



2024 Online Student Recruitment Report

10 Critical Questions and Answers to
Build Student-Centered Online Programs





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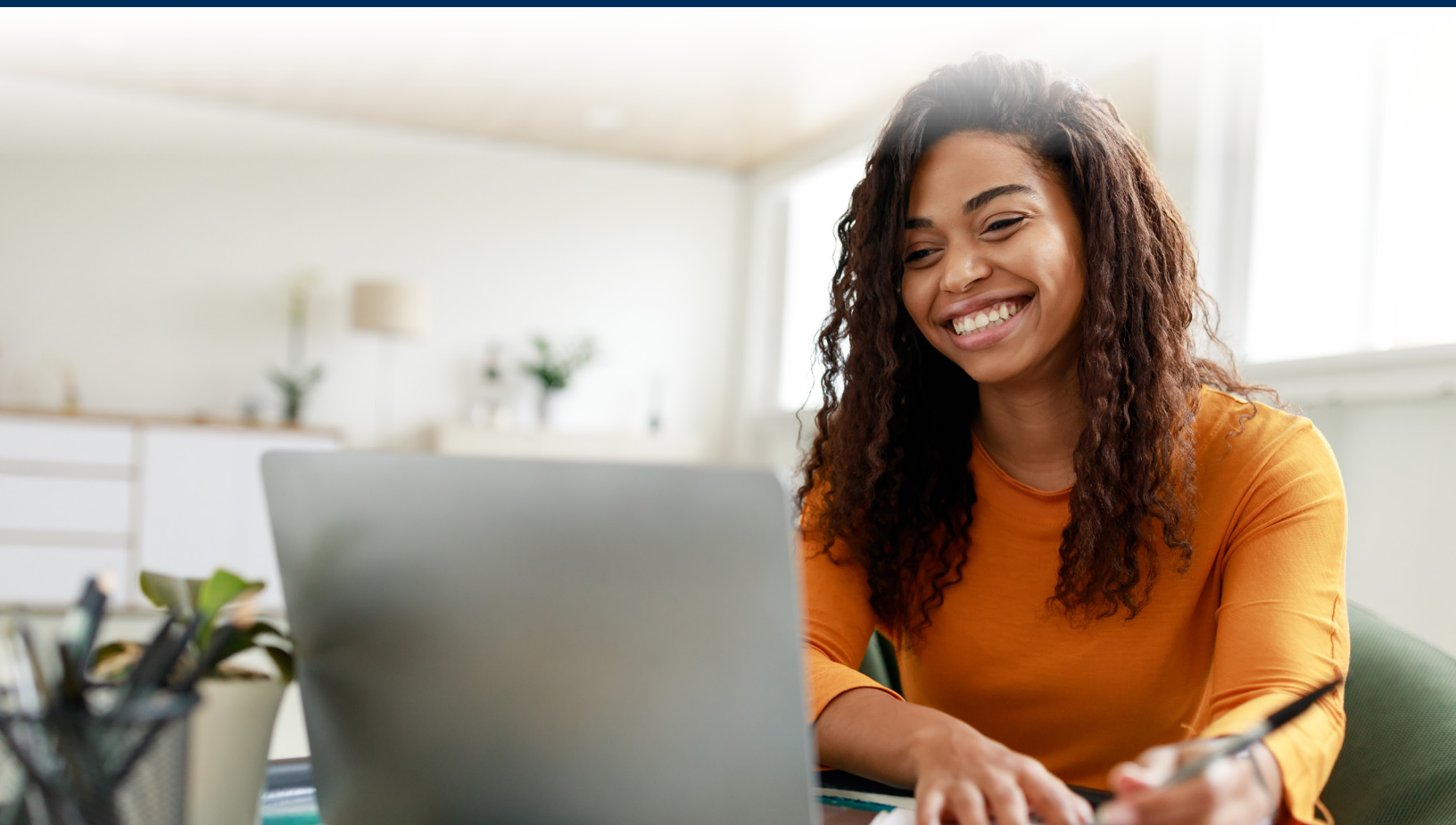


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Introduction

The *2024 Online Student Recruitment Report* represents RNL's second national study of the expectations and preferences of online students, and our fourth report that focuses on the graduate or online student audiences that continue to report growth in the American higher education market.

RNL knows that understanding what students expect during the enrollment process, how they search for programs, how they want their courses and programs structured, why they choose the program in which they enroll, how they are using AI, and how you can apply AI to better meet their expectations is critical to enrollment growth.

Why? Because the target population has firmly transitioned from “GenX/Millennial” to “Millennial/GenZ.” Both Millennials and GenZ have grown up experiencing customized and personalized processes. When combined with the level of “choice” available to them, it is the online programs that most closely align with their expectations that will grow. When not sacrificing academic integrity, these are truly student-centered programs.

Over the last decade, RNL has helped hundreds of institutions bring online programs from the periphery to the center of enrollment health, and our work is supported by the research included in this report as well as our previous national studies.

The report is organized around 10 questions that are critical to successful online enrollment growth, and it also builds on what we uncovered in our 2022 report. You will get to know today's online students better by learning more about:

1. How are online students using and applying AI?
2. What motivates and concerns online learners?
3. How should institutions position their online programs in a crowded market?
4. What are the hallmarks of online programs in which students will enroll?
5. How do online students want their courses configured?
6. How do online students search for and research programs of interest?
7. What do online students expect during the enrollment process?
8. What drives enrollment decisions?
9. What prevents and slows online students from enrolling?
10. What are the demographics of online learners today?

The data presented in this report is presented by degree level. “Undergraduate” comprises associate (19 percent) and bachelor's (40 percent), while “graduate” comprises master's (37 percent) and doctoral (6 percent). Credit-bearing, non-degree students were not included this year but can be found in our 2022 study.

BY THE NUMBERS:

Total Respondents: 1,556

Degree Level: Undergraduate 59% | Graduate 41%

Enrollment Status: Prospective 71% | Enrolled 29%

Generations: Gen Z 29% | Millennial 48% | Gen X+ 23%

Look for deep-dive summary reports on each of these characteristics later this year.

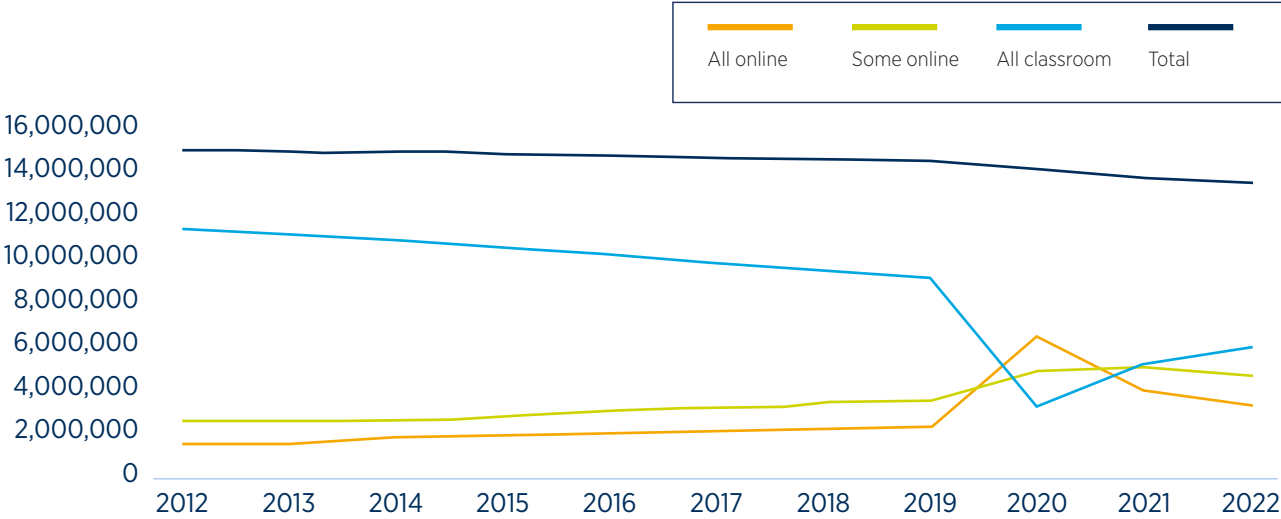
Online Setting: Is Online Education In Decline?

When the U.S. Department of Education released its most recent IPEDS fall enrollment snapshot data there were several important findings, which included:

- 1. Undergraduate enrollment continued its decline but slowed to -2 percent (see Figure 1)
- 2. Graduate enrollment contracted by 1 percent, the first time in a decade (Figure 2)
- 3. Students opting to enroll in all online or some online courses also contracted (Figures 1 and 2)

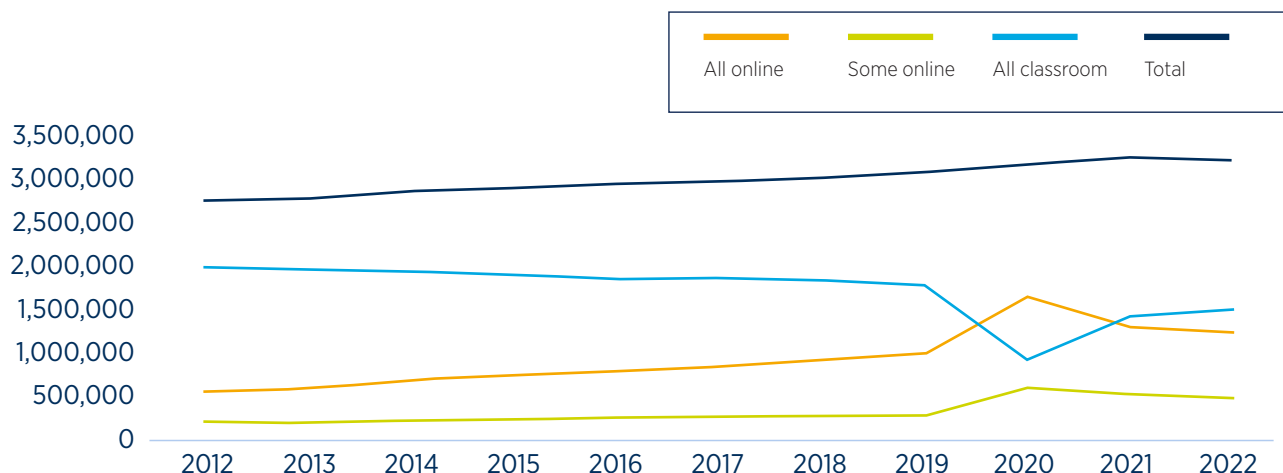
While these are the most frequently cited data, the most accurate portrayal of online enrollment is reflected in the 12-month unduplicated “headcount” data, which accounts for the millions of students who enroll first after the fall semester of the year. In 2021-2022 this accounted for nearly 6 million additional students, all but 200,000 of whom were enrolled in either all online or some online courses.

Figure 1: Undergraduate Enrollment by Student Format Choice



Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

Figure 2: Graduate Enrollment for Student Format Choice



Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

What does the reported online contraction mean for institutions that have pivoted quickly to expand their online offerings? Is a crisis at hand?

There is no denying that the number of students opting to enroll in all online or some online courses contracted for the second year in a row. This is because, in 2020, millions of classroom students were forced into online, remote, or hybrid study. While it is highly unlikely that format preferences will return to pre-pandemic patterns, it is not alarming that three years out from the pandemic, some students are returning to classroom study. In what follows, we use data to understand what is going on and what it means for institutional planning and execution.

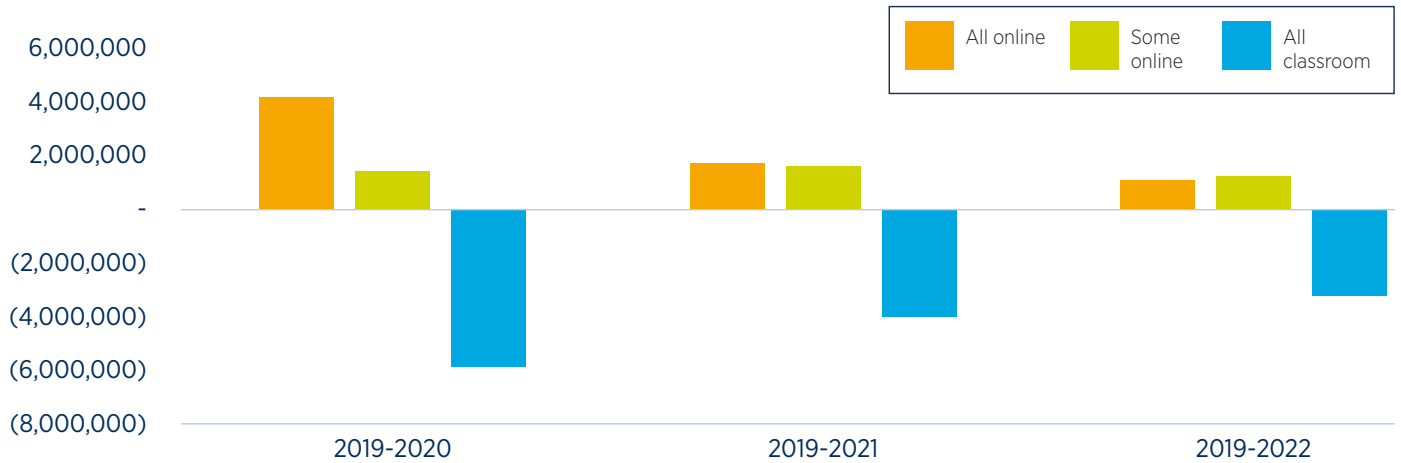
The real state of online education

By using these same IPEDS data but comparing each post-pandemic year with the last pre-pandemic year (2019), a more accurate understanding of the position and health of online enrollment can be seen. This avoids the possible misinterpretation of year-over-year data that may appear to portray online enrollment as in peril. This methodology is used in Figures 3 and 4.

The topline finding in these data is that millions more students are continuing to choose fully online and some online study.

Undergraduate: In 2022, 2.2 million more undergraduate students decided to enroll in all online or some online courses compared to 2019, with those opting for some online outpacing all online. Compare this with 3.2 million fewer who opted to enroll in all classroom study. This does not present a strong case for returning the focus to classroom programs while presenting a clear need to prioritize the offering of online courses within classroom programs and then fully online programs.

