2022 Online Program Marketing and Recruitment Practices

Findings from a survey of online program marketers and recruiters

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10 KEY FINDINGS

This report marks RNL's first effort at understanding the "state of the art" as it relates to marketing and recruiting for fully online programs. The report covers a wide range of topics and provides a snapshot of current online program practices as reported by marketing and recruitment professionals. The following 10 findings best capture those current practices.

1) PUBLIC INSTITUTIONS ARE AHEAD OF PRIVATE INSTITUTIONS IN THE EXPANSION OF ONLINE SINCE THE PANDEMIC BEGAN.

Number of new online programs

	PUBLIC		PRIVATE	
	5 or fewer	More than 5	5 or fewer	More than 5
	61%	**39%**	**71%**	**28%**

2) PUBLIC INSTITUTIONS ARE AHEAD OF PRIVATES IN MAKING UNDERGRADUATE ONLINE PROGRAMS AVAILABLE.

Offering undergraduate online programs

PUBLIC	PRIVATE
78%	**46%**

3) UNDERGRADUATE ONLINE PROGRAM MARKETING AND RECRUITMENT OPERATIONS ARE FAR MORE LIKELY TO BE CENTRALIZED THAN GRADUATE OPERATIONS.

Centralized **undergraduate** marketing	Centralized **undergraduate** recruitment	Centralized **graduate** marketing	Centralized **graduate** recruitment
71%	**70%**	**46%**	**47%**

4) NEARLY ONE IN FIVE INSTITUTIONS WORK WITH AN ONLINE PROGRAM MANAGEMENT (OPM) PROVIDER.

PUBLIC	PRIVATE
15%	**18%**

5) AVERAGE MARKETING BUDGETS ARE STRONG AT BOTH PUBLIC AND PRIVATE INSTITUTIONS, BUT MAY NEED EVEN MORE RESOURCES.

PUBLIC AVERAGE	PRIVATE AVERAGE
$1.04M	**$1.14M**

6) ACROSS ALL LEVELS OF STUDY, SOCIAL MEDIA ADVERTISING IS BY FAR THE MOST COMMON CHANNEL BEING USED TO MARKET ONLINE PROGRAMS.

Undergraduate programs
91%

Graduate programs
89%

7) ON AVERAGE, THE TEAMS FOR RECRUITING ONLINE PROGRAMS ARE TWICE THE SIZE AT PUBLIC INSTITUTIONS COMPARED TO PRIVATE INSTITUTIONS.

Average size of online team

PUBLIC
14

PRIVATE
7

8) UNDERGRADUATE AND GRADUATE RECRUITERS ARE MEETING THE EXPECTATIONS OF ONLINE STUDENTS IN TERMS OF RESPONDING TO INQUIRIES WITHIN THREE HOURS.

UNDERGRADUATE

Institutions responding within 3 hours
42%

Students expecting response within 3 hours
48%

GRADUATE

Institutions responding within 3 hours
48%

Students expecting response within 3 hours
39%

9) ABOUT ONE-THIRD OF BOTH PUBLIC AND PRIVATE INSTITUTIONS ENSURE THAT ONLINE PROGRAM RECRUITERS ARE AVAILABLE OUTSIDE OF BUSINESS HOURS (8 A.M. TO 5 P.M.).

PUBLIC
37%

PRIVATE
30%

10) BOTH UNDERGRADUATE AND GRADUATE ADMISSIONS PROCESSES TAKE LONGER THAN IS EXPECTED BY PROSPECTIVE ONLINE STUDENTS.

UNDERGRADUATE

Institutions admitting within a week of application
65%

Online students who expect admission within a week
75%

GRADUATE

Institutions admitting within a week of application
58%

Online students who expect admission within a week
71%

INTRODUCTION

With the exception 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, American colleges and universities need to expand their complement of online programs—and get better at marketing those they have—in order to support enrollment growth. While the pandemic accelerated this trend, the increasing demand for online programs has been documented for nearly a decade.

It is with this in mind that in 2022 RNL conducted a set of research studies to help institutions understand what they must do in order to thrive in the online education space.

Our 2022 Online Student Recruitment Report focused on understanding the expectations, search patterns, and decision making priorities of today's online student. The report was based on a survey of more than 1,600 prospective online students who indicated that were or had in the last 12 months planning on enrolling in a fully online, credit-bearing, program.

As a companion to that student-focused research, RNL presents this ***2022 Online Program Marketing and Recruitment Practices Report***. This report is based on a survey of more than 100 marketing and recruitment leaders who have primary responsibility for the fully online, credit-bearing programs offered by their institutions. Eligible institutions could offer either degrees or certificates and other credentials, but only if they award academic credit. Institutions that offer online courses but not online programs were not eligible. For more details about the survey, see page 27.

The report seeks to profile how institutions offering fully online programs across the country are marketing to prospective students. Further, it examines technques used to recruit and cultivate them. The goal is to present an accurate snapshot of what is being done today, with an eye on what aspects are already at the level of "best practice" and which areas will likely need to receive additional focus in order to benefit from recent growth trends.

This report benefits from the fact that at many points we are able to assess the extent to which institutions offering fully online programs are using tactics, strategies, messaging, and program structures that meet the expectations of today's online student (as represented in our *Online Student Recruitment Report*).

OVERALL FINDING: Institutions need to invest to meet student expectations

In analyzing the data gathered among marketing and recruitment leaders and comparing those findings to online student expectations, it is clear that institutions have to invest significantly in their marketing and recruitment efforts in order to successfully attract the growing number of online students to their programs. Why? Because with each succeeding semester or term, more institutions are offering online programs, providing a level of unparalleled choice to these demanding students.

