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# **The Strategic Enrollment Planning Imperative: Higher Education Past and Present**

Wes Butterfield, Chief of Consulting Services, RNL

# Agenda

1. Enrollment is in decline and demographics are shifting
2. The economics of higher education
3. The retention and completion imperative
4. Student behaviors and changes in the investment of recruitment activities



The power for creating a better future is contained in the present moment: You create a good future by creating a good present.

**Eckhart Tolle**

Transferred from [en.wikipedia](#)

# Trends That Impact SEP