Figure 3: Undergraduate Pre- and Post-Pandemic Enrollment Growth by Format

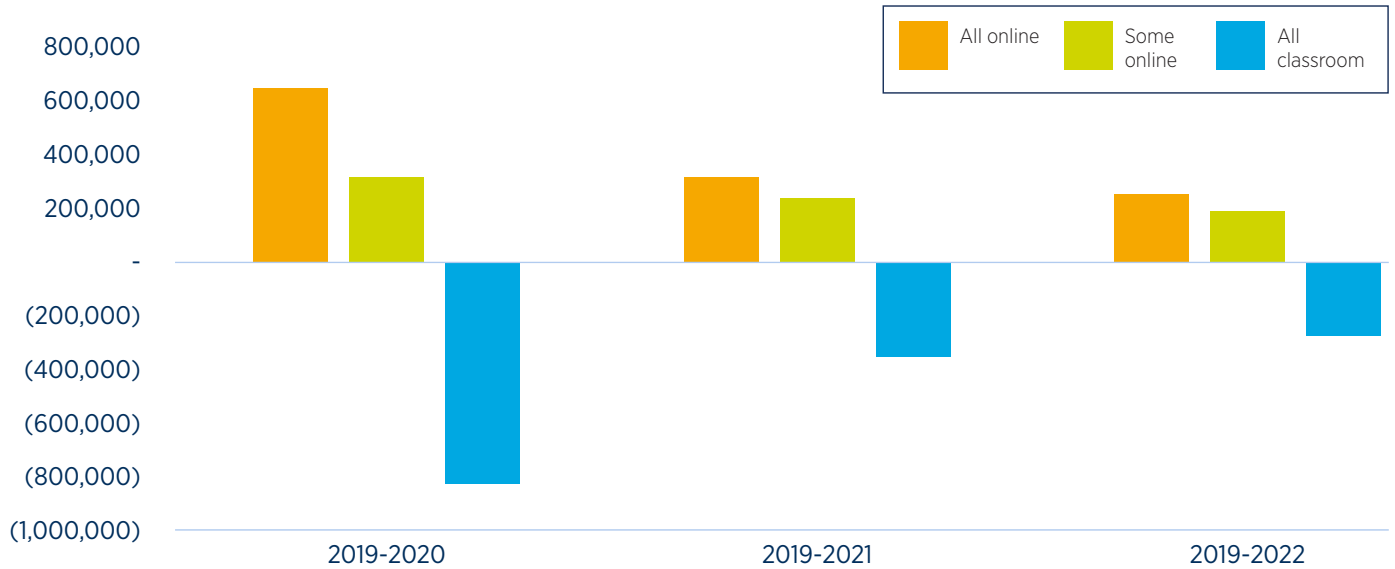


Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

It is also worth considering that the IPEDS 12-month academic year data mentioned above—both pre- and post-pandemic—has indicated that more than 5 million additional undergraduates enroll at other times of the year and all but 200,000 select all or some online courses.

Graduate: In 2022 more than 424,000 more graduate students decided to enroll in all online or some online courses than in 2019—with those opting for *all online* significantly outpacing some online. Compare this with more than 284,000 fewer who opted to enroll in all-classroom study. Again, this does not present a strong case for returning the focus to classroom programs. Institutions must continue to prioritize the offering of fully online programs and online courses within classroom programs.

Figure 4: Graduate Pre- and Post-Pandemic Enrollment Growth by Format



Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

Similar to undergraduate trends, the IPEDS 12-month academic year data mentioned above indicates that more than 812,000 additional graduates enroll at other times of the year and every single one of them selects all online or some online courses.

Report format

In what follows, you will see data presented around the 10 critical questions addressed in this report. Each section ends with an “Implications for Institutions” summary written by RNL enrollment experts who work with numerous client institutions each year. Nearly all of these experts have also spent many years leading institutional enrollment, marketing, or academic operations as deans, vice presidents, and/or other titles. As the title implies, they were asked to write a comment on the selected tables from the point of view of “What would you say to a client or colleague with whom you were talking about these data?”

Throughout this report, we present data by degree level. Look for subsequent reports that will present data by student generation and by prospective versus enrolled student status. Note that all data are organized by the percentage of **all respondents** selecting a question’s option(s).

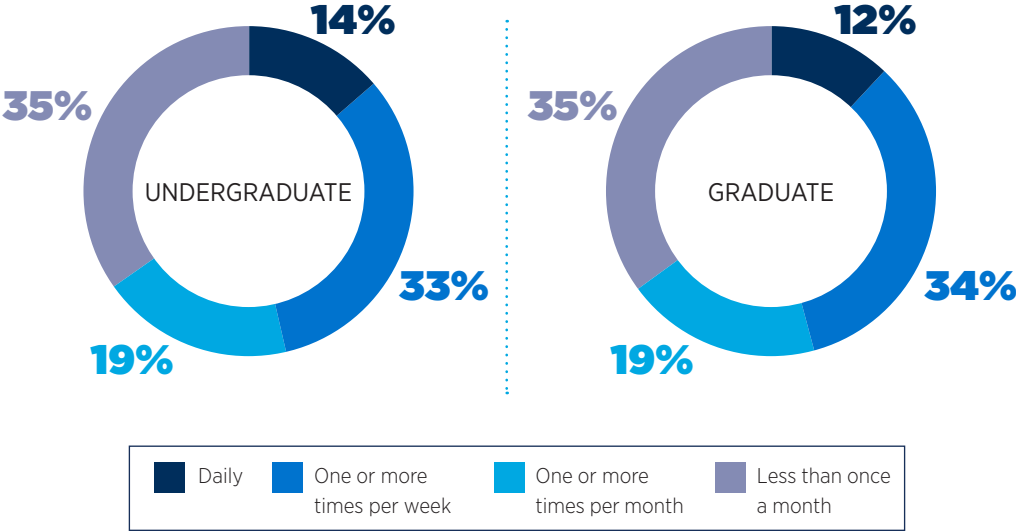
Ten Questions You Need to Understand

1. How are online students using and applying artificial intelligence?

Strategically incorporating artificial intelligence (AI) into marketing, recruitment, and teaching efforts at educational institutions has become increasingly important over the last year. This shift is due to substantial advances in AI tech and a rise in its use among the general public, especially students. Understanding the extent to which online students are using AI, the regularity of doing so, and how they use AI in their online study helps institutions assess the direction and extent of their efforts in AI. With this in mind, we asked prospective and enrolled online students a series of questions related to their use of AI in their online education experience.

This section of the report presents data by both degree level and student generation. A more comprehensive report on the student generations will be published later in the year.

Figure 5: How often do you use an AI platform like ChatGPT, Google Gemini, etc.?



FREQUENCY OF USE OF AN AI PLATFORM	GEN Z	MILLENNIAL	GEN X+
Daily	16%	14%	10%
One or more times per week	39%	34%	25%
One or more times per month	19%	20%	14%
Less than once a month	27%	32%	52%

Figure 6: If offered as part of your online program, what AI-powered technology would you be likely to use?

PREFERRED AI TECHNOLOGY IN ONLINE CLASSES	UNDERGRADUATE	GRADUATE
Virtual research assistant: Tools that may complete a variety of research-related tasks for students and researchers, including discovering academic sources, summarizing articles, analyzing citation patterns, organizing literature reviews, and managing citations.	50%	50%
Virtual writing assistant: AI-powered writing platforms or tools that integrate within existing word processing software. Goes beyond spell-check or grammar tools by summarizing writing, suggesting “smart” revisions, and adjusting writing style to and tone for different audiences (academic, general public, etc.).	43%	44%
Personalized study coach: Platforms or tools that provide custom study plans, assist with effective note-taking, and offer adaptive knowledge checks with feedback.	42%	42%
On-demand academic advising: Chatbots or other technologies implemented by institutions to provide first-line academic advising support.	35%	41%
Plagiarism detector/corrector: Tools that detect and alert students, instructors, or other users to potential plagiarism and provide custom guidance for correcting the issues.	31%	31%
None of the above	12%	13%

PREFERRED AI TECHNOLOGY IN ONLINE CLASSES	GEN Z	MILLENNIAL	GEN X+
Virtual research assistant	47%	51%	52%
Virtual writing assistant	47%	45%	37%
Personalized study coach	45%	43%	36%
On-demand academic advising	38%	39%	33%
Plagiarism detector/corrector	41%	29%	23%
None of the above	7%	11%	22%

Figure 7: Did you use an AI-driven chatbot during your search for an online program?

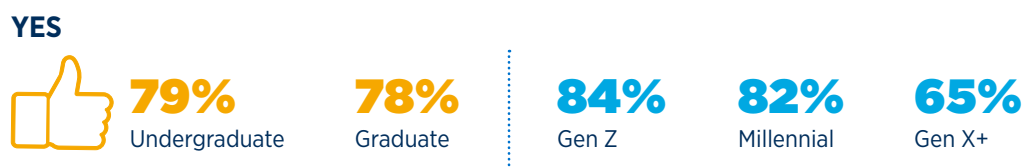


Figure 8: How effective did you find chatbots in providing the information you needed during your search?

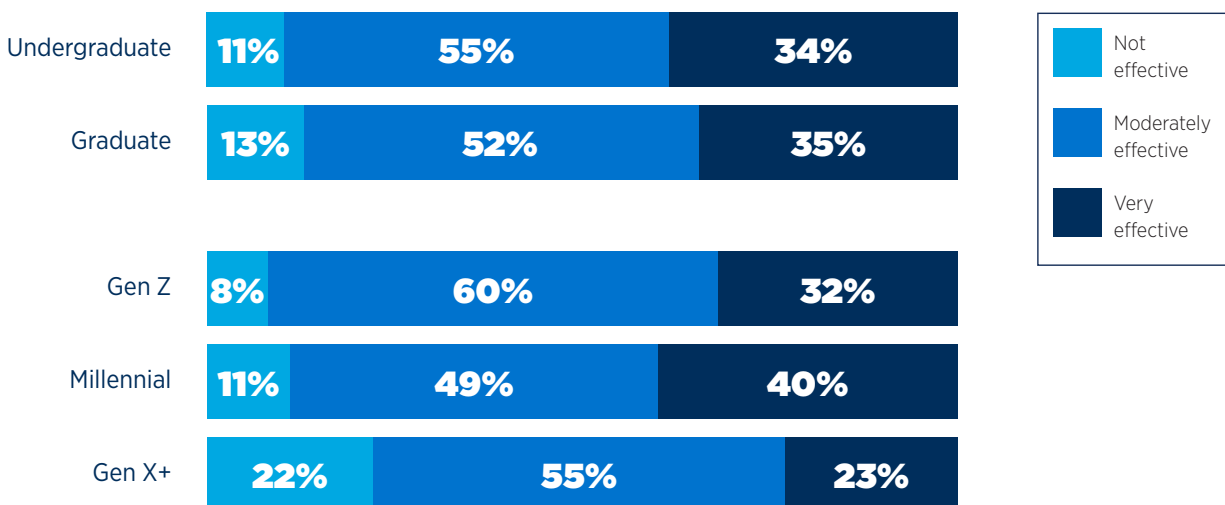
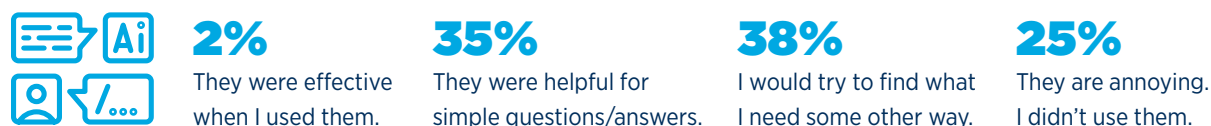


Figure 9 shows a similar question asked in the RNL 2022 *Online Student Recruitment Report*, with respondents demonstrating considerably less enthusiasm for AI-driven chatbots just two years ago.

Figure 9: What is your opinion of AI-driven chatbots on online program pages?



Implications for institutions

Online students across all age groups are enthusiastic about incorporating AI into their academic endeavors, whether it's aiding in their studies, research, or even navigating the complexities of finding the right graduate program. With the increasing comfort level with AI, particularly among Gen Z, the trajectory of AI usage is poised for rapid growth.

Additionally, most students, particularly from the Gen Z and millennial cohorts, have used chatbots during their search for online programs. While the effectiveness of chatbots varies, with a considerable percentage finding them moderately to very effective, there is a consensus among respondents that they can serve as helpful tools for obtaining quick answers.

Instead of hitting the brakes on AI, universities need to step up their game. It's all about guiding students in using AI responsibly, like setting up guardrails on a highway rather than closing it down.

The bottom line is that universities need to hustle to integrate AI into their online education scene. Make it accessible, give students guidance on how to use it well, and watch the learning landscape transform.

—Roger Lee, Senior Vice President of AI Success & Sustainability, RNL

2. What motivates and concerns online learners?

When offered a set of choices that differentiate career-related and personal reasons, most online students indicate that bettering their career trajectory is the primary driver. No single motivation dominates enrollment in a specifically online program, but the two most common reasons—the ability to learn at their own pace and scheduling flexibility—make it clear that while there are many aspects to online study, flexibility and convenience drive decision making.

Engagement with instructors, technical issues, and the quality of instruction are the leading areas of concern, but it is noteworthy that no single issue concerned more than one-third of online students. This speaks to their ever-increasing comfort with online learning.

Institutions should use the data on motivations and concerns to develop marketing messaging, cultivation strategy, and program curricula. Headlining messaging with specific information about career preparation and addressing the flexibility of the online format while also explaining how students engage with their instructors (and classmates) should all be made explicit. Speaking to the measures of quality of the experience—particularly through video presenting current and recent students—and how students' technological challenges are addressed are all best practices for positioning online programs today.

Figure 10: What was your primary motivation to earn a degree?

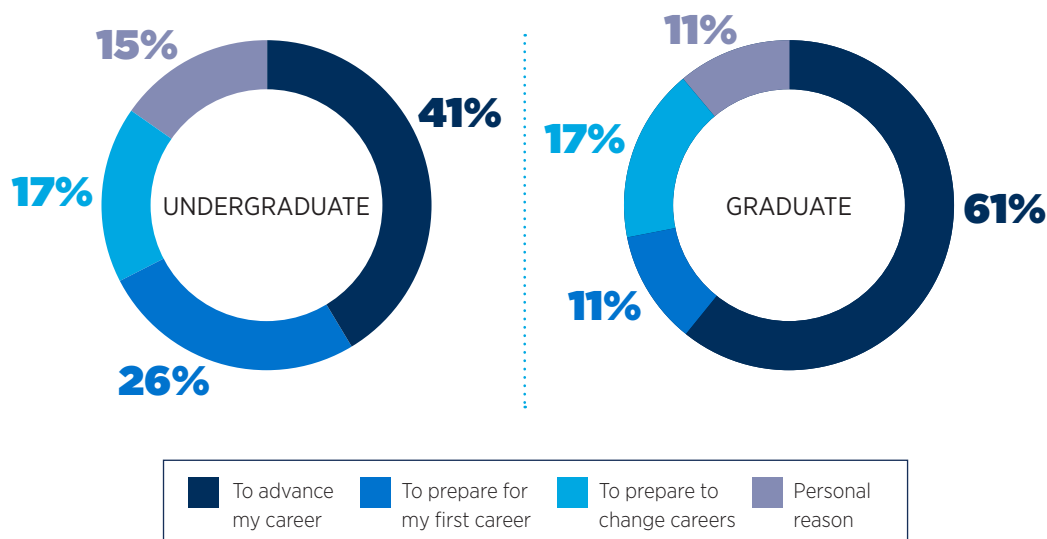
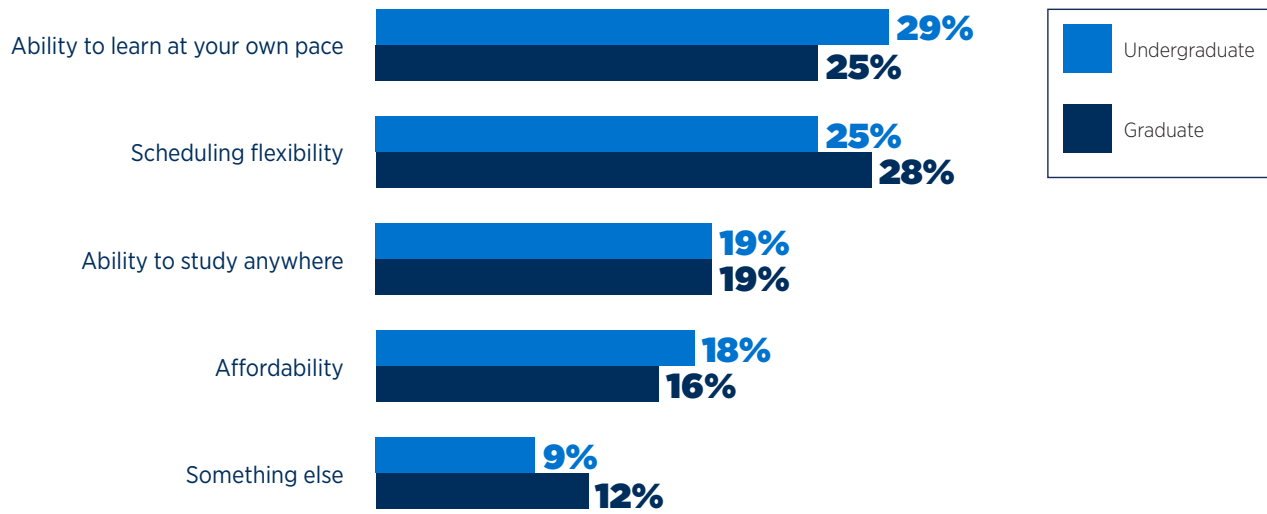


Figure 11: After deciding you wanted to earn a degree, what was your primary motivation for considering/enrolling in an online program?