Institutions also need to ensure that their outreach and cultivation tactics and strategies align with the expectations of students:

✓ **They need to be on the right platforms and channels** (most but not all digital).

✓ **They need to be available when students make contact** (after traditional business hours).

✓ **They need to meet response times expected by students** (minutes rather than hours or days).

Online programs have become an essential component of the enrollment growth strategy

Many institutions have embraced online expansion. In fact, each term RNL helps dozens of schools "stand up" new online programs. Other institutions have determined that they will not be expanding their online capabilities. For some this will work; for others, recent enrollment trends by instructional format (which reflect student preferences) will force such institutions to shrink in the near future. In order to clarify the importance of online programming in enrollment health, RNL analyzed IPEDS fall enrollment data by format since 2012 and present the following conclusions.

Undergraduate enrollment contraction has been mitigated by online and partially online students

Consider that between 2012 and 2019 (setting aside the anomaly that was 2020) there were:

743,162

additional students who chose to enroll in programs offering online courses[1]

972,136

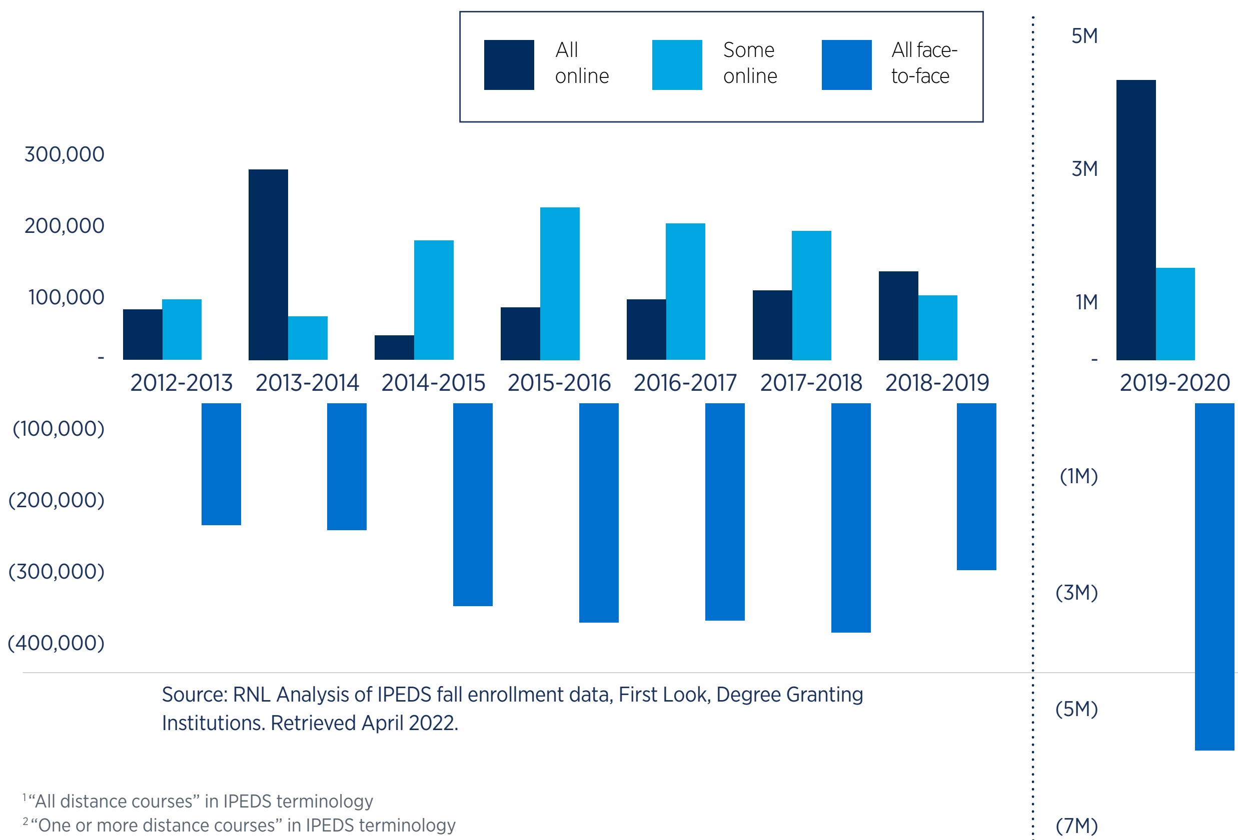
additional students who chose to enroll in programs offering some online courses[2]

2.1M

fewer students who chose to enroll in programs offering only classroom courses[3]

Table 1 presents year-over-year (YoY) trends in undergraduate enrollment. Since 2012, all YoY undergraduate growth has been derived from students who choose to enroll in either all online courses or some online courses. At the same time, there has been dramatic annual contraction among students who choose to enroll in all classroom courses. The open question is the impact that exposure to online (and emergency remote) learning during the pandemic will have on undergraduate enrollment.

