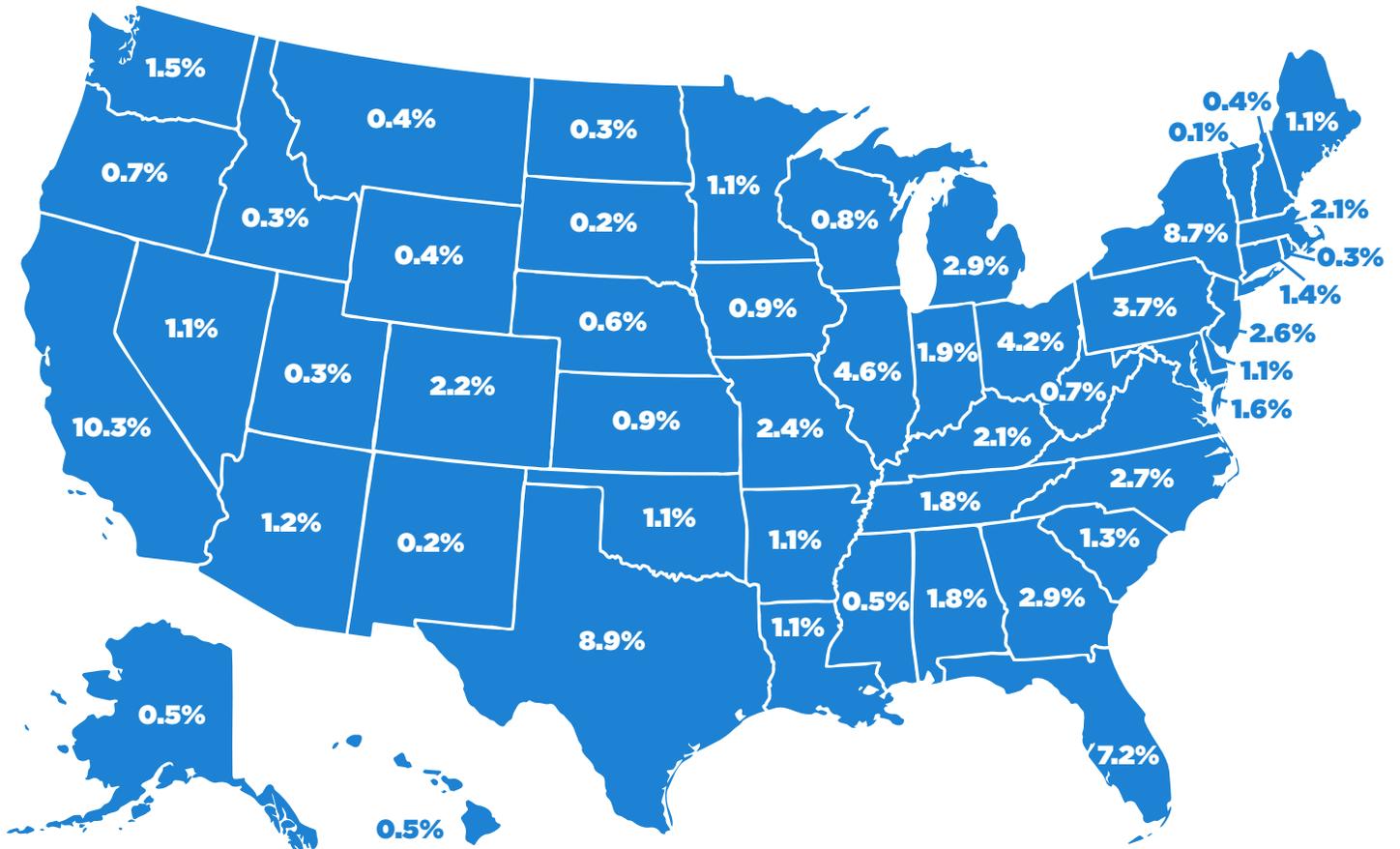
Our experts can help you engage online students and move the ones who are a best fit for your program quickly from inquiry to enrollment. We also have sophisticated solutions for behavioral modeling, program assessment, digital advertising, and other key pieces of a modern enrollment program.

Contact us for a complimentary consultation at [RNL.com/OnlineEnrollment](https://www.rnl.com/OnlineEnrollment).

## METHODOLOGY:

The survey that underpins this report was administered by electronic survey in February 2022. The survey was completed by 1,689 individuals who met the criteria of “planning to enroll in a credit-bearing, fully online degree or certificate programs (undergraduate or graduate level) within the next 12 months.” Respondents were offered a token incentive for their participation.

Proportions of respondents by state are as follows:



# DEMOGRAPHICS OF SAMPLE

GENDER IDENTITY	ALL RESPONDENTS
Female	47%
Male	51%
Non-binary/gender fluid	1%
Prefer not to respond	1%

AGE	ALL RESPONDENTS
Under 21	10%
22-24	13%
25-29	17%
30-34	16%
35-39	14%
40-44	10%
45-49	5%
50-55	5%
55+	9%

RACE/ETHNICITY	ALL RESPONDENTS
Alaska Native	1%
American Indian	3%
Asian	4%
Black/African American	11%
Hispanic or Latino/a/x (including Puerto Rican)	9%
Middle Eastern or North African	0%
Native Hawaiian or Pacific Islander	1%
White	79%
Multi-racial (specify)	1%
Prefer to self-describe	0%

## ABOUT THE RNL CONTRIBUTORS



**Scott Jeffe:** Scott Jeffe is the principal researcher for this report. He is vice president of graduate and online research at RNL. Over more than 20 years, Scott has worked with almost 300 institutions in 40+ states to apply market data to strategic decision making in relation to graduate, adult undergraduate, and online programs. With this focus on profiling the demands and preferences of professional graduate students, adult undergraduate students, online students, etc., Scott has developed an understanding of how institutions can align with student demand while upholding institutional mission and values.