Comments on motivations to enroll in an online program

Undergraduate students: When asked to expand on their reasons for selecting an online program, undergraduate respondent comments were characterized by the following themes:

- **Flexibility and convenience:** Undergraduates are drawn to online study because it offers flexibility, including the ability to make their schedules, study from anywhere, and fit education into their existing commitments like work. This aspect is highlighted by comments such as “a great option for those who don’t want to/can’t attend in person,” “ability to make own schedule,” and “able to work with my schedule.”
- **Personal challenge:** Some students view online study as a personal challenge, indicating a desire to test or expand their personal boundaries and capabilities.
- **Affordability:** Cost is a major factor for undergraduates considering online education. Responses mention reasons related to affordability multiple times, suggesting that online programs are perceived as more financially accessible or offer better value for some students.
- **Access and convenience:** The ability to do homework and research online, as well as the convenience of studying from home, are cited as significant advantages. This points to the importance of accessibility in education for undergraduates.
- **Work and study:** The capacity to work simultaneously while pursuing a degree is crucial for many students. Comments like “able to work as well” and “allows me to study anywhere and at any time” underline the importance of being able to balance education with employment.

Why did they decide to enroll in an undergraduate online program?

“I was close to completing my degree in person but had stopped when other things in life came up. I am now a father and want to finish, and online study will be a great way to do so.”

“I am disabled, so online study is much easier for me than having to go from classroom to classroom.”

“I considered online study after Covid hit. I wanted to go to college, but there was nothing affordable around me. Online learning has allowed me to make my own schedule and is affordable.”

Graduate students: When asked to expand on their reasons for selecting an online program, graduate-level respondent comments were characterized by the following themes:

- **Flexibility and convenience:** Many graduate students mentioned the need for flexibility due to working full-time jobs, busy schedules, and other commitments, while others highlighted the convenience of online programs, allowing them to study from anywhere and at any time.
- **Cost:** Affordability was the next most significant factor for many graduate students, with online programs often being more cost-effective compared to traditional on-campus options.
- **Pacing/Parenting responsibilities:** The ability to learn at their own pace was mentioned by several graduate students as a benefit of online study. Some of these graduate students specifically mentioned their parenting responsibilities, which need to balance childcare responsibilities with their educational pursuits.
- **Comfortability and safety:** Some graduate students mentioned the comfort of studying from home, particularly for those with social anxiety or transportation issues, while others mentioned concerns about health and safety, particularly in light of events like the COVID-19 pandemic, influencing them to pursue online study.
- **Career advancement:** Many students saw online education as a way to advance their careers or transition to new fields.
- **Accessibility:** Some students mentioned that online programs provide access to education that may not be available locally.

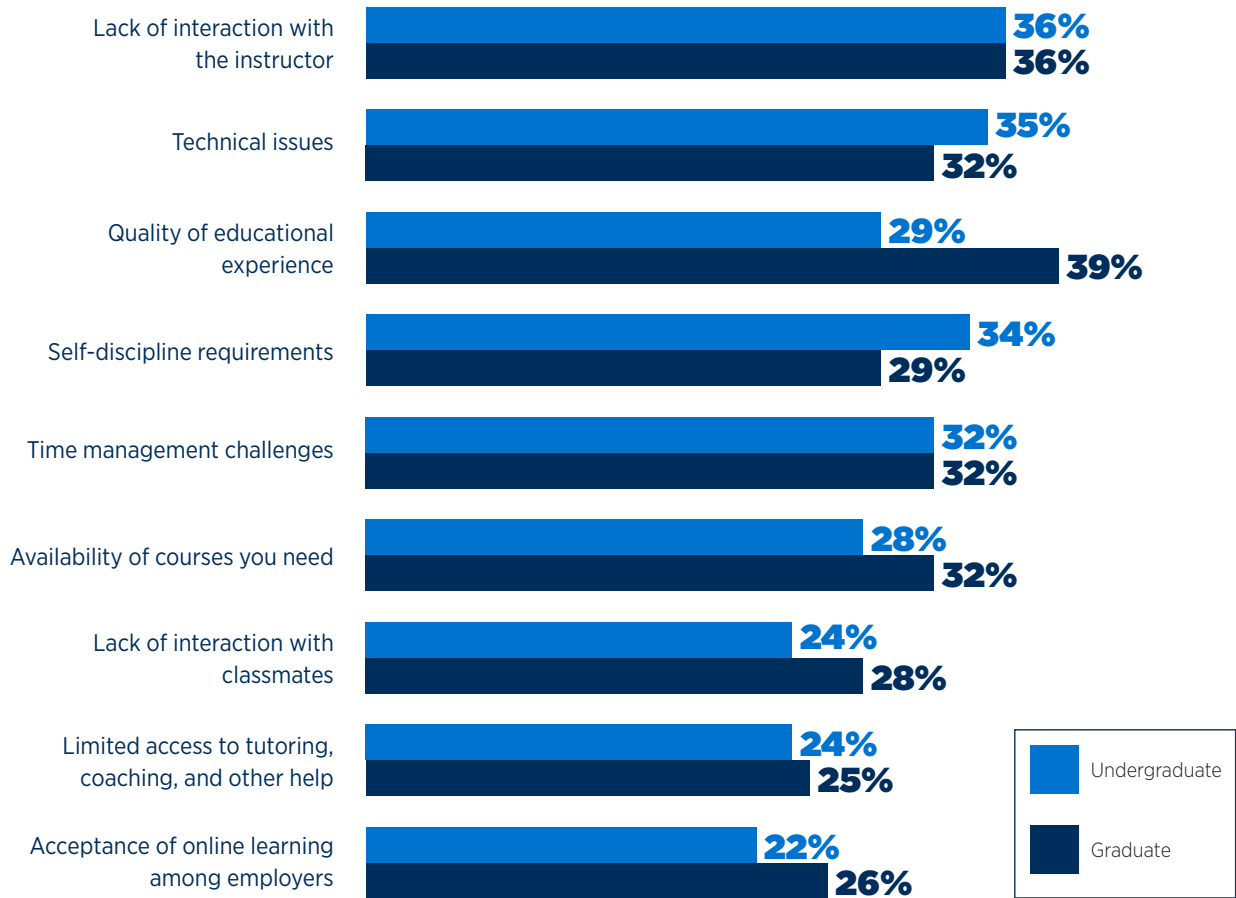
Why did they decide to enroll in a graduate online program?

“I’m looking for a promotion and a master’s degree is needed for that. Online allows me to still work while I am in school so I’m not losing any career momentum.”

“I have social anxiety and I don’t drive so online is a lot easier way for me to finally get a master’s degree.”

“I can complete my grad courses at my own pace without disrupting my work life or my family duties.”

**Figure 12: What are your greatest concerns about online study?
(Select all that apply.)**





Implications for institutions

Understanding student motivations is key to enrollment growth, and nothing is more important to online students than career advancement—with 41 percent of undergraduates and 61 percent of graduate students indicating that career advancement is their primary driver. Because of this and their need to continue working while studying, students highly value the flexibility of online programs, with the ability to learn at their own pace and manage their schedules being the top reasons for enrollment. Comments like “Online learning allows me to create my own schedule and is affordable” (undergraduate) and “Online study allows me to create a personalized schedule that fits around my other commitments” (graduate) exemplify this.

However, some concerns persist regarding online education. Engagement with instructors, technical issues, and the overall quality of the educational experience were the most frequently cited concerns. It’s important to note that no single concern was shared by more than 38 percent of respondents, suggesting that students not only accept online learning but are also very comfortable doing so, possibly due to the recent shift to remote education (and myriad other remote experiences) during the pandemic.

These findings offer valuable direction for institutions in three key areas: marketing, curriculum development, and student support. Marketing messages should emphasize career preparation and the flexibility of online programs. Additionally, addressing how students can engage with instructors and peers is crucial. Highlighting positive experiences through testimonials from current and recent students can alleviate concerns about educational quality.

Programs should be designed to accommodate the diverse schedules of online learners. Course materials and assignments need to be accessible, manageable, and cater to different learning paces. Robust technical support is essential to address technical concerns. Furthermore, fostering interaction between instructors and students, as well as among students themselves, is critical. Strategies like virtual office hours, interactive discussion forums, and collaborative projects can help achieve this.

By understanding the motivations and concerns of online learners, institutions can tailor their online programs to better serve this growing student population, ultimately leading to increased enrollment and student satisfaction.

—Chelsea Hoffman, Vice President, RNL

3. How should institutions position their online programs in a crowded market?

In addition to incorporating messaging that speaks to online student motivations and concerns, programs that seek to maximize interest among prospective students are well served by understanding issues such as:

- Prevailing attitudes about online study
- Likelihood that students are considering both classroom and online programs
- Number of programs with which a given online program may be competing
- Proximity of students to the institution offering the program
- The most important factors in their enrollment decision

Institutions that jump from motivations and concerns to enrollment decision-making priorities may miss important strategic elements in their positioning. Assuming that online students question the quality of online study (they don't), that they are only considering online (quite likely), are applying to multiple programs (almost certainly), or do not live near you (almost always) and are therefore not familiar with you can all weaken the effectiveness of the positioning of the program in the crowded online higher education space.

Figure 13: How would you rate the quality of your online education experience when compared with past classroom study?

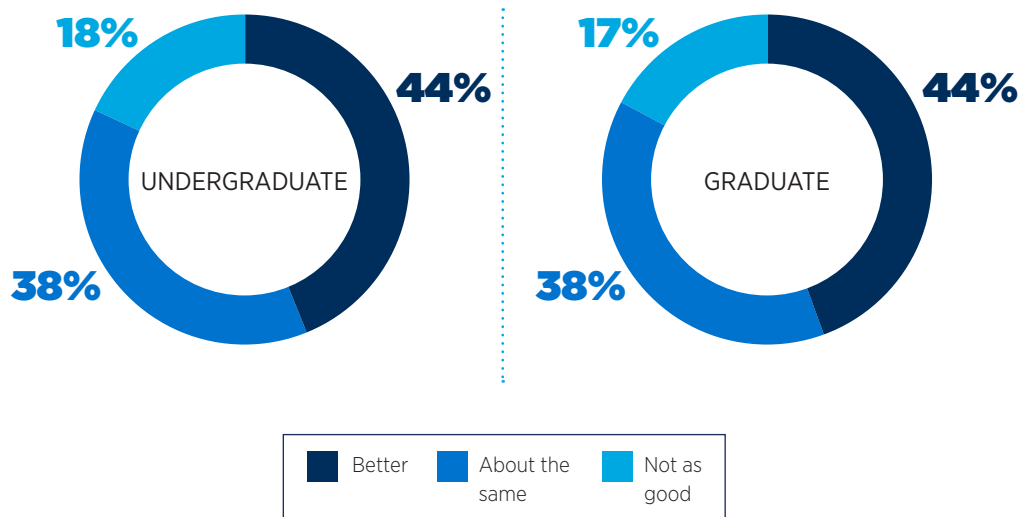


Figure 14: Would you have enrolled in a completely in-person (classroom) program if you could not find an online program in your subject of interest?

	UNDERGRADUATE	GRADUATE
Yes	34%	27%
Maybe	39%	49%
No/Not likely	23%	24%

Figure 15: To how many online programs did you apply?

	UNDERGRADUATE	GRADUATE
One	33%	36%
Two	46%	43%
Three or more	21%	21%

Source: 2022 Online Student Recruitment Report, RNL

Figure 16: How far from where you reside (or resided at the time) was the furthest online program you considered?