TABLE 1: UNDERGRADUATE FALL ENROLLMENT BY FORMAT



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

[1] "All distance courses" in IPEDS terminology
[2] "One or more distance courses" in IPEDS terminology
[3] "No distance courses" in IPEDS terminology

Graduate enrollment growth has been driven entirely by online and partially online students

Unlike undergraduate enrollment (which has been in decline since 2014) graduate enrollment has grown each year between 2012 and 2020. Consider that between 2012-19 there were:

414,644

additional students who chose to enroll in programs with all online courses

290,957

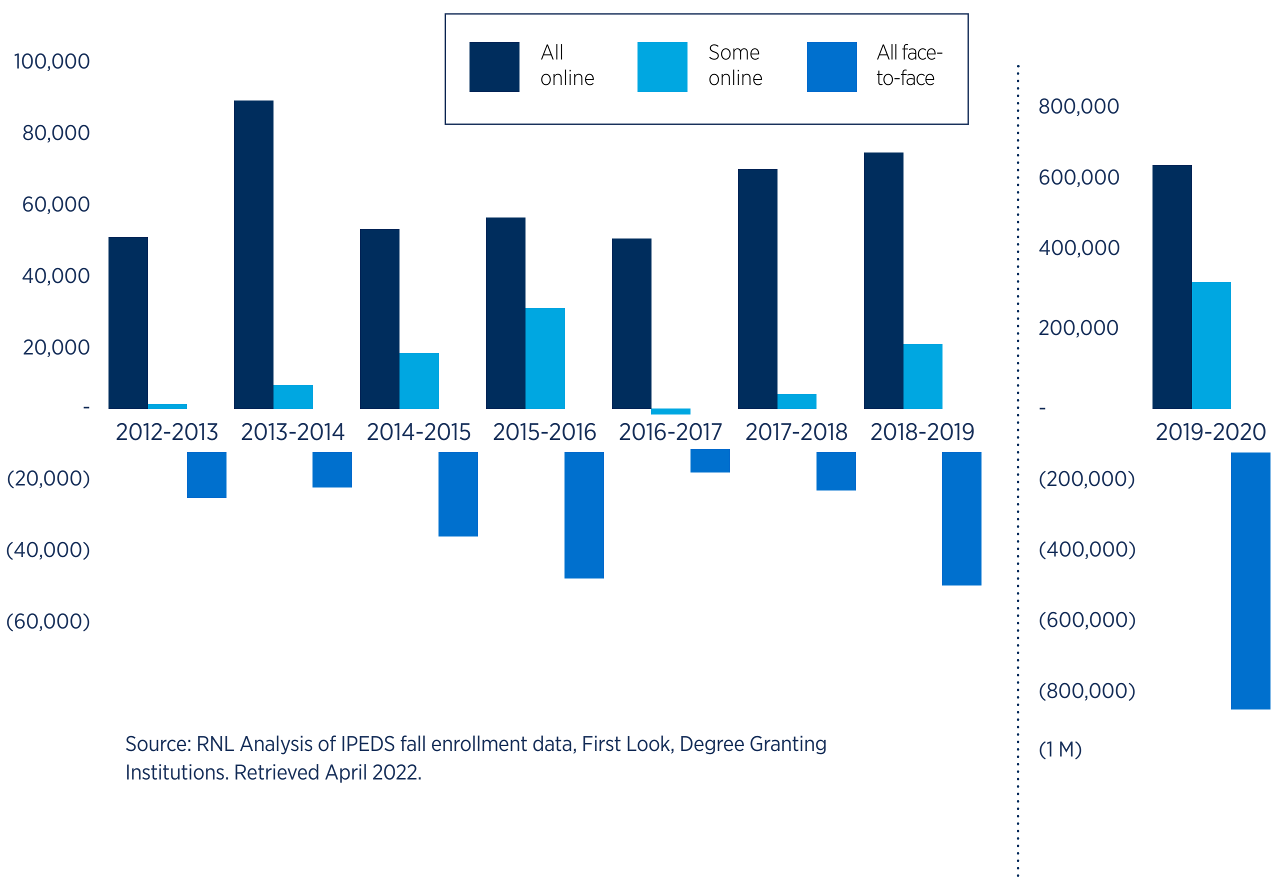
additional students who chose to enroll in programs with some online courses

208,586

fewer students who chose to enroll in programs with only classroom courses

Table 2 presents year-over-year growth in graduate student enrollment. Since 2012, all growth has been derived from students who opt to enroll in programs with all online courses and to a lesser extent to those who opt to enroll in programs with some online courses. Concurrently, each year has seen dramatic contraction among students opting to enroll in programs offering only classroom courses. It is also noteworthy that fully online is by far a larger growth driver than partially online.

TABLE 2: GRADUATE YEAR-OVER-YEAR FALL ENROLLMENT CHANGE BY FORMAT



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

THE FOLLOWING PAGES PRESENT DATA AND FINDINGS ASSOCIATED WITH THESE SIX AREAS.

1. Online Program Overview
2. Marketing and Recruitment Operations
3. Strategic and Annual Planning
4. Marketing: Focus Areas, Budgets, and Strategies
5. Recruitment
6. Admissions

1 ONLINE PROGRAM OVERVIEW

Institutional practices associated with online programs vary considerably among institutions in the United States. In an effort to better understand issues related to the magnitude of online offerings, the effects of the pandemic on increasing the permanent number of online offerings, and where institutions are focusing their online programming, we asked a series of questions of our respondents.

KEY TAKEAWAYS

1) Public institutions are offering more online programs than are private nonprofit institutions.

2) Public institutions are also somewhat more likely to have added more permanently online (meaning not emergency remote) programs than private institutions.

3) Institutions of both types are more heavily focusing their online programming at the graduate level than the undergraduate level, albeit with public institutions far more frequently offering ANY undergraduate online degree programs.