**Cherron Hoppes, EdD:** Dr. Cherron Hoppes is a veteran higher education professional with expertise in academic administration, including learning outcomes assessment and curriculum design. Her career experiences have been diverse: working for a mid-sized public institution and small, private institutions to support traditional undergraduate students as well as post-traditional working adults seeking degree completion or graduate degrees. Over her rich career, Cherron served as the chief academic officer for Helix Education for over six years. Prior to that, as the dean of undergraduate programs for the Ageno School of Business at Golden Gate University. She holds a doctorate in education, focused on higher education administration, from the University of Alabama. She is currently the CAO for RNL.



**Amy Jauman, EdD:** Amy Jauman is an author, international speaker, professor, and passionate higher education leader. She currently serves as director of university partnerships at RNL, working with graduate and online higher education leaders to connect them with the strategy, platforms, and services that grow enrollment. Previously, she was the program director for multiple graduate programs at Saint Mary's University of Minnesota. She has also supported organizations in Minnesota through volunteer service with the Women Entrepreneurs of Minnesota, the Children's Hospital Association, the Association for Talent Development (ATD), and the Twin Cities chapter of SHRM.



**Aaron Mahl, PhD:** Dr. Aaron Mahl joined RNL in 2013 delivering enrollment management consulting and strategic financial aid solutions to RNL partners. Aaron has worked with dozens of campuses to optimize their enrollment practices and financial aid policies. Before joining RNL, Aaron served as chief admissions officer at Trinity International University (IL) where he championed a collaborative and data-driven approach to student recruitment. Aaron's work at Trinity included developing and executing a strategic recruitment plan and revolutionizing the campus visit and event strategy. Aaron currently consults and serves RNL's graduate and online partners throughout the Midwest.



**Charles Ramos:** Charles Ramos offers 25 years of experience as an enrollment professional and consultant. He has affected positive change that has equated to increased enrollment and sustainable revenue growth in the undergraduate, graduate, online, and non-traditional markets for over 100 institutions across the United States and Canada. He started his career at Saint Louis University where he began building his enrollment management expertise. Through time spent at RNL and ACT, Inc., he has been deeply immersed in consulting in the areas of recruitment, retention, and strategic enrollment management.



**Dani Rollins, EdD:** Dr. Dani Rollins brings a depth of experience and transformational leadership practices from a variety of institutions to bear on her work with RNL. Prior to joining RNL, Dani served in senior leadership roles at a variety of institutions, including Reed College (OR), Northern Illinois University, University of Wisconsin-Milwaukee and, most recently, at the University of Arizona. Under her leadership, the university brought in the most diverse incoming class in the institution's history and set a new record for the number of admission applications received.



**Holly Tapper:** Holly Tapper offers a strong background as a university administrator leading successful graduate programs, with extensive experience in online learning for nearly 15 years. Prior to coming to RNL, she was director of online operations at St. Mary's University of Minnesota, where she had a track record of success. Under her leadership more than 20 online programs brought in \$15M/year. Previously, Holly also served as dean of graduate programs at Globe University/Minnesota School of Business, overseeing programs across 30 campuses that generated \$14M/year.

## ABOUT THE RESEARCH SPONSORS



RNL is the leading provider of higher education enrollment, student success, and fundraising solutions. The firm serves more than 1,900 colleges and universities through data-driven solutions focused on the entire lifecycle of enrollment and fundraising, assuring students find the right program, graduate on time, secure their first job in their chosen field, and give back to support the next generation. With a deep knowledge of the industry, RNL provides institutions the ability to scale their efforts by tapping into a community of support and resources.

Visit [RuffaloNL.com](https://RuffaloNL.com)



PLEXUSS is a mission-driven digital platform impacting how prospective students and post-secondary institutions connect. Since 2015, the PLEXUSS Global Student Network™ has grown to over 7 million student users and nearly 18,000 post-secondary institutions worldwide, which provided an excellent source of survey respondents. By leveraging proprietary AI technology, PLEXUSS engages students over longer periods, getting to know each student's individual needs and goals.

Visit [Plexuss.com/solutions](https://Plexuss.com/solutions)

## WHAT ARE YOUR BEST STRATEGIES FOR RECRUITING AND ENROLLING ONLINE STUDENTS?

RNL works with graduate programs around the country to engage and enroll students. Find out how we can help your institution with:

- Enrollment strategy
- Market insights
- Teaching and learning
- Lead generation
- Conversion and recruitment
- Student retention and success

Learn more and ask for a free consultation at [RNL.com/OnlineEnrollment](https://RNL.com/OnlineEnrollment).



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Email [ContactUs@RuffaloNL.com](mailto:ContactUs@RuffaloNL.com)  
Call **800.876.1117**

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