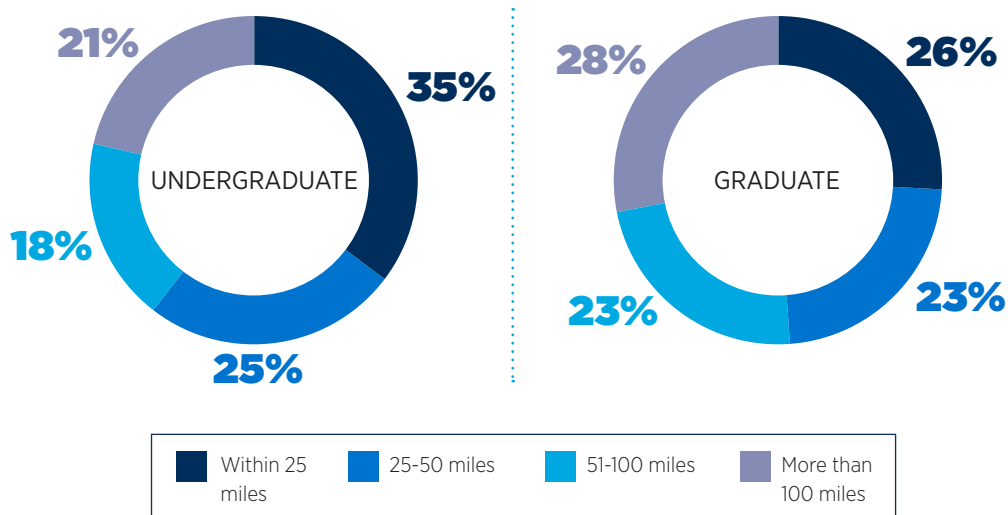
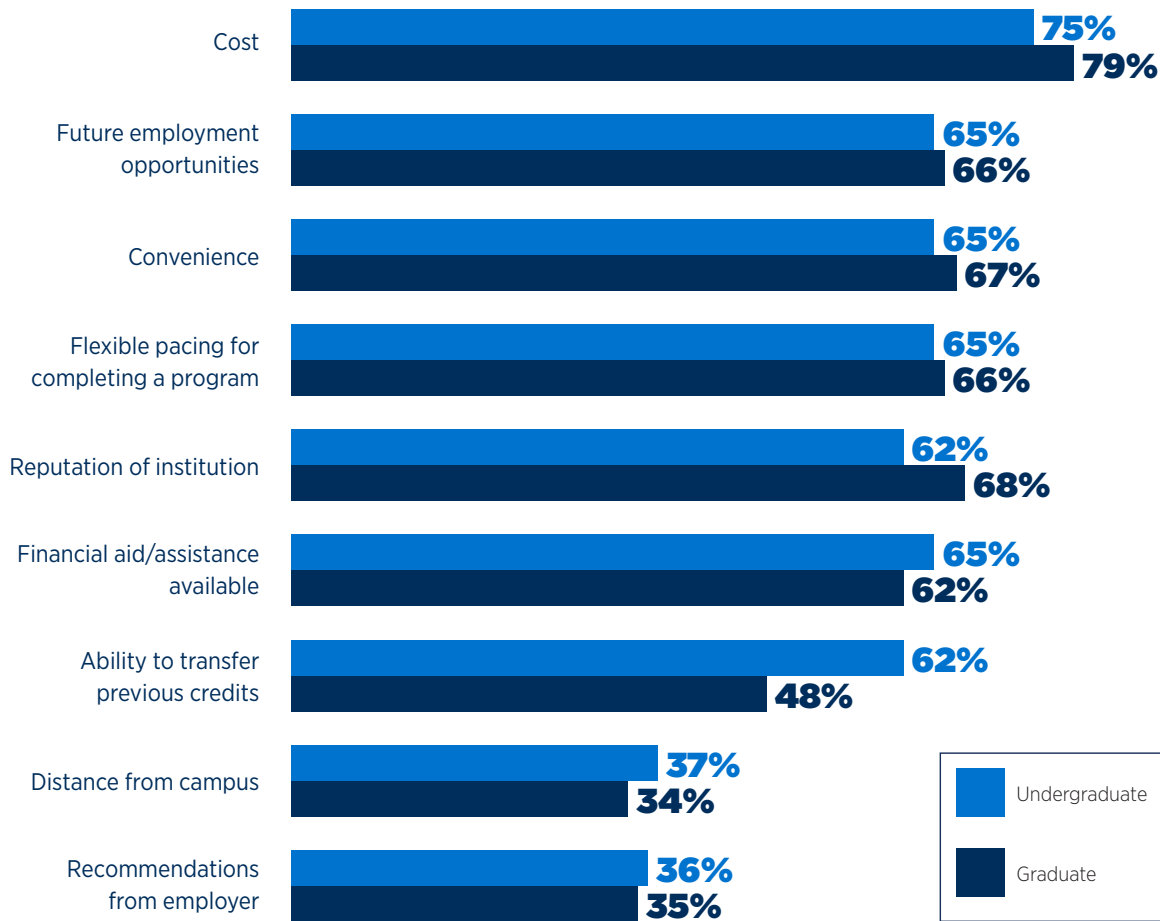


Figure 17: How important are each of the following in your enrollment decision?





Implications for institutions

Navigating the crowded waters of online higher education requires a standout strategy. As online programs multiply, differentiating your program from the rest can be hard for prospective students. These data can underpin ways to position your online programs, ensuring they not only attract attention but also deliver on their promises.

Student preferences and market dynamics: You must understand what students want, how they perceive online education, and where they want it. While online programs transcend physical boundaries, many students value local programs for networking and support. For example, a student in Los Angeles may prefer an online program in California over one in New York because of potential networking events, job fairs, a local internship, or just being able to attend to details by going to campus.

Motivations like flexibility, cost, career advancement, and the quality of education play massive roles in their choice. Most students meticulously weigh the perceived quality of the program and its ability to help them get a job of their choosing as the primary value in their decision. These data also indicate that many online students think that online study is just as good (quality) as past classroom experiences.

Standing out in a crowded field: Effective positioning in a saturated market also involves delivering it in a way that resonates uniquely with them. Your programs should not only meet student needs but also anticipate future trends and industry demands. For instance, if a business school offers an online MBA with a focus on digital entrepreneurship, highlight how this specialization is aligned with the growing gig economy and digital marketplaces, catering to budding entrepreneurs.

Turning challenges into marketing gold: The challenges of marketing online education often revolve around differentiating your offer in a market where every institution boasts high-quality education and flexible formats. *The secret? Focus on what makes your programs uniquely beneficial.* If your university's online program offers asynchronous study that allows students to learn at their own pace, market this feature to attract professionals who are balancing their education and a full-time job.

Moreover, tackle misconceptions head-on by promoting the rigorous academic framework and interactive components of your programs. For example, if students participate in virtual reality simulations or real-time interactive sessions with industry professionals, these are standout features that should be highlighted in your marketing campaigns.

The Power of digital storytelling—crafting compelling narratives: Storytelling isn't just about telling; it's about engaging. Effective use of digital marketing tools can turn a simple program description into a compelling narrative. Social media platforms, blogs, and podcasts can tell stories that engage potential students on a personal level. For instance, a series of podcast interviews with alumni discussing how the online program helped them achieve their career goals can be incredibly impactful. Never underestimate the power of a good testimonial. Real-life stories about alumni and their achievements are invaluable.

Where to take your programs' position from here: Positioning online programs effectively in a saturated market is an art and a science. By focusing on strategic insights, a detailed understanding of student needs, and robust marketing strategies, you can paint a picture where potential students see undeniable value in choosing your programs. Let's not just meet expectations; let's exceed them and set new benchmarks in online education.

—Jason Issac, Creative Director, RNL

4. What are the hallmarks of online programs in which students will enroll?

The online market continues to evolve while maintaining core elements that make it an attractive option. Online students continue to expect all the hallmarks of flexibility and convenience (some of which call for less freedom for faculty to diverge from standard practices), but other key aspects have changed. The subjects in which they enroll have extended well beyond the business and healthcare subjects of years past. The demand to take multiple courses at one time (particularly among undergraduates) with the majority of both undergraduate and graduate online students now enrolling full-time (while 80+ percent also indicate that they are employed). The most important student services are now technical assistance and career planning as students have become increasingly comfortable doing things online.

The demand for generous acceptance of previously earned credit and for online bachelor's programs in which students with any number of previous credits (rather than those that presume students to have earned the first 60) is clear. While less than 10 percent of online bachelor's students enroll with no previous credit, only 21 percent enroll with 60 or more.

Figure 18: What is the major/subject of your online degree program?

UNDERGRADUATE

Business Administration	16.0%
Computer/Information Science	5.9%
Psychology	5.3%
Accounting	4.5%
Criminal Justice	4.4%
Biology	4.3%
Art	3.9%
Nursing	3.7%
Healthcare Administration	3.2%
Computer Engineering	2.1%
Finance	1.9%
Communications	1.8%
Business Analytics	1.7%
Management	1.7%
Educational/Higher Education Administration	1.5%

GRADUATE

Business Administration	19.3%
Accounting	4.0%
Computer/Information Science	3.7%
Educational/Higher Education Administration	3.4%
Psychology	3.3%
Nursing	3.0%
Business Analytics	3.0%
Artificial Intelligence	3.0%
Healthcare Administration	2.7%
Art	2.6%
Social Work	2.6%
Economics	2.4%
Human Resources Management	2.4%
Biology	2.1%
Finance	2.1%

Figure 19: In how many courses do/will you enroll in each term or semester?

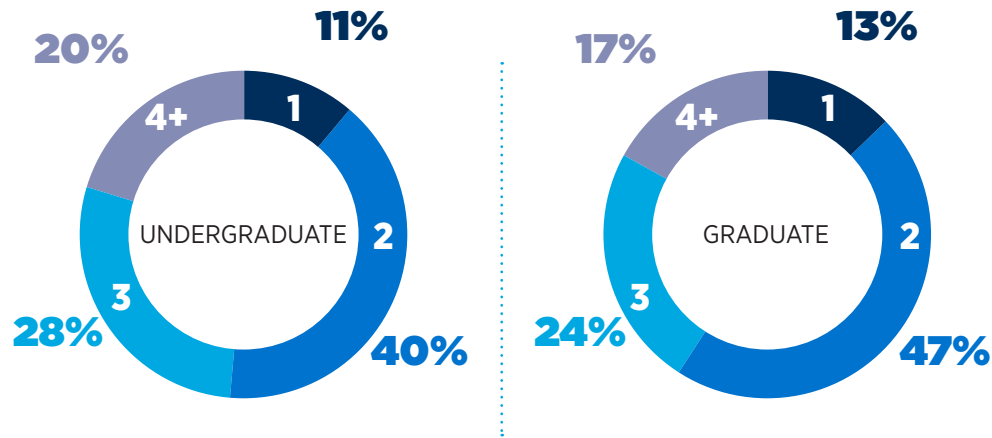


Figure 20: Did/will you enroll full-time or part-time?

	UNDERGRADUATE	GRADUATE
Part-time	46%	52%
Full-time	54%	48%

Figure 21: What characteristics do you value most in a program?

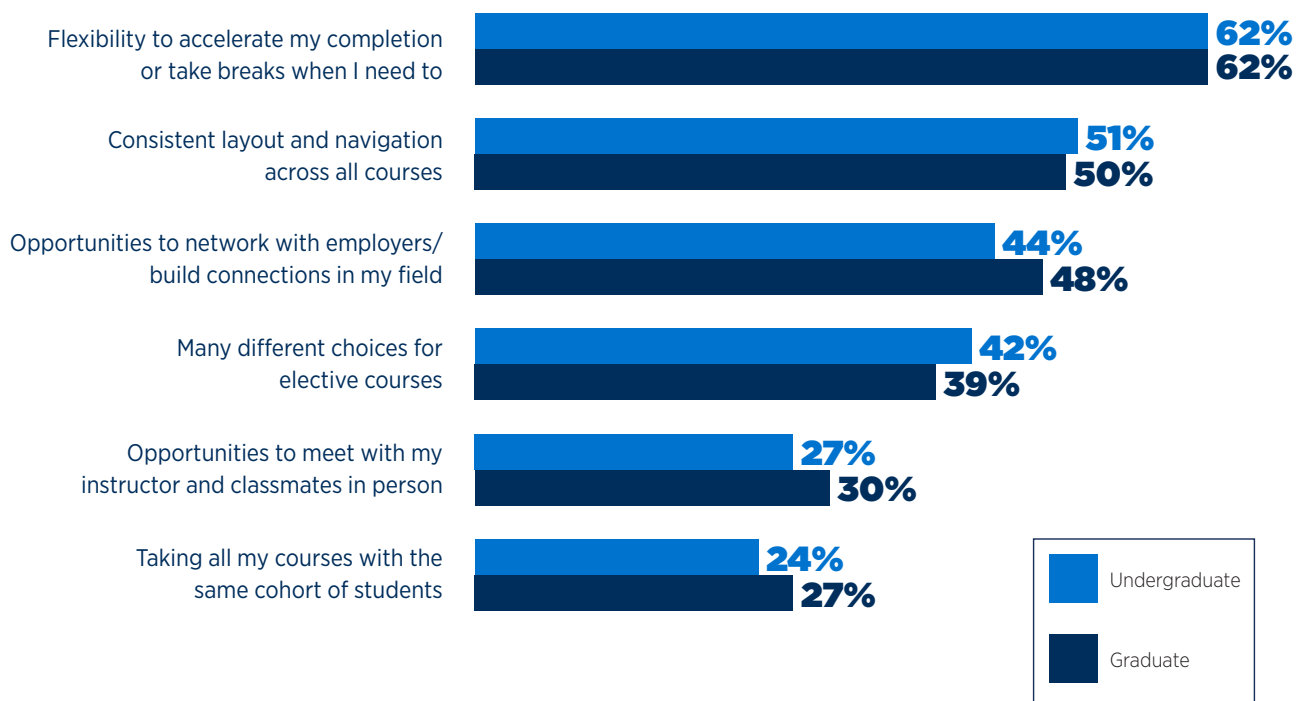
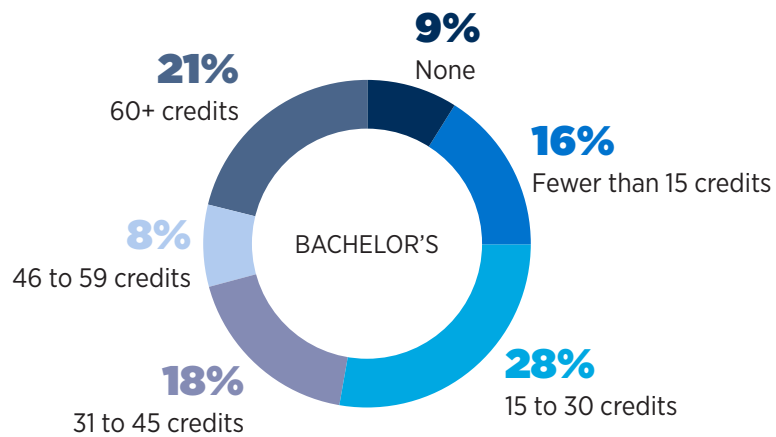


Figure 22: Which of the following support services are most important to know are available in your online program?

	UNDERGRADUATE	GRADUATE
Most important		
Technical support	54%	52%
Career development	52%	53%
Research assistance	44%	46%
Instructor or peer tutoring	43%	40%
Virtual library assistance	42%	41%
Career networking services after graduation	40%	46%
Less important		
Writing center	30%	29%
New student orientation	30%	26%
Peer community forums	29%	28%
Wellness/health resources	28%	23%

Figure 23: How many college credits had you earned before considering an online bachelor's program?





Implications for institutions

Think expansively about new program areas: It is clear that both undergraduate and graduate online students are still most frequently interested in a business degree, but students are now comfortable studying an incredibly wide array of subjects online. Institutions should consider a wide array of programs that align with their areas of strength and expertise.

Ensure flexibility that allows for intermittent full-time and part-time study: Online students are just about as likely to enroll full-time as part-time—with undergraduate students slightly more likely to enroll full-time. Online students also enroll in two or more courses. When combined with data presented later in this study regarding the length of their online courses, it is clear that full-time (and part-time) online students prefer to enroll in concentrated, shorter courses that require intense focus and then move on to the next course—all with an eye on the end point of their studies.

Flexibility for the student, consistency for instructors: Course design and support service preferences indicate that online students need flexibility for themselves and more consistency in their course design (thereby less flexibility for instructors in how they organize their courses.) With 60 percent of students at both levels indicating they need “flexibility to accelerate my completion or take breaks when I need to,” it is clear that asynchronous programs continue to be in the highest demand and most attractive. The next most attractive feature is “consistent layout and navigation across all courses.” Make it a priority that instructors (within each program) all use the same templates and layouts. Online programs that cannot get faculty to agree to this type of consistency (for any number of reasons) risk losing students who can find a better experience elsewhere.

Reconsider cohorts and related features: Online students are no longer interested (in the aggregate) in cohorts and have diminished interest in face-to-face meetings with their instructors and classmates in comparison to the earlier days of online programming. Ensure that your programs are aligned with today’s student preferences rather than those that were preferred at the time the programs were developed. Institutions should take particular note of the decline in interest in cohorts, as such programs and similar “hybrid” programs that require occasional in-person meetings were among early adopters of the online modality.

Services should focus on the practical and pragmatic: Online students are demonstrating an increasingly pragmatic mindset regarding the support services that online students want to have available. The services deemed most important are focused on technical support and career development, with new student orientation, peer community forums, and wellness/health resources falling near the bottom of the list. This represents a dramatic departure from previous research in which academic support services, tutoring, research assistance, and similar services topped lists of the most important student services.