TABLE 3: NUMBER OF ONLINE PROGRAMS OFFERED

TOTAL NUMBER OF ONLINE PROGRAMS	Public	Private
1-5	28%	50%
5-10	13%	11%
11-15	4%	11%
More than 15	56%	28%

TABLE 4: NUMBER OF NEW ONLINE PROGRAMS SINCE PANDEMIC BEGAN

NUMBER OF NEW ONLINE PROGRAMS	Public	Private
0	7%	13%
1-2	26%	41%
3-4	28%	17%
5-6	11%	17%
7-8	13%	2%
9-10	0%	0%
More than 10	15%	9%

TABLE 5: AVAILABLE INSTRUCTIONAL FORMATS

DEGREE TYPE	Public	Private
Undergraduate degrees	78%	46%
Graduate degrees	85%	96%
Non-degree (credit-bearing) credentials	67%	50%

2 ONLINE PROGRAM MARKETING AND RECRUITMENT OPERATIONS

How do institutions configure their marketing and recruitment operations for online programs? As online programming was developed and expanded over the last decade, many institutions decentralized both program development and the marketing, recruitment, and admissions processes. This provided the freedom to experiment, to innovate, and to grow. As online education has become increasingly a central and essential element in enrollment growth, it is important to understand where responsibility lies and to think carefully about whether programs that are essential to institutional growth should be out of the purview of centralized control.

KEY TAKEAWAYS

1) Undergraduate online degree programs (typically smaller in number than at the graduate level) predominantly work with centralized offices to market and recruit online students.

2) Graduate online degree programs (typically larger in number than undergraduate) are far more likely to have the marketing and recruitment functions either fully decentralized or shared with the central offices.

3) More than 20 percent of both public and private institutions are working with an OPM vendor, with a large majority of agreements including a revenue share.

4) Between 11 and 14 percent of institutions work with other types of partners on their online programs—and more than 60 percent are doing this on their own.

TABLE 6: RESPONSIBILITY FOR ONLINE PROGRAM MARKETING

RESPONSIBILITY FOR MARKETING	Undergraduate Degree	Graduate Degree	Non-Degree
Centralized at institutional level	71%	46%	48%
Centralized in a school/unit focused on online programs	16%	20%	12%
Shared between multiple parties	41%	46%	40%
Decentralized in each school/department/program	10%	17%	16%

TABLE 7: RESPONSIBILITY FOR ONLINE PROGRAM RECRUITMENT

RESPONSIBILITY FOR RECRUITMENT	Undergraduate Degree	Graduate Degree	Non-Degree
Centralized at institutional level	70%	47%	47%
Centralized in a school/unit focused on online programs	22%	20%	16%
Shared between multiple parties	37%	42%	31%
Decentralized in each school/department/program	11%	20%	24%
A third-party call center	5%	10%	5%

TABLE 8: WORKING WITH OPMS AND OTHER THIRD-PARTY PARTNERS

PARTNERSHIP ARRANGEMENT	Public	Private
OPM with revenue share	15%	18%
OPM with fee for service	6%	6%
Other third-party	11%	14%
None	69%	61%

TABLE 9: SERVICES MANAGED BY OPM

SERVICES	All Institutions
Recruitment	86%
Marketing creative	76%
Media placement and strategy	71%
Market research	71%
Applicant cultivation	52%
Student success coaching	33%
Instructional design	24%
Admission	19%

3 ONLINE PROGRAM STRATEGIC AND ANNUAL PLANNING

Benjamin Franklin famously said, "a failure to plan is a plan to fail." As more and more colleges and universities add online programs (often in order make up shortfall elsewhere), the level of competition for students will become increasingly challenging. As other student populations contract due to demographics or other factors, the strategic importance of online growth will increase even more.

To what extent are institutions taking a sophisticated and strategic approach to planning? At the tactical level it is critically important that institutions have a specific marketing plan for online programs (and ideally a specific plan for each program). At a strategic level, institutions need to be sure that they are incorporating online program plans into their strategic enrollment plans. Finally, as enrollment tightens elsewhere, institutions need to be sure that their online strategy is included in their institution-wide, multiyear strategic plans.

KEY TAKEAWAYS

1) Among both public and private institutions, online programs are least likely to be included in annual marketing plans, in comparison with both strategic enrollment plans and institution-wide strategic plans.

2) Public institutions are most frequently (81 percent) including online programs in their institution-wide strategic planning process, while they are slightly less likely to be including online programs in their strategic enrollment plans. They are by far the least likely to employ annual marketing plans.

3) Private institutions are most frequently (83 percent) including online programs in their strategic enrollment planning process, while they are slightly less likely to be including online programs in their institution-wide strategic plan. About one-quarter do not use annual marketing plans.

4) Among institutions that employ annual marketing plans, only half include specific metrics and strategies for each program, while the remainder create more general plans.

TABLE 10: ONLINE PROGRAMS INCLUDED IN INSTITUTION STRATEGIC PLAN

ONLINE INCLUDED	Public	Private
Yes	81%	78%
No	17%	9%
Do not know	0%	9%
Do not have a strategic plan	2%	4%

TABLE 11: ONLINE PROGRAMS INCLUDED IN STRATEGIC ENROLLMENT PLAN

ONLINE INCLUDED	Public	Private
Yes	75%	83%
No	11%	9%
Do not have a strategic enrollment plan	13%	9%

TABLE 12: ONLINE PROGRAMS INCLUDED IN ANNUAL MARKETING PLAN

ONLINE INCLUDED	Public	Private
Yes, for online undergraduate	30%	17%
Yes, for online graduate	30%	41%
Yes , online is included in institution-wide plan	25%	48%
No, plan does not specifically include online	38%	28%

TABLE 13: ELEMENTS OF ONLINE ANNUAL MARKETING PLANS

ELEMENTS IN ANNUAL ONLINE MARKETING PLAN	Undergraduate Degree	Graduate Degree	Non-Degree
Specific goals (inquiries, applicants, enrollments) for each online program	44%	46%	29%
Marketing tactics specific to each online program	43%	50%	22%

4 MARKETING: FOCUS AREAS, BUDGETS, AND STRATEGIES

How are institutions that offer online programs marketing those programs? As more institutions add online programs to their offerings, it is important to understand the focus of marketing efforts, how much is being spent, which channels institutions invest in, and what strategies they use. It is also important to assess the extent to which current practice among institutions aligns with the expectations and processes of prospective online students as reported in RNL's *2022 Online Student Recruitment Report*. It is with this in mind that respondents to this survey were asked an extensive series of questions about the strategies and tactics they are employing:

KEY TAKEAWAYS

1) Institutions offering undergraduate online degrees are putting the largest proportion of their marketing dollars on brand awareness, while those offering online graduate degrees are putting the bulk of their funds on specific program promotion.

2) With little differentiation by either sector or level of online program, the largest proportion of online program marketing dollars is spent on digital advertising, while search engine optimization (SEO)—likely of even greater importance—is a distant second as a proportion of the total budget.

3) The overall average annual marketing budget is $1.09 million dollars, with little differentiation between the average among public and private institutions.

4) An average of 581 new students were enrolled in the last year among responding institutions—implying that an average of $1,879 is being spent to recruit each new student.

5) The specific channels and tactics being used by institutions align well with the channels and strategies most frequently used by prospective online students.

TABLE 14: FOCUS AREAS OF ONLINE PROGRAM MARKETING

BROAD ALLOCATION OF ONLINE MARKETING BUDGET	Undergraduate Degree	Graduate Degree	Non-Degree
Brand awareness	45%	30%	34%
Specific program promotion	37%	44%	41%
School/department promotion	18%	26%	25%

TABLE 15: BROAD APPORTIONMENT OF ONLINE PROGRAM MARKETING BUDGET

ONLINE MARKETING BUDGET AREA	All Institutions
Digital advertising (Google ads, social media ads, etc.)	53%
Search engine optimization/organic lead generation	17%
Traditional media (radio, TV, billboards, etc.)	15%
Events (face to face)	5%
Events (virtual)	4%
Corporate/military/other partnerships	1%
Other	5%

Note: There were no significant differences by either level or sector.

TABLE 16: TOTAL MARKETING BUDGET

ANNUAL MARKETING BUDGET	All Institutions
Average	$1,092,214
Low	$2,000
High	$8,000,000
Number more than $1M	12 of 37

Public Institution Average

$1,044,559

Private Institution Average

$1,137,722

TABLE 17: NEW ONLINE STUDENTS ATTRIBUTABLE TO MARKETING BUDGET (2021-22)

Average	Low	High
581	10	7,000

TABLE 18: MARKETING AND ADVERTISING STRATEGIES USED TO ATTRACT ONLINE STUDENTS

STRATEGIES USED IN MARKETING ONLINE PROGRAMS	Undergraduate Degree	Graduate Degree	Non-Degree
Ads on Facebook or other social media sites	91%	89%	89%
Search engine optimization (SEO)	79%	80%	75%
Ads on search engines like Google	75%	77%	85%
Online display advertising	74%	77%	75%
Organic social media	67%	73%	75%
Retargeted ads	58%	61%	60%
Email blasts to purchased lists	54%	60%	64%
Video ads	49%	51%	51%
Print media ads	44%	37%	43%
Billboard, bus, or other outdoor advertising	44%	43%	49%
Direct mail campaigns	40%	41%	36%
Radio ads	37%	35%	40%
Outbound phone calling campaigns	25%	22%	34%
Television ads	25%	23%	23%
Calls to purchased lists	18%	18%	19%

TABLE 19: ONLINE STUDENTS—FIRST SOURCES USED FOR ONLINE SEARCH

The results for this table are from the *RNL 2022 Online Student Search Report* and show how prospective online students search for programs.

FIRST SOURCES IN ONLINE PROGRAM SEARCH	Undergraduate Degree	Graduate Degree	Non-Degree
Search engines	71%	68%	80%
College search sites	62%	62%	49%
Ads on social media	47%	59%	45%
Someone I know	42%	44%	45%
Ads on websites	43%	42%	37%
Ads on streaming TV	41%	38%	29%
Ads on broadcast or cable TV	37%	40%	31%
Program ranking websites	29%	38%	31%
Printed view books, brochures, etc.	30%	29%	25%
Ads in newspapers, magazines, etc.	27%	30%	21%
Printed rankings guides, etc.	26%	25%	21%
Ads on streaming radio	23%	21%	14%
Billboards and other outdoor ads	23%	19%	15%
Ads on local broadcast radio	21%	20%	11%
Ads on podcasts/other streaming audio	21%	15%	14%

TABLE 20: LEAD GENERATION STRATEGIES USED TO ATTRACT ONLINE STUDENTS

INQUIRY GENERATION STRATEGIES	Undergraduate Degree	Graduate Degree	Non-Degree
Website "information request" form	91%	92%	94%
Landing pages for each online program	70%	73%	75%
Free application	53%	51%	51%
Use of video on program pages/social media	53%	54%	55%
Web scheduling tool for appointments	47%	48%	57%
Live/AI-driven chat on website	39%	34%	36%
Referral program	23%	27%	30%
Participation in Yellow Ribbon Program for veterans	21%	25%	19%

5 RECRUITMENT

How are institutions that offer online programs recruiting students? Understanding the size of the typical recruitment team, who is responsible for first contact, the time it takes to respond to inquiries, the pace of ongoing contact and cultivation, and the hours of operation of the online program recruitment office are among the most important things for institutions to examine. It is also important to assess the extent to which current practices align with the expectations of prospective online students as reported in RNL's *2022 Online Student Recruitment Report*. It is with this in mind that respondents were asked a number of questions about the structure and practices of their online program recruitment operations.