All this points toward the “consumer” mentality that is emerging among online students. They want maximum convenience and flexibility, while simultaneously expecting a predictable user experience. This is a clear sign that the most successful institutions will be those that find ways to meet students where they are, on their terms, rather than attempting to repackage the traditional pedagogical norms for the online market.

—Dani Rollins, EdD, Vice President. RNL

5. How do online students want their online courses configured?

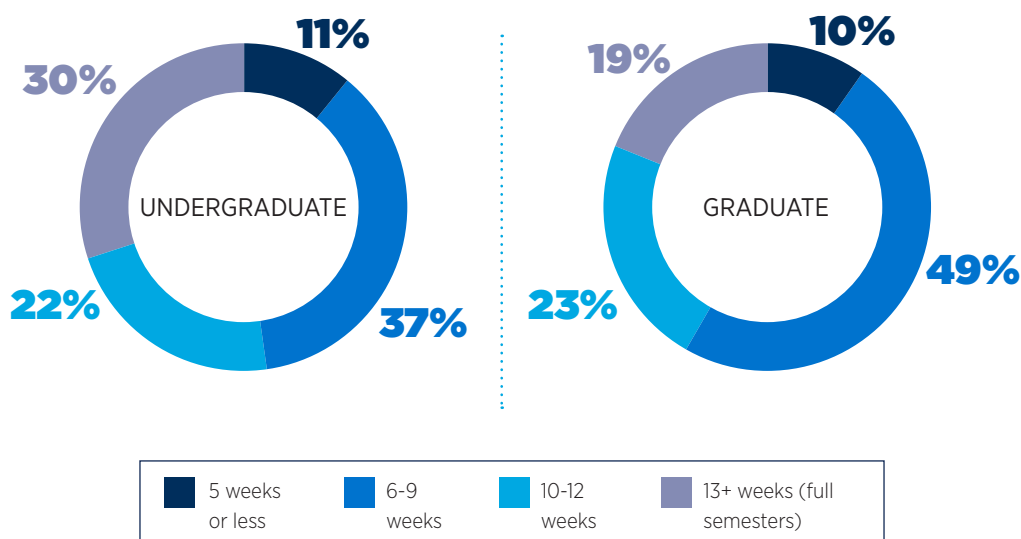
With the level of choice available to online students, enrollment growth is not exclusively focused on having the right programs with the right types of support. It is also critical that online course structures align with student preferences. Today's online students prefer to enroll in a program at an institution they know. If they cannot find a local program that aligns with their convenience markers, they will consider programs further afield.

Consider the following:

- If your courses are not accelerated into shorter terms, you will only attract a sliver of the market.
- If your programs are completely self-paced, you will only attract half of the market.
- If you require synchronous convenings, you will attract fewer students than if you have optional convenings.
- If you are not incorporating AI into your instruction, increasing numbers of students may look elsewhere, particularly as they want to be “AI-ready” for the workforce increases.

Online program leaders should also consider how promotion and positioning can highlight elements of online courses that are most attractive to online students (e.g. “course assignments help build career-relevant skills” or “coursework features clear and consistent instructions”). Featuring information on optional synchronous activities also helps to counteract one of the greatest concerns among prospective (but less so among enrolled) online students: engagement with their instructor and classmates.

Figure 24: Over how many weeks do/will your online courses meet?



Source: 2022 Online Student Recruitment Report, RNL

Figure 25: In which type of online programs did you/are you more likely to enroll?

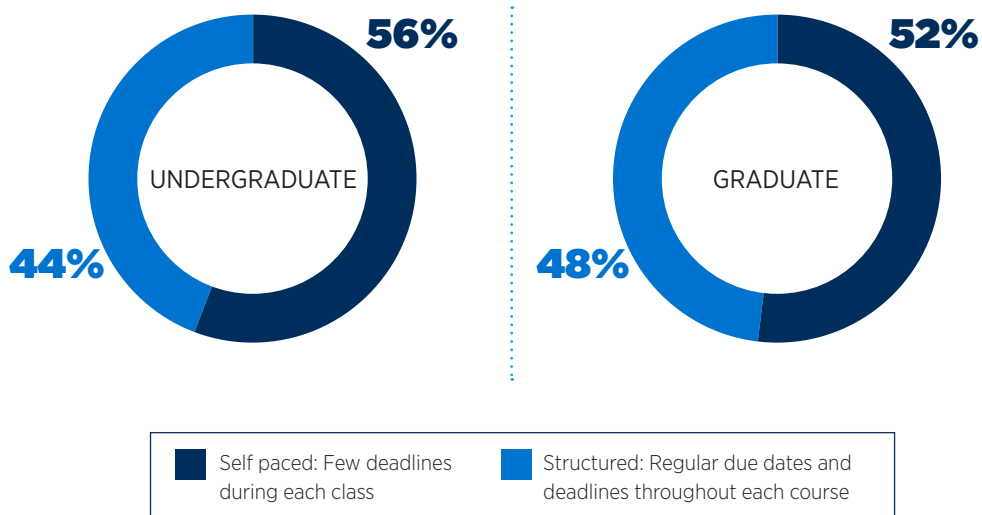
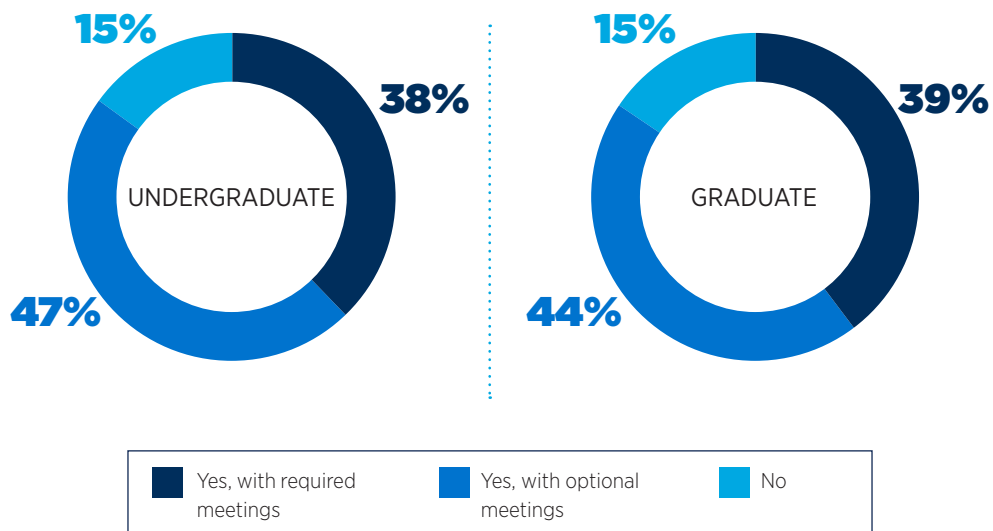


Figure 26: Does/will your online program offer “real-time”/live opportunities to convene with your instructor and classmates?





Implications for institutions

Recognizing the profound implications of the evolving online landscape, university leaders responsible for the expansion of online degree programs should carefully consider how the preferences and expectations of online students should be woven into programming in the following areas:

Program structure alignment and key elements of online courses: Collectively, a strong online course design and support model aligned with best practices will enable the institution to not only attract new students but even more importantly, retain them and allow them to realize their personal and professional aspirations.

- **Course duration:** Online students prefer short courses (most frequently of six to nine weeks) as part of their focus on flexibility in their academic pursuits. Institutions that create two terms within existing semesters and add two summer terms of the same length will attract online students at a volume that semester-length programs will not.
- **Synchronous options:** Offering optional live/synchronous sessions provides meaningful connections with faculty and peers without placing undue restrictions based on time and place. Prominently promoting optional synchronous opportunities also helps address the greatest prospective online student concern: how they will engage with their instructor and peers.
- **Career-relevant assignments:** Courses and assignments that build relevant career skills are crucial. Skill development and practical education top students' expectations and assuring that online courses meet these needs and allow for practical career application will make your programs stand out. Digital badges, which provide students with a tangible signal of specific skills learned (and shared with prospective employers) are being added to the most competitive online programs.

Market attraction strategies: As universities seek to differentiate their online programs and provide easy-to-access technology, AI is increasingly playing a role in the online classroom and student support structures.

- **Accessible technology:** Easy access to technology is essential for student success. This is particularly important as institutions are increasingly mindful of the diverse student populations in their classrooms and the importance of accessibility.
- **AI integration:** As faculty, students, and staff continue to experiment and utilize AI technologies, universities should consider opportunities for incorporating AI into instructional and support systems. Online students who are technology savvy may see value in gaining skills in their academic pursuits and in being "AI-ready" for the workforce. As institutions prepare governance structures and implement new AI technologies into their systems, first movers may gain a competitive advantage and attract more interest.

Ultimately, competitive universities are adapting to student preferences. This affects how they design their courses and programs and how they communicate the differentiated value propositions that resonate. Next, institutions that want to gain a competitive foothold will likely have to strategically integrate AI technologies to enhance the learning experience and associated support services.

—Andrea Carroll-Glover, EdD, Vice President and Sr. Consultant, RNL

6. How do online students search for and research programs of interest?

92% of students conduct a web search for an institution as the first or second thing they do in the search process.

Source: 2023 Graduate Student Recruitment Report, RNL

Online students typically consider multiple programs and online growth has slowed as students move on from the pandemic. This may represent a “market correction,” but it is important to note that online enrollment—at both the undergraduate and graduate levels—remains the strongest area within American higher education. Institutions seeking online enrollment growth need to have the right programs (as laid out in Questions 4 and 5), must be positioned optimally (as laid out in Questions 2 and 3), and likely need to begin to employ AI to enhance the student experience (as laid out in Question 1).

But these things will end abruptly if prospective students do not know you have a program in their area of interest. While an unprecedented number of online students enroll in programs in their home region, they almost exclusively rely on digital means to find online programs of interest. Nearly half remember first seeing ads for online programs on a search engine. Two years ago, nearly 80 percent indicated that they used a search engine in their search, and one year ago 92 percent indicated that they conducted a search on a search engine as their first (40 percent) or second (52 percent) step.

Online students in large numbers also click on digital ads, and they do so most frequently because the ad copy and imagery resonate with them. This may be at least partially due to the number of national online institutions with sophisticated and pervasive marketing, but it is a benchmark that all institutions seeking to compete in the online space need to meet.

Figure 27: Where did you *first* see an ad about an online program that interested you? (2024)

	UNDERGRADUATE	GRADUATE
Ads on websites I visit	31%	28%
Videos on YouTube or elsewhere	29%	28%
Ads on streaming TV (e.g.: Hulu, YouTube TV)	29%	25%
Ads on broadcast or cable TV	24%	26%
Ads on professional social media (e.g.: LinkedIn)	22%	27%
Ads on billboards, buses, and other outdoor places	15%	13%
Ads on consumer social media (e.g.: TikTok, Facebook)	15%	12%
Ads on streaming radio (Sirius, XM, etc.)	12%	13%
Ads on local broadcast radio	10%	12%
Other	10%	9%

What were (all of) your early sources of information about online programs? (2022)

	UNDERGRADUATE	GRADUATE
Search engines (Google, Bing, etc.)	79%	78%
Ads on social media (e.g.: Facebook, LinkedIn, etc.)	47%	59%
Someone I know	42%	44%
Ads on websites	43%	42%
Ads on streaming TV (Hulu, YouTube TV, etc.)	41%	38%
Ads on broadcast or cable TV	37%	40%
Videos on YouTube or elsewhere	35%	38%
Printed viewbooks, program brochures, etc. from institutions	30%	29%
Ads in newspapers, magazines, etc.	27%	30%

Source: 2022 Online Student Recruitment Report, RNL

Figure 28: Did you click on a digital ad during search?



Why did you click on a digital ad?

	UNDERGRADUATE	GRADUATE
The ad copy made me want to click	42%	56%
I didn't know the school, I wanted to learn more	41%	35%
I know the school, didn't know about the program	36%	30%
I know the school and program, ad reminded me to take the next step	19%	21%

Source: 2022 Online Student Recruitment Report, RNL

Figure 29: Once you had identified programs of interest, how did you research specific programs to make your enrollment decision?

	UNDERGRADUATE	GRADUATE
Read information on program pages/college websites	61%	62%
Visited other websites	42%	48%
Watched videos on program pages/college websites	41%	38%
Watched videos on YouTube or elsewhere	32%	32%
Read printed/online rankings guides (U.S. News, Peterson's, etc.)	26%	33%
Obtained printed materials from institutions	22%	22%

Figure 30: Did you watch videos during your search for an online program?

	UNDERGRADUATE	GRADUATE
Yes	76%	76%
No	24%	24%

Source: 2022 Online Student Recruitment Report, RNL

Figure 31: How effective did you find chatbots in providing the information you needed during your search?

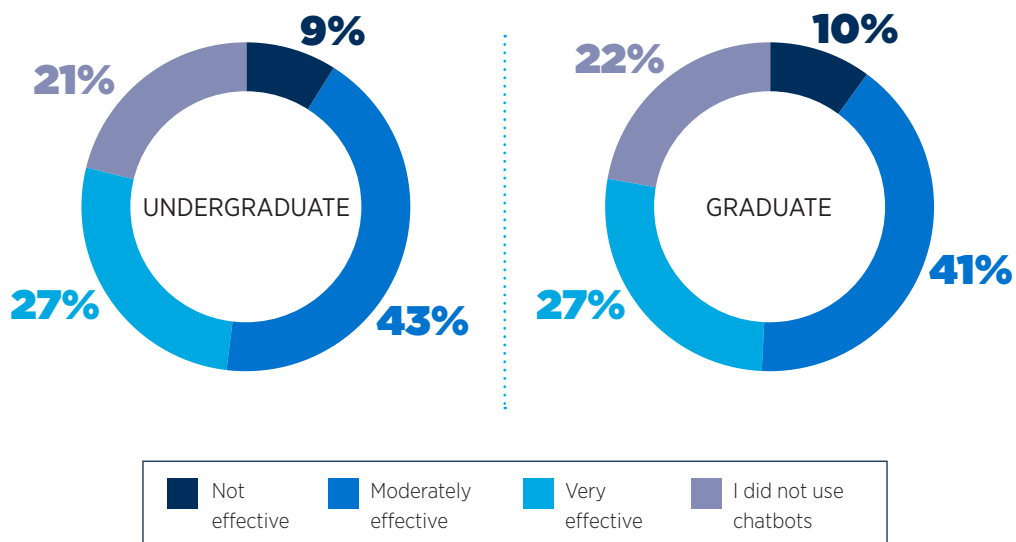
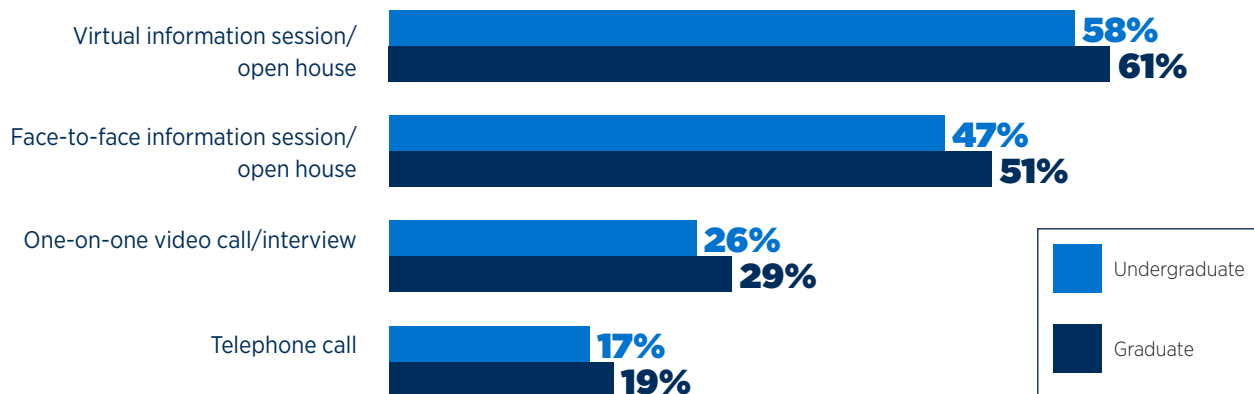


Figure 32: Which types of information and assistance do you think an online program chatbot should offer?