KEY TAKEAWAYS

1) There is significant divergence among public and private institutions regarding the average size of the team responsible for online program recruitment, with the public institution average twice the size of the private average.

2) There is considerable differentiation between undergraduate and graduate degree programs in who responds to inquiries first, although both levels most frequently rely on an admissions counselor or recruiter.

TABLE 21: STAFF SIZE DEDICATED TO ONLINE STUDENT RECRUITMENT AND ADMISSION

FULL-TIME STAFF DEDICATED TO ONLINE RECRUITMENT AND ADMISSIONS IN 2021-2022	Public	Private	All
Average staff size	14	7	10
Lowest staff size	0	.25	0
Highest	130	110	130

TABLE 22: "FIRST RESPONDER" TO ONLINE PROGRAM INQUIRIES

STAFF MEMBER	Undergraduate Degree	Graduate Degree	Non-Degree
Admissions counselor/recruiter	78%	66%	53%
Program leader/coordinator	19%	34%	21%
Institutional level internal call center	43%	23%	17%
Faculty member	14%	16%	3%
External call center	10%	13%	3%
Whoever is available	3%	8%	9%
Other	6%	6%	9%

TABLE 23: CHANNELS USED FOR FIRST RESPONSE

CHANNEL	Undergraduate Degree	Graduate Degree	Non-Degree
Personalized email	96%	98%	98%
Phone	80%	78%	78%
Text message	67%	59%	63%
Direct mail	38%	40%	33%

TABLE 24: ONLINE STUDENTS—PREFERRED METHOD OF CONTACT FROM ONLINE PROGRAMS

CONTACT METHOD	Undergraduate Degree	Graduate Degree	Non-Degree
Personalized email	53%	57%	53%
Text message	20%	15%	17%
Phone call	13%	13%	17%
Material mailed to home	7%	6%	7%
Non-personalized email	6%	7%	6%
Digital or social media advertising	1%	3%	1%

TABLE 25: TYPICAL TIMING OF FIRST RESPONSE

RESPONSE TIME BY CHANNEL	Undergraduate Degree	Graduate Degree	Non-Degree
Personalized Email			
Immediately	33%	34%	33%
Within 3 hours	9%	12%	8%
Within 24 hours	42%	40%	42%
Within 3 days	11%	8%	12%
Within a week	2%	4%	2%
More than a week	0%	0%	2%
Text Message			
Immediately	6%	6%	4%
Within 3 hours	19%	19%	18%
Within 24 hours	25%	18%	27%
Within 3 days	13%	9%	13%
Within a week	4%	6%	2%
More than a week	0%	1%	0%
Phone			
Immediately	16%	12%	13%
Within 3 hours	8%	9%	9%
Within 24 hours	28%	33%	33%
Within 3 days	18%	17%	15%
Within a week	6%	4%	4%
More than a week	4%	3%	4%

TABLE 26: ONLINE STUDENTS—EXPECTATIONS FOR RESPONSE TIME

RESPONSE TIME BY CHANNEL	Undergraduate Degree	Graduate Degree	Non-Degree
Personalized Email			
Immediately	27%	19%	17%
Within 3 hours	21%	20%	20%
Within a day	29%	26%	33%
More than 1 day	23%	36%	30%
Text Message			
Immediately	27%	24%	20%
Within 3 hours	25%	27%	35%
Within a day	25%	23%	25%
More than 1 day	23%	27%	21%
Phone			
Immediately	29%	24%	25%
Within 3 hours	19%	20%	20%
Within a day	26%	26%	28%
More than 1 day	26%	31%	27%

Why is meeting these expectations important?

The majority of prospective online students are likely to enroll in the online program that responds to their inquiry first. As these results from *RNL's 2022 Online Student Recruitment Report* show, more than 60 percent of undergraduate- and graduate-degree seeking students were definitely or likely to enroll at the program that responded first, and only about one in five said that timing was not as important of a factor in their decision.