	UNDERGRADUATE	GRADUATE
Tuition costs	58%	60%
Information about courses	58%	56%
Financial aid information	56%	54%
Admissions requirements	55%	56%
Admissions deadlines	48%	54%
Program/graduation requirements	47%	54%
Student services/student resources	47%	45%
Course schedules/academic calendar	47%	51%
How to pay for school	44%	45%
Something else	2%	3%

Figure 33: In which of the following events/communications did you/will you participate during your enrollment process?



Source: 2022 Online Student Recruitment Report, RNL



Implications for institutions

To effectively reach and engage prospective online students, institutions must adopt an integrated digital marketing approach that reflects the ways that these students search, research, and make enrollment decisions. This strategy should emphasize search engine visibility, creative and targeted social media advertising, content marketing with a strong focus on video, and the use of technology such as chatbots to facilitate immediate engagement. When tailored to the nuanced preferences and behaviors (a.k.a personas) of online student audiences, such marketing will significantly enhance an institution's ability to enroll students. Consider the following insights and recommendations based on this report's data:

- **Search engines dominate the discovery phase:** Both undergraduate and graduate students predominantly use search engines (Google, Bing, etc.) as their starting point. This underscores the necessity for institutions to invest in search engine optimization (SEO) and search engine marketing (SEM) to ensure visibility at the critical moment of initial interest.
- **Social media's powerful influence:** The substantial engagement with ads on social media platforms highlights the need for targeted social media advertising strategies. Platforms such as YouTube and Instagram offer valuable opportunities to reach prospective students where they spend their time. Graduate students show higher engagement rates with professional platforms like LinkedIn, so targeting this population there will likely yield favorable outcomes.
- **Digital ads and content matter:** The high percentage of students who clicked on digital ads due to intriguing ad copy or a desire to learn more about the institution suggests that creative and compelling content can effectively draw prospective students' attention. Content marketing, through informative program pages, engaging videos, and insightful blog posts, can serve as influential tools in nurturing interest and guiding decision-making processes.
- **The leading role of video content:** With a significant proportion of online students consuming video content during their search, institutions should prioritize video marketing strategies. These could include program overviews, virtual campus tours, student testimonials, and faculty introductions, hosted both on the institution's website and platforms like YouTube.
- **Chatbots as a necessary tool for engagement:** Given that many students found chatbots to be very or moderately effective, institutions should consider implementing or enhancing AI-driven chatbots. These could provide immediate, 24/7 responses to common inquiries regarding tuition costs, course information, financial aid, admissions requirements, and deadlines.

When it comes to engagement with events or communications, there is a significant preference for virtual offerings at both levels, highlighting the importance of digital engagement in the recruitment strategy. However, face-to-face interactions remain critical, particularly among graduate students, emphasizing the value of personal connection in their decision-making process. Therefore, institutions should adopt a multifaceted approach, integrating both digital and "human" engagement methods. This diversified strategy will cater to varying preferences, fostering deeper connections and improving new student enrollment rates.

—Shane Pruitt, EdD, Assistant Vice President, Enrollment Consulting Services, RNL

7. What do online students expect during the enrollment process?

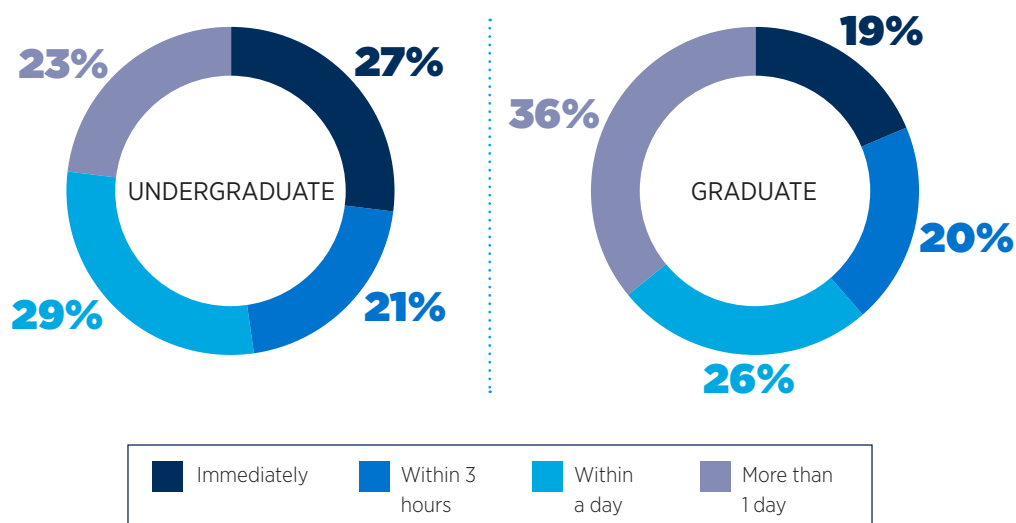
The momentum of market-aligned programs with great messaging and cutting-edge marketing can also be stopped in its tracks by an enrollment experience that does not conform with the expectations of today's students. When institutions do not meet the expectations of online students regarding timely response and personalization of content, these students are highly likely to enroll elsewhere. This is particularly important given that all but about one-quarter of online students apply to two or more programs.

RNL has repeatedly documented (and does so again in Question 8) that between 60 and 80 percent of online students are likely to enroll in the first program that responds to their inquiry or is the first to admit them. Online students also are likely to interpret a slower-than-expected response as an indicator that they are either not important to the program or that the program is not equipped with adequate support services. Neither of these is the type of "first impression" that is in the interest of the program seeking to grow.

Figure 34: How did/will you first contact online programs in which you are interested?

	UNDERGRADUATE	GRADUATE
Fill out an information request form on the school's website	41%	44%
Email the school	19%	19%
Submit an application	16%	14%
Call the school	12%	10%
Attend a face-to-face open house/event	7%	5%
Attend a virtual open house/event	6%	7%

Figure 35: After your inquiry, how quickly do you expect a response from programs of interest?



Source: 2022 Online Student Recruitment Report, RNL

Figure 36: What does a slower-than-expected response signify to you?

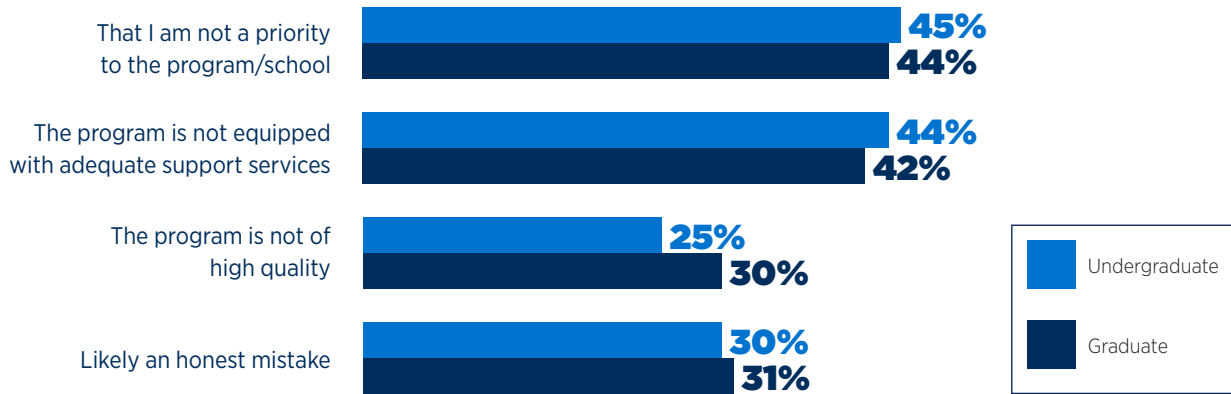


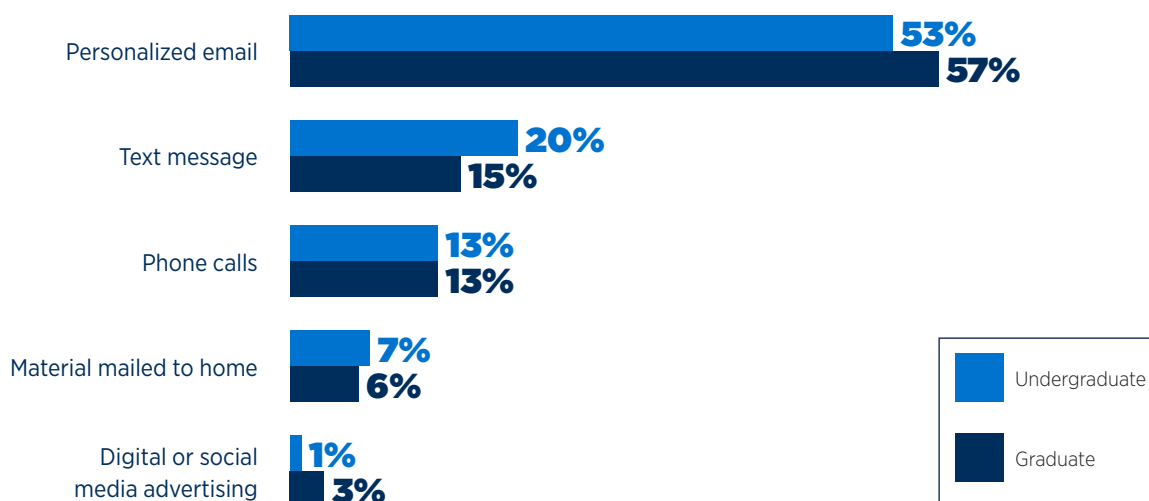
Figure 37: What is the best time of day for you to hear from the colleges/programs that you have inquired about or applied to?

	UNDERGRADUATE	GRADUATE
Early morning (before 9:00 a.m.)	8%	11%
Morning (9:00 a.m.-12:00 p.m.)	40%	34%
Afternoon (noon-5:00 p.m.)	32%	31%
Evening (5:00 p.m.-10:00 p.m.)	17%	20%
Late evening (after 10 p.m.)	2%	1%
Weekends	1%	2%

Figure 38: What are acceptable forms of follow-up from programs of interest?



Figure 39: What is your preferred method of follow-up from programs of interest?

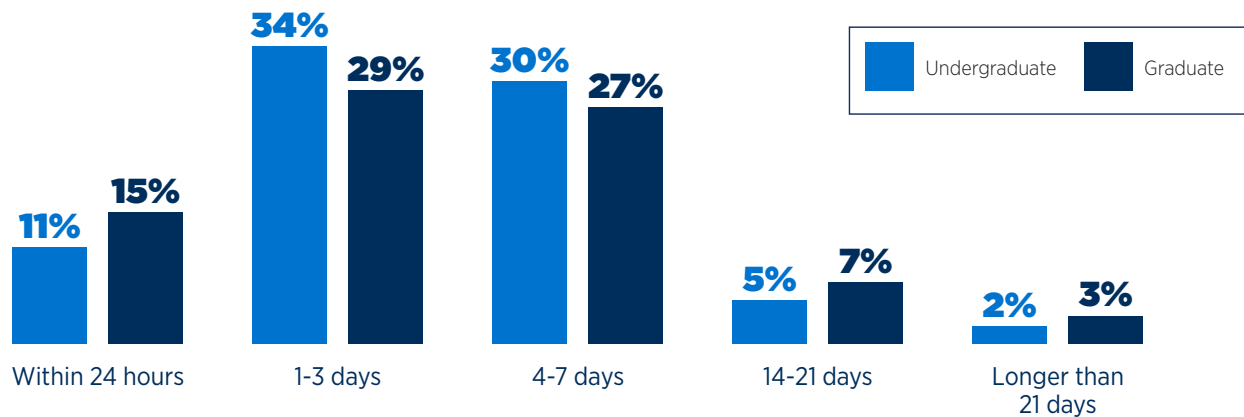


Source: 2022 Online Student Recruitment Report, RNL

Figure 40: After the initial inquiry, how frequently would you expect to hear from an online program of interest?

	MORE THAN ONCE A WEEK	ONCE PER WEEK	EVERY OTHER WEEK	ONCE A MONTH
Email				
Undergraduate	27%	41%	19%	13%
Graduate	18%	41%	24%	18%
Text message				
Undergraduate	25%	37%	22%	16%
Graduate	19%	36%	26%	19%
Phone calls				
Undergraduate	19%	36%	22%	23%
Graduate	17%	31%	25%	27%
Social media platform				
Undergraduate	21%	35%	25%	19%
Graduate	22%	34%	21%	22%

Figure 41: How soon after submitting an application do you expect an admissions decision?



Source: 2022 Online Student Recruitment Report, RNL



Implications for institutions

Unveiling the communication preferences of online students equips enrollment leaders with a winning formula. Tailored outreach delivered via email during mornings or afternoons fosters deeper engagement. Personalization, even a simple acknowledgment of their program of interest, adds a human touch that resonates in the digital landscape. Furthermore, expediting the admissions process is paramount. Targeting a response timeframe within one to seven days, particularly for undergraduates, demonstrates efficiency and keeps them from wandering to competitors (that may admit them faster). By implementing these strategies, online admissions offices can transform communication from a hurdle to a strategic advantage, forging connections with prospective students, accelerating decisions, and ultimately securing a robust enrollment class.

RNL's *2022 Online Program Marketing and Recruitment Practices Report* indicated that more than 80 percent of recruitment leaders respond within 24 hours, but only about 50 percent initiate contact with a personalized email. Improving these practices not only fosters a sense of belonging and value among prospective students but also significantly influences their decision-making process, making it a critical component in the recruitment toolkit.

The expectation for customized communication reflects a broader trend toward personalized digital experiences across all consumer interactions. For higher education institutions, this means utilizing CRM systems and analytics to tailor communications not just by name but by recognizing and addressing the individual's program interests, application status, and other personal details. This approach meets the student's expectations for personalization while also fostering a sense of connection and importance towards the institution.

To address these insights effectively, institutions need to adopt a multifaceted approach that includes refining operational workflows to reduce response times, training staff across departments to understand and meet the expectations of online students, and employing technology to facilitate personalized communication at every touchpoint. Furthermore, the importance of leveraging data analytics to monitor the effectiveness of communication strategies cannot be overstated. By analyzing conversion rates, time to response, and student feedback on the enrollment experience, institutions can make informed adjustments to their strategies in real-time, ensuring they remain aligned with student expectations and market dynamics.