TABLE 27: ONLINE STUDENTS—LIKELIHOOD OF ENROLLING IN ONLINE PROGRAM THAT RESPONDS TO INQUIRY FIRST

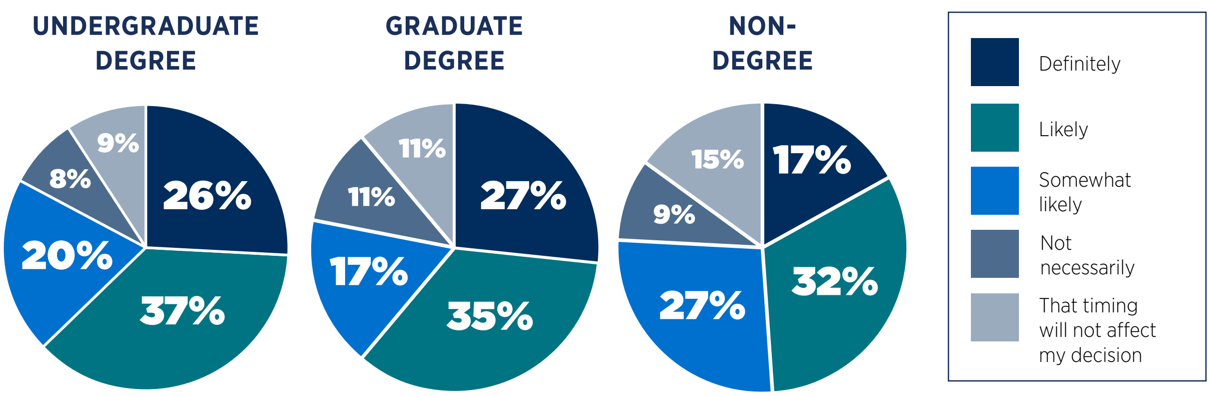


TABLE 28: RECRUITER AVAILABILITY OUTSIDE TRADITIONAL BUSINESS HOURS

RECRUITMENT STAFF AVAILABLE OUTSIDE BUSINESS HOURS (8 A.M. – 5 P.M.)	Public	Private
Available	37%	30%
Not available	63%	70%

TABLE 29: ONLINE STUDENTS—PREFERRED TIME FOR CONTACT FROM ONLINE PROGRAMS

TIME	Undergraduate Degree	Graduate Degree	Non-Degree
Early morning (before 9 a.m.)	13%	11%	10%
Morning (9 a.m. - noon)	44%	44%	40%
Afternoon (noon - 5 p.m.)	32%	28%	32%
Evening (5-10 p.m.)	10%	16%	17%
Late evening (after 10 p.m.)	1%	0%	0%

TABLE 30: CHANNELS USED FOR ONGOING COMMUNICATION

CHANNEL	All Institutions
Personalized email	98%
Text message	64%
Phone	76%
Direct mail	40%

TABLE 31: TYPICAL FREQUENCY FOR ONGOING COMMUNICATIONS

CHANNEL	Daily	Weekly	Every two weeks	Monthly	Less than monthly
Personalized email	9%	58%	23%	8%	1%
Text message	2%	42%	24%	18%	14%
Phone	7%	42%	22%	22%	8%
Direct mail	0%	13%	17%	47%	23%

TABLE 32: ONLINE STUDENTS—PREFERRED FREQUENCY OF FOLLOW UP FROM ONLINE PROGRAMS

TIME FOR FOLLOW UP	Undergraduate Degree	Graduate Degree	Non-Degree
Daily	11%	17%	7%
2-3 times per week	38%	33%	33%
Once per week	29%	29%	35%
Every other week	12%	11%	14%
Once a month	10%	9%	12%

TABLE 32: ONLINE STUDENTS—PREFERRED METHOD FOR INFORMATION AND NOTIFICATIONS

METHOD FOR INFORMATION AND NOTIFICATIONS	Undergraduate Degree	Graduate Degree	Non-Degree
Deadline reminders			
Email	60%	60%	59%
Telephone	18%	20%	19%
Text	19%	17%	21%
Social media app message	3%	3%	1%
Details about my application, such as missing documents or status			
Email	55%	50%	60%
Telephone	27%	32%	22%
Text	17%	15%	16%
Social media app message	2%	3%	3%
Acceptance/rejection notification			
Email	57%	51%	68%
Telephone	23%	22%	11%
Text	17%	21%	18%
Social media app message	3%	5%	3%
Check-ins from my admissions representative			
Email	51%	49%	54%
Telephone	22%	21%	20%
Text	20%	22%	22%
Social media app message	7%	9%	4%
Links to social media/website content about my program?			
Email	55%	53%	64%
Telephone	18%	16%	12%
Text	18%	18%	15%
Social media app message	8%	13%	10%
Webinar or live chat invitations			
Email	54%	51%	59%
Telephone	18%	21%	9%
Text	21%	18%	24%
Social media app message	7%	9%	8%

6 ADMISSION

To what extent are current admissions policies and practices aligning with the expectations of online students? This is of fundamental importance to institutional health given that an institution can have the best programs, do the best marketing, and respond to inquiries and questions efficiently, but then lose the student if it takes too long to admit them. It is with this in mind that we wanted to learn more about how institutions are processing applications and making admissions decisions.

KEY TAKEWAYS

1) Undergraduate online program admissions decisions are far more likely to be made in a central admissions office than at the graduate level.

2) Graduate online admissions processes are distributed across stakeholders at the institution and likely result in longer decision timelines than is acceptable to online graduate students.

3) The proportion of both undergraduate and graduate programs that offer admission within one week (the preference of almost 75 percent of students) is not matching student expectations.

TABLE 33: STAFF RESPONSIBLE FOR ADMITTING ONLINE STUDENTS

DEGREE	Admissions department	Admissions review committee	Program faculty	Academic program coordinators	A mix of these stakeholders
Undergraduate	58%	3%	8%	6%	25%
Graduate	14%	5%	23%	10%	48%

TABLE 34: ROLLING ADMISSION ONLINE PROGRAMS

DEGREE	Have rolling admission
Undergraduate	76%
Graduate	89%

TABLE 35: TYPICAL TIME TO ACCEPTANCE—ROLLING ADMISSION

DEGREE	Fewer than 24 hours	24 hours	1-3 days	4-7 days	More than 7 days	Longer than a week
Undergraduate	8%	10%	19%	27%	11%	24%
Graduate	6%	3%	28%	21%	19%	23%

Note: The results for Tables 33-36 are for all institutions.