—Reena Lichtenfeld, EdD, Vice President, Consulting Services, RNL

8. What factors drive enrollment decisions?

Positioning, programming, marketing, recruitment, and cultivation come together in the enrollment decisions that online students make. Answering the question “What were the most important aspects of your enrollment decision?” provides some but not all the information that online programs need to maximize enrollment. Other questions included throughout this study provide depth to the insights needed to ensure that students select your online program instead of another.

Consider the following:

- Understanding how students pay for their program and the frequency with which they limit their credits to manage out-of-pocket expenses provides the depth needed to fully understand the importance they put on cost.
- Detail on motivations provides the depth needed to fully understand the importance of future employment opportunities.
- Understanding what a slower-than-expected response means to a prospective online student provides the depth needed to better understand their likelihood of enrolling at the first program to reply to their inquiry.
- Understanding why they put a premium on flexibility and convenience provides the depth to fully understand why these factors play such an important role in deciding to study online.
- Understanding the number of previously earned credits online students frequently bring with them provides the depth to understand why transfer credit policies are of such importance.

Talk with our experts about your online student recruiting strategies

We can help you engage undergraduate and graduate online students so that you can reach your enrollment goals quickly. 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

Figure 42: How important are/were each of the following in your enrollment decision?

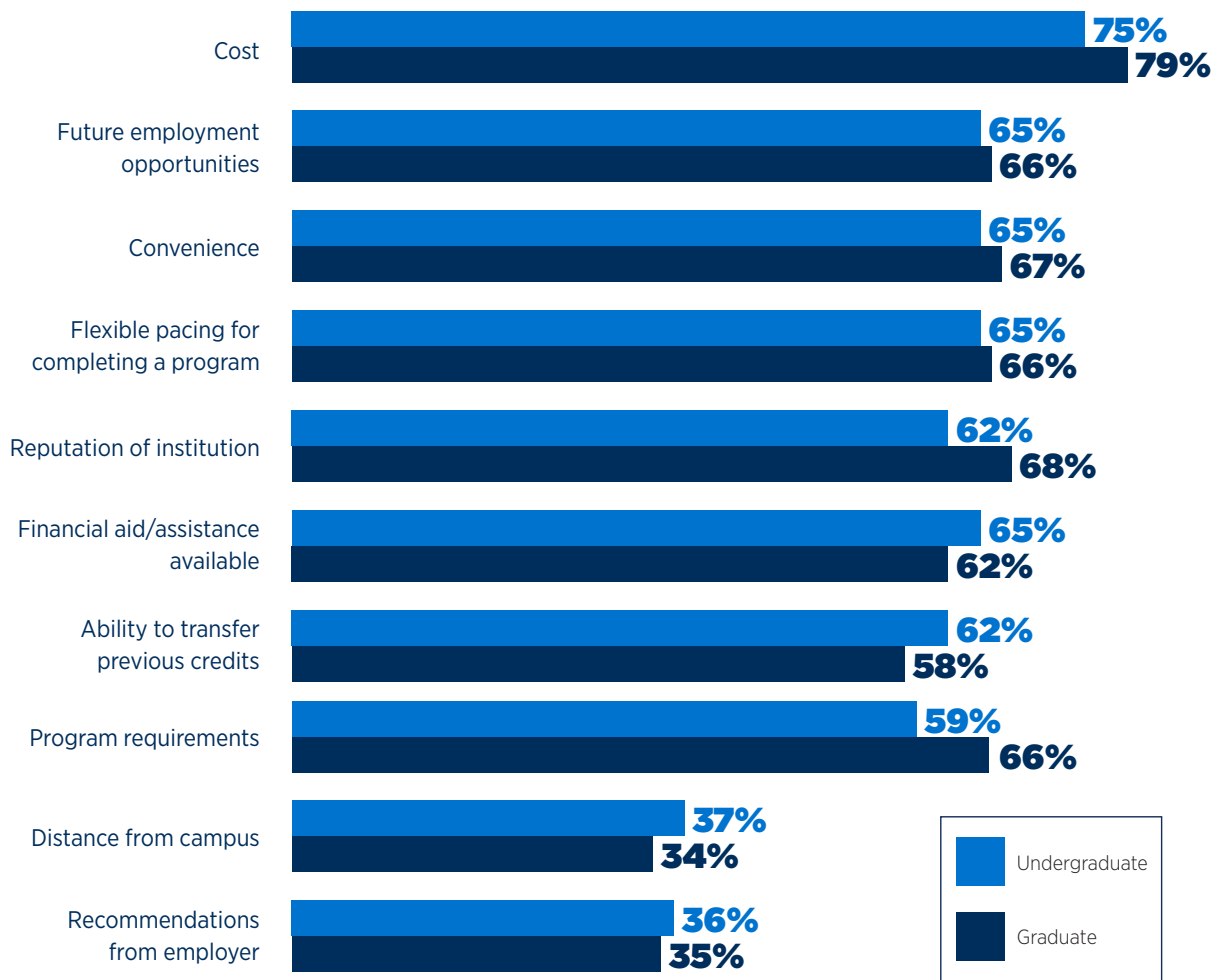


Figure 43: How do/did/will you pay for your online studies?

	UNDERGRADUATE	GRADUATE
Personal funds	47%	59%
Financial aid offered by your college/university	45%	38%
Student loans	38%	32%
Government grants	34%	27%
Employer tuition reimbursement/direct employer payment	17%	27%
Private grants and scholarships	19%	20%
Private loans	14%	17%

Figure 44: How frequently did/will you limit the number of credits in which you enroll in order to manage your “out-of-pocket” expenses?

	UNDERGRADUATE	GRADUATE
Never	12%	12%
Rarely	35%	28%
Regularly	42%	49%
Almost always	11%	11%

Figure 45: How many college credits had you earned before considering an online bachelor’s program?

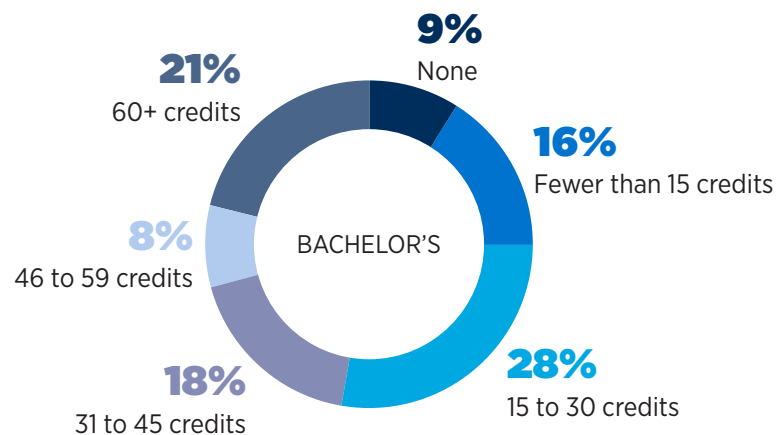
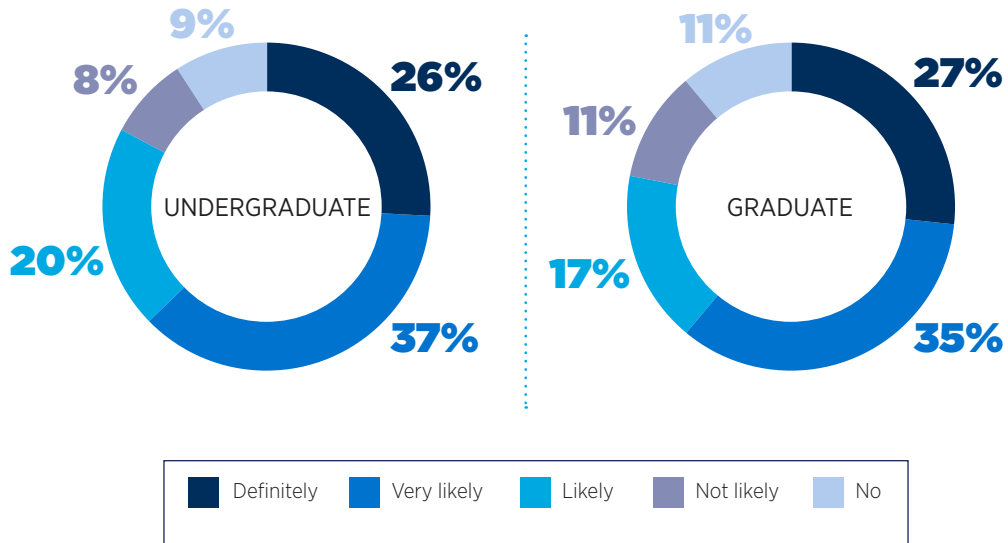
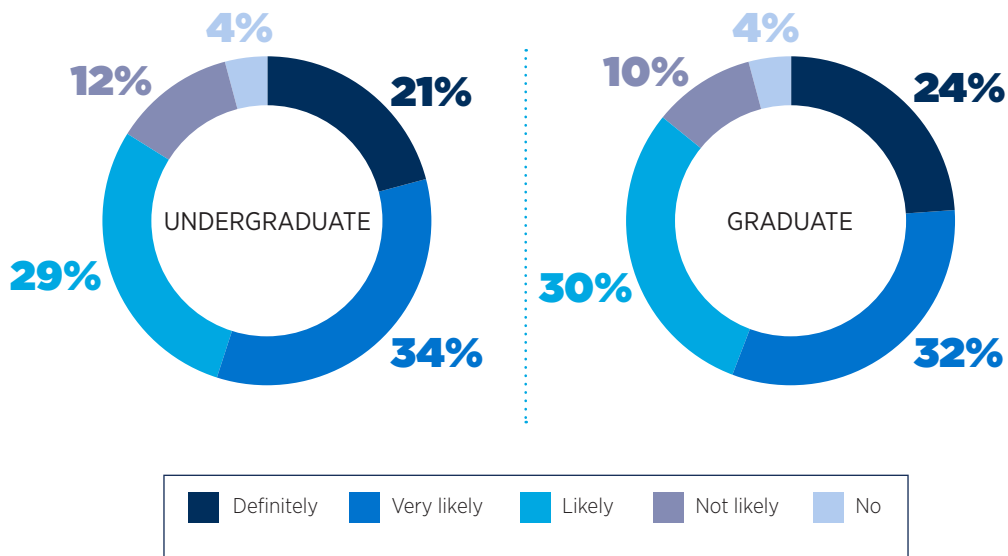


Figure 46: How likely are you to enroll in the first program that responds to your inquiry?



Source: 2022 Online Student Recruitment Report, RNL

How likely are you to enroll in the online program that admits you first?



Source: 2022 Online Student Recruitment Report, RNL



Implications for institutions

These data make clear that there are a number of aspects associated with the cost of study that drive online student decisions, but not exclusively. Value propositions going well beyond cost as well as issues associated with engagement (and feeling they “matter”) are also important drivers.

Careers at the center: Online students enroll to advance their careers. As such, they look for programs that will provide flexibility and the ability to “get in, get through, and get out.” When they find such a program, with the right career focus, they are ready to enroll. Institutions that can deliver on flexibility, career relevance, quality, and outcomes are positioned to optimize enrollment and revenue growth.

Speed wins: Speed is also of vital importance. Programs that cannot respond to inquiries within minutes will not win the student. *More than 60 percent of online students are likely to enroll in the program first to respond and nearly one-quarter will definitely do so. There is an even greater demand for speedy admittance. As many as 80 percent of online students are likely to enroll in the first program to admit them, and 25 percent will do so.* This is a complicated reality for institutions where admissions decisions are not made by the enrollment team. Process changes that ensure that admissions decisions can be made within seven days are critical to *not* lose fully qualified students to your competitors.

Prioritizing changes: If you can focus on only one thing, it should be to first honestly assess whether you can meet these timing expectations. Prioritize scarce resources on advancements in the recruitment team’s speed-to-lead, accelerated application processing, and faster admissions decisions. Perhaps the driving question when making the case for change is: Can we meet our goals if we cede as much as two-thirds of our fully qualified students to competitors?

Recognizing past study may get you over the edge: Online bachelor’s students almost always arrive with previously earned credit. When combined with the importance of cost and “time to degree”, programs with ungenerous transfer credit policies will lose to more generous programs. When seeking to expand credit acceptance policies, emphasize that every retaken course:

- is thousands of dollars taken out of a family’s budget;
- moves the endpoint further afield;
- moves the endpoint even further for students who limit credits to manage out-of-pocket expenses; and
- encourages students to choose a different program, denying you needed enrollment (this is especially true for more expensive institutions).

Don’t hide cost: It is also vital that you make sure tuition (and financial support) information is easy to find. Universities that “hide” such information for fear of scaring away some prospective students are achieving what they most fear. Students abandon their search when they cannot find the information they want within three clicks. What are they most frequently searching for? Tuition and fee information.

—Charles Ramos, Vice President, RNL

9. What prevents and slows online students from enrolling?

Online programs also need to understand what prevents or slows the momentum of students interested in enrolling. Application requirements can be hurdles to enrollment and many institutions want to streamline what is required. Many of the largest online programs in the country have significantly reduced the number of required elements in the admissions process by evaluating each requirement and assessing they inform the potential for the success of the student. Other institutions continue to hold that eliminating requirements is a hallmark of reducing standards.

All but 20 percent of online undergraduates and 25 percent of online graduate students indicate that some combination of these application components might prevent them from applying—with the application fee being the most frequent and nearly all the others possibly affecting roughly one-quarter of applicants.

Figure 47: Which of the following common application requirements might prevent you from completing your application?

	UNDERGRADUATE	GRADUATE
Application fees	45%	40%
Letters of recommendation	27%	28%
Standardized test scores	27%	25%
Resume	26%	23%
Portfolio of work	25%	25%
Transcripts from previous study	26%	21%
Essay/personal statement	20%	23%
Writing sample	22%	17%
None of these things	20%	25%

What factors are most likely to prevent students from enrolling in an online program?

Undergraduate students: Based on the responses, the most common factors that could deter individuals from enrolling in undergraduate programs are:

- **Cost/tuition fees:** Many respondents express concerns about the financial burden associated with enrolling in a program.
- **Time constraints:** Balancing work, family, and other responsibilities can make it difficult to find the time to dedicate to studies.
- **Health issues:** Some respondents mention health concerns as a potential obstacle to enrolling.
- **Confidence/self-doubt:** Lack of confidence in one's abilities to succeed academically can be a deterrent.
- **Access to resources:** Issues such as lack of reliable internet access, transportation, or access to necessary supplies can hinder enrollment.
- **Lack of information:** Not having sufficient information about available courses, enrollment processes, or accreditation can also be a barrier.
- **Previous academic challenges:** Concerns about past academic performance, application requirements, or standardized test scores are mentioned by some respondents.

Overall, addressing these concerns through financial aid options, flexible scheduling, supportive resources, and clear communication about program offerings could help mitigate barriers to enrollment for prospective students.

Graduate students: Based on the responses, the most likely factors that could deter individuals from enrolling in a graduate program are:

- **Cost/tuition fees:** Many respondents express concerns about the financial burden associated with enrolling in a program.
- **Time constraints:** Balancing work, family, and other responsibilities can make it difficult to find the time to dedicate to studies.
- **Concerns about program quality:** Some respondents mention worries about the effectiveness of online education or the quality of the curriculum.
- **Application fees:** High application fees can be a deterrent for some individuals.
- **Lack of flexibility:** Limited flexibility in scheduling or program structure can make it challenging for individuals to enroll.
- **Anxiety:** Some respondents mention anxiety as a significant barrier to enrollment.
- **Availability of resources:** Concerns about having everything needed to enroll, such as technology or academic qualifications, can deter individuals from enrolling.
- **Previous academic history:** Worries about grades or previous academic challenges can also be a deterrent for some individuals.