TABLE 36: TYPICAL TIME TO ACCEPTANCE—FIXED ADMISSION DEADLINE

DEGREE	Within 3 days	Within 1 week	Within 2 weeks	Within 3 weeks	4-8 weeks	More than 2 months
Undergraduate	24%	10%	24%	12%	27%	3%
Graduate	18%	14%	26%	20%	16%	7%

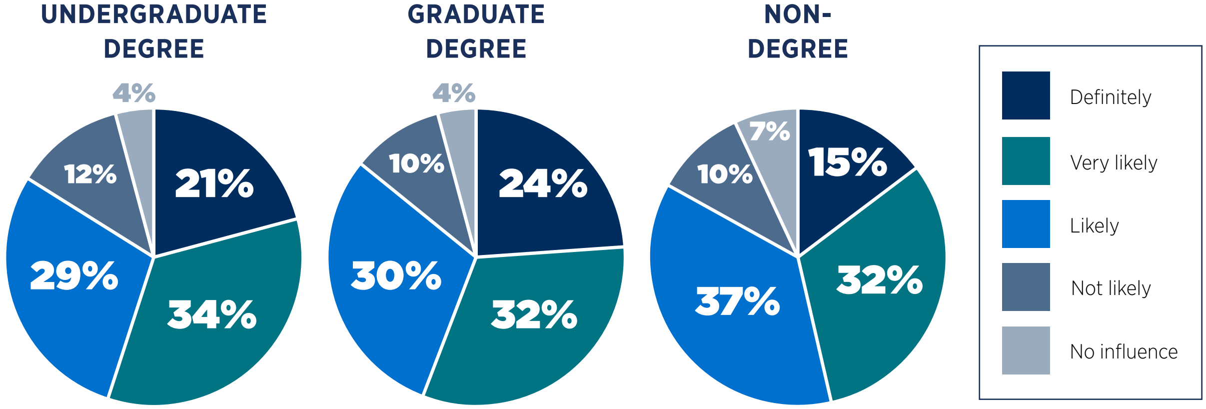
TABLE 37: ONLINE STUDENTS— EXPECTED TIMING OF ADMISSIONS DECISION

TIMEFRAME	Undergraduate 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 meeting admission timing expectations important?

As with responding to inquiries, prospective online students are much more likely to enroll at the program that admits them first, especially those seeking degrees.

TABLE 38: ONLINE STUDENTS—LIKELIHOOD OF ENROLLING IN ONLINE PROGRAM THAT ADMITS STUDENT FIRST



5 OVERALL TAKEAWAYS FOR ONLINE MARKETING AND RECRUITMENT LEADERS

1) **Speed is critical.** Prospective online students at all levels expect responses to their questions and admissions decisions on a timeline that is unprecedented. While the institutions responding to this survey are doing a good job meeting expected response times, there is considerable variance between expected admissions timelines and current practices.

2) **Focus on digital marketing.** Online students are driven more by the program than the institution. This means less loyalty to local brands and the inclusion of programs near and far when searching. The importance that online students put on cost, time to complete, and match between program and their interests have considerable implications for SEO strategies. The predominance of social media advertising among respondents aligns well with student search practices, but institutions must be acutely attuned to changes in those practices.

3) **Find every dollar you can for marketing your online programs.** Just when you think something is working, search patterns change. More and more institutions are finding that more traditional media—when used in collaboration with digital media channels—is showing lift. This demands more being spent on marketing in many cases. As institutions begin to see that online enrollment is now central to institutional health, these resources will have to be found.

4) **Think strategically about what online programs to add.** More institutions than ever before are adding new online programs as they seek to make up shortfalls elsewhere. Respondents to this survey indicate that public institutions are adding them both faster and with more emphasis on undergraduate degree programs. As institutions understand that online is essential to institutional health, they are simultaneously entering an increasingly competitive market.

5) **Create a centralized online graduate marketing and recruitment operation.** While the majority of respondents are managing undergraduate online marketing and recruitment within centralized operation, this is not so at the graduate level. Even if there are challenges with these undergraduate operations (typically having heavily focused expertise on classroom programs), a centralized online marketing and recruitment operation sets an institution up for success when competing with a set of institutions that may be significantly more focused.

ABOUT THE SURVEY

Data in this report reflect responses from 102 colleges and universities. Fifty-four percent of respondents represent public institutions, and 46 percent represent private institutions. No for-profit institutions participated in the survey, although they were not barred from doing so.

Respondents participated in a national electronic survey administered in July and August 2022. The survey link was emailed to enrollment and admissions officers at accredited, degree-granting institutions across the United States.

Standard descriptive statistics (such as sample means) were used to analyze the results of the poll for central tendency and variation. Due to the relatively small sample size, the results should be read as indicators.

Type of Institution

PUBLIC INSTITUTION
54%

PRIVATE INSTITUTION
46%

Areas of Responsibility

MARKETING ONLINE PROGRAMS
20%

RECRUITMENT/ ENROLLMENT FOR ONLINE PROGRAMS
25%

BOTH MARKETING AND RECRUITMENT/ENROLLMENT FOR ONLINE PROGRAMS
55%

Types of Online Programs Available

UNDERGRADUATE DEGREES
62%

GRADUATE DEGREES
88%

NON-DEGREE CREDENTIALS
58%

WE ONLY OFFER ONLINE CLASSES, NOT FULL CREDENTIALS
2%

Total Number of Online Programs

1-5
38%

5-10
12%

11-15
7%

MORE THAN 15
43%

ABOUT THE SURVEY SPONSOR

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.

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