Implications for institutions

When addressing the factors that slow or even prevent online students from enrolling, work cross-departmentally with a focus on the student journey. This requires marketing, admissions, student services, and academic stakeholders to work together to create a seamless experience.

Online students have apprehensions focused on time constraints, cost, confidence, and access to resources. The fact that both levels of students share many of the same concerns simplifies rather than complicates change. Leadership should use a collaborative process that seeks to remove the points of friction to enrollment.

Where to start? As you embark on revamping admissions processes, meet students where they are. Don't ignore market trends and student expectations. Ensure that engagement and communication strategies fit the student, not the academic environment. Put the student experience at the forefront of everything, and you will win the student.

Here are high-impact enhancements to your practices that can become long-term wins:

- **Eliminate unnecessary admissions requirements:** While application fees were the admissions requirement most likely to prevent enrollment, other requirements may prevent no less than one in four online applicants from enrolling. Review each element with a single focus: the extent to which it is an accurate indicator of the applicant's likelihood of being able to complete the program. Many institutions now offer transcript retrieval services in which the institution rather than the student tracks down all past transcripts. This allows for quicker enrollment processing and for institutions to maintain their academic standards.
- **Empower the enrollment journey:** Confidence is directly correlated with preparedness. Make students active participants in their enrollment journey. A high-touch approach that accounts for intrinsic student motivations should inform all that you do. This allows institutions to dispel real-time concerns related to both the admissions process and program requirements.
- **Student support resources:** Offer support services such as academic advising, tutoring, counseling, and technical support to help online students succeed academically and overcome their challenges. Highlight these during the enrollment process to help boost the confidence of students in their decision-making and self-support needs.
- **Engagement and onboarding programs:** Offer (but do not require) orientation programs/online onboarding sessions that familiarize students with the online learning environment, program expectations, and available resources before they begin their coursework. Also, host webinars addressing admissions questions and offer application fee waivers for those who attend.
- **Financial aid and flexible payment options:** Offer financial aid packages, scholarships, and payment plans to online students, and also make sure related information is easy to find (and understand) on program pages. Ensure knowledgeable people are available to help online students with these types of questions.

Institutions must also remember that addressing barriers to entry is not a case of "set it and forget it." The concerns and hurdles that surfaced here are different from those of a few years ago, and the issues that will be at the fore in a few years will be different from those of today. Regularly assess and evaluate how processes and policies support or inhibit online students, and identify (and address) areas that will improve the student experience.

—Kelsey Freidel Nelson, Associate Vice President, Partner Engagement, RNL

10. What are the demographics of online learners today?

The final piece of the puzzle in successfully marketing to, recruiting, cultivating, and enrolling online students is to understand who they are. We began this report by noting that the dominant student population has transitioned from being “Gen X/Millennial” to “Millennial/Gen Z,” with Gen Z students outpacing Gen X students by 5 percent. But what else do we know about the online audience that needs to be incorporated into a marketing, positioning, and program development strategy?

Figure 48: How old were you when you decided to consider an online program?

	UNDERGRADUATE	GRADUATE	ALL RESPONDENTS
19-20	84%	16%	10%
21-24	58%	42%	19%
25-29	52%	48%	11%
30-34	66%	34%	13%
35-39	56%	44%	11%
40-44	49%	51%	12%
45-49	48%	52%	9%
50 or older	54%	46%	15%

Figure 49: On which social media platforms do you spend time?

	UNDERGRADUATE	GRADUATE
YouTube	83%	79%
Facebook	72%	72%
Instagram	68%	67%
TikTok	55%	47%
Twitter	41%	45%
Snapchat	40%	35%
Pinterest	32%	37%
LinkedIn	28%	40%
Reddit	28%	32%
Other	4%	2%
None	1%	1%

Figure 50: How often do you use an AI platform like ChatGPT, Google Bard, etc.?

	UNDERGRADUATE	GRADUATE
Daily	14%	12%
Several times per week	20%	22%
Once a week	13%	12%
Several times per month	12%	13%
Once every month	7%	6%
Less than once a month	35%	35%

Figure 51: Were you employed when you began your search for an online program?

	UNDERGRADUATE	GRADUATE
Yes: remotely	27%	32%
Yes: at my employer's site	43%	39%
Yes: hybrid combining remote and in-person	10%	17%
No	19%	12%

Figure 52: What was your approximate total household income in 2023?

	UNDERGRADUATE	GRADUATE
Less than \$25,000	16%	9%
\$25,000-\$49,999	31%	16%
\$50,000-\$74,999	25%	18%
\$75,000-\$99,999	17%	25%
\$100,000-\$124,999	7%	14%
\$125,000-\$149,999	3%	6%
\$150,000 or more	2%	11%

Figure 53: How do you describe yourself?

	UNDERGRADUATE	GRADUATE
Male	46%	48%
Female	53%	51%
Non-binary	1%	1%
Self-describe	0.00%	0.00%
Prefer not to say	0.20%	0.20%



Implications for institutions

This data shatters traditional assumptions about online learners. The high percentage of 19–20-year-olds considering online undergraduate programs, coupled with a household income range of \$25,000–\$75,000, suggests a growing segment seeking affordability and flexibility. Institutions must adapt to meet this demand by offering not just online programs, but also scholarships and financial aid options targeted towards this income bracket. For graduate programs, the wider age range (21–50+) and slightly higher income range (\$50,000–\$125,000) paint a picture of career-focused individuals seeking upskilling or career advancement.

These students, with a near-even gender split, value convenience and likely juggle work and personal commitments. To reach them, enrollment leaders should leverage the power of social media and consider offering flexible program structures like accelerated courses or evening classes. The nascent adoption of AI chatbots like ChatGPT and Gemini presents a unique opportunity, particularly for this busy demographic. By integrating responsible and ethical AI practices across academics, operations, and support services, institutions can enhance the student experience, offering 24/7 access to information and personalized support. By embracing these findings and adapting their approach, institutions can position themselves to cater to a more diverse online student body, fostering inclusivity and accessibility.

—Reena Lichtenfeld, Vice President, Consulting Services, RNL

Talk with our experts about your online student recruiting strategies

We can help you engage undergraduate and graduate online students so that you can reach your enrollment goals quickly. 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

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Key Takeaways: Five Interconnected Action Steps

When brought together, the mass of data included in this report arrives at five interlinked takeaways that comprise “action items” for institutions seeking to expand online enrollment. These action items are presented in a specific order designed to ensure success. How so? Many institutions begin by creating great programs. However, the highest quality, most market-relevant programs will not result in robust enrollment if the recruitment, positioning, and marketing foundations are not in place at the point of program launch.

① **Invest in the recruitment process:** There is nothing more important for institutions seeking to grow online enrollment than investing in their recruitment team. All other actions in pursuit of growth—the best marketing, the most engaging programs, the best services—will be stopped in their tracks if the institution cannot respond with personalized messaging to inquiries and questions within minutes or a few hours or offer admission within one week.

How RNL helps institutions: While some institutions may have the ability to add staff to handle increased incoming communication, manage the completion of application packets, and cultivate students through the funnel to enrollment, others do not and have turned to RNL to support them in these functions. RNL assigns a team that acts on behalf of the client and becomes a virtual extension of the institution’s enrollment operations. Our experts teach, train, and transfer their expertise to your team ensuring alignment with your institution’s enrollment leaders.

② **Position programs to address aspirations and concerns:** The development of marketing strategies and tactics must be preceded by the development of market-informed messaging and positioning. These must align with the things that drive online students to enroll in a degree program generally, choose an online program specifically, and the concerns that they may bring with them about studying online. Multiple student personas should be developed for each program, but they should all start by addressing the things that are universal to nearly all online students.

How RNL helps institutions: Institutions need to be sure that the resources they are dedicating to ever-more sophisticated marketing strategies and channels reach and resonate with prospective students best matched to the program. Without the right messaging strategy and architecture, those resources may generate low-quality leads. When RNL works with institutions, our creative team works collaboratively to develop persona-based marketing messages, positioning, and strategies that are incorporated with the most up-to-date digital marketing strategies.

③ **Marketing strategies begin with search engine optimization:** The foundation of an effective marketing strategy is digital, with organic search engine optimization at its heart. But in the online domain, with the number of sophisticated national providers competing in nearly every market, the programs that will attract the greatest numbers of students also include paid digital marketing (e.g. social media advertising, retargeting ads) and an innovative approach to more traditional advertising that pushes prospective students to digital sources.

How RNL helps institutions: Marketing expenditures have risen significantly over the last several years as increasing numbers of institutions add online programs, exacerbating what was already a competitive marketing environment when dominated by national online providers. An RNL marketing partnership brings many advantages, but the most important are constant attention to algorithmic changes that necessitate regular adjustment to organic and paid digital marketing strategies, a data-driven and results-oriented consultative approach, and the competitive rates for media spend that come with the volume of business we bring to platforms like Google, Facebook, LinkedIn, and more.

- ④ **Create programs and courses that students want:** Online programs must reflect the subjects that students want to study rather than where there is faculty interest. Institutions must then ensure that the curriculum aligns with student objectives (e.g. advancing their careers). Structures and specific formats of online courses must be developed with an eye on what students need in an online program (maximum flexibility, engagement with their instructors, and relevant support services) to succeed and balance their life responsibilities with their studies.

How RNL helps institutions: Control and direction of the content, curriculum, and specific instructional formats of online programs is the most important aspect of online expansion for institutions to retain. With this in mind, RNL's operations consulting and instructional design resources help institutions ensure that they are using the latest (and highest quality) emerging technologies and pedagogies as well as provide the support and training that allows faculty to remain in control of curriculum with "filling in" current gaps and building long-term capacity.

- ⑤ **Artificial intelligence is increasingly effective in aligning processes with student expectations.** AI-driven chatbots leveraging generative AI will significantly enhance the quality and breadth of the information available 24/7/365 to prospective students. Emerging AI technology has the potential to dramatically improve the enrollment process itself by helping institutions create increasingly student-focused positioning and marketing through the use of generative AI that can leverage verified data/intelligence on student motivations, concerns, and preferences. AI is saving time and allowing enrollment teams to focus their attention on those things for which prospective students continue to prefer interacting with a human being.

How RNL helps institutions: RNL's Edge Portfolio is a suite of AI solutions that delivers a strategic, secure, and round-the-clock resource that fuses today's leading AI technology with decades of expertise from higher education's most trusted consultants. Use these tools to engage students and donors, provide comprehensive, useful responses, create content, analyze data, and deliver insights—saving you time as you better serve your constituents. Plus, our secure platform ensures your data remains private and protected.

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 25 years, Scott has worked with nearly 400 institutions in 40+ states to apply market data to strategic decision making in relation to graduate, adult undergraduate, and online programs. In these experiences, he has developed expertise in how institutions can align with student demand while upholding institutional mission and values. He contributed the chapter on graduate and online enrollment to RNL's *Strategic Enrollment Planning: A Dynamic Collaboration (3rd Edition)* and has been the principal researcher for RNL's *Graduate Student Recruitment Report*, *Graduate Marketing and Recruitment Practices Report*, *Online Program Marketing and Recruitment Practices Report*, and *Serving the Underrepresented: A Review of Graduate Student Data*, as well as dozens of RNL blogs and articles.



Andrea Carroll-Glover: Andrea Carroll-Glover, MBA, EdD, brings nearly 30 years of experience to her role as vice president and senior consultant at RNL. She works with RNL partners to solve challenges by leveraging market insights and analytics. Andrea's expertise draws from a depth of understanding of the adult and online higher education sector. Her marketing and enrollment management knowledge enables her to come alongside institutions to enhance lead generation, marketing, recruitment, and enhance teaching and learning. Andrea was previously vice provost for online strategy and programs/chief online officer at Saint Mary's University of Minnesota.



Chelsea Hoffman: Chelsea Hoffman is an experienced enrollment leader and an expert in enrollment strategies that harness technology. She works with institutions to propel the success of their graduate and online programs, optimize their recruitment efforts, assess the enrollment potential of academic programs, and achieve their enrollment goals more efficiently. In multiple leadership roles over her 14 years at Columbia Southern University, she directed major shifts that led to transformational success. This included optimizing program and course offerings, engaging faculty, and integrating systems to streamline enrollment and student support.



Jason Isaac: Jason Isaac offers more than 15 years of creative and graphic design experience. As creative director, Jason leads the creative and digital marketing teams to deliver award-winning solutions that engage and convert. Since 2006, Jason has played a key role in developing successful omnichannel campaigns for brands such as Cirque du Soleil, 3M, and MGM Resorts International. Jason has been honored with more than 70 ADDY Awards, an esteemed annual competition that acknowledges remarkable accomplishments in the realm of advertising.



Roger Lee: Roger Lee oversees the experience RNL campus partners and employees have with RNL’s AI solution portfolio. He works closely with internal and external stakeholders to deliver a seamless and exceptional experience at every stage of the client journey. Roger offers more than 20 years of experience spanning finance, operations, service management, and quality assurance, holding top-level roles at contact centers and technology solution firms. He’s recognized as an “other-centered leader,” renowned for nurturing transparent environments and prioritizing attentive engagement with both employees and clients.



Reena Lichtenfeld: Reena Lichtenfeld, EdD, brings more than 20 years of experience in higher education administration to RNL as vice president for consulting services. Her areas of expertise include graduate, undergraduate, and online admissions; strategic recruitment and enrollment management/planning; and policy, accreditation, governance, and compliance. Dr. Lichtenfeld is a results-driven passionate higher education professional who brings a broad spectrum of proven tools and strategies to the table. Before joining RNL, she served as assistant dean for enrollment management at Vanderbilt University’s Peabody College of Education and Human Development (TN).



Shane Pruitt: Shane Pruitt, EdD, brings 15 years of recruitment and enrollment experience to his role as associate vice president, enrollment consulting services. He has a proven track record of successfully implementing data-informed enrollment strategy as an on-campus administrator, EdTech consultant, and higher education subject matter expert for a leading management consulting firm. His areas of expertise include undergraduate, graduate, and professional programming; enrollment data analysis and interpretation; and external partnership-building and pipeline development. He previously served as director of student recruitment and advising at the University of Georgia.



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 nontraditional 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: Dani Rollins, EdD, brings a depth of experience and transformational leadership practices to bear on her work with RNL. Dani has been an enrollment management professional for over 20 years and has worked in both the public and private educational sectors, with extensive experience in recruitment, admissions processing, data analysis, and marketing. 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 the University of Arizona.

About RNL



RNL is the leading provider of higher education enrollment, student success, and fundraising solutions. The firm serves more than 1,500 colleges and universities through data-driven solutions focused on the entire lifecycle of enrollment and fundraising, ensuring 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 helps institutions scale their efforts by tapping into a community of support and resources.

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How to cite this report

RNL (2024). *2024 Online Student Recruitment Report*. Cedar Rapids, IA: Ruffalo Noel Levitz. Available at [RNL.com/Online2024](https://www.RNL.com/Online2024).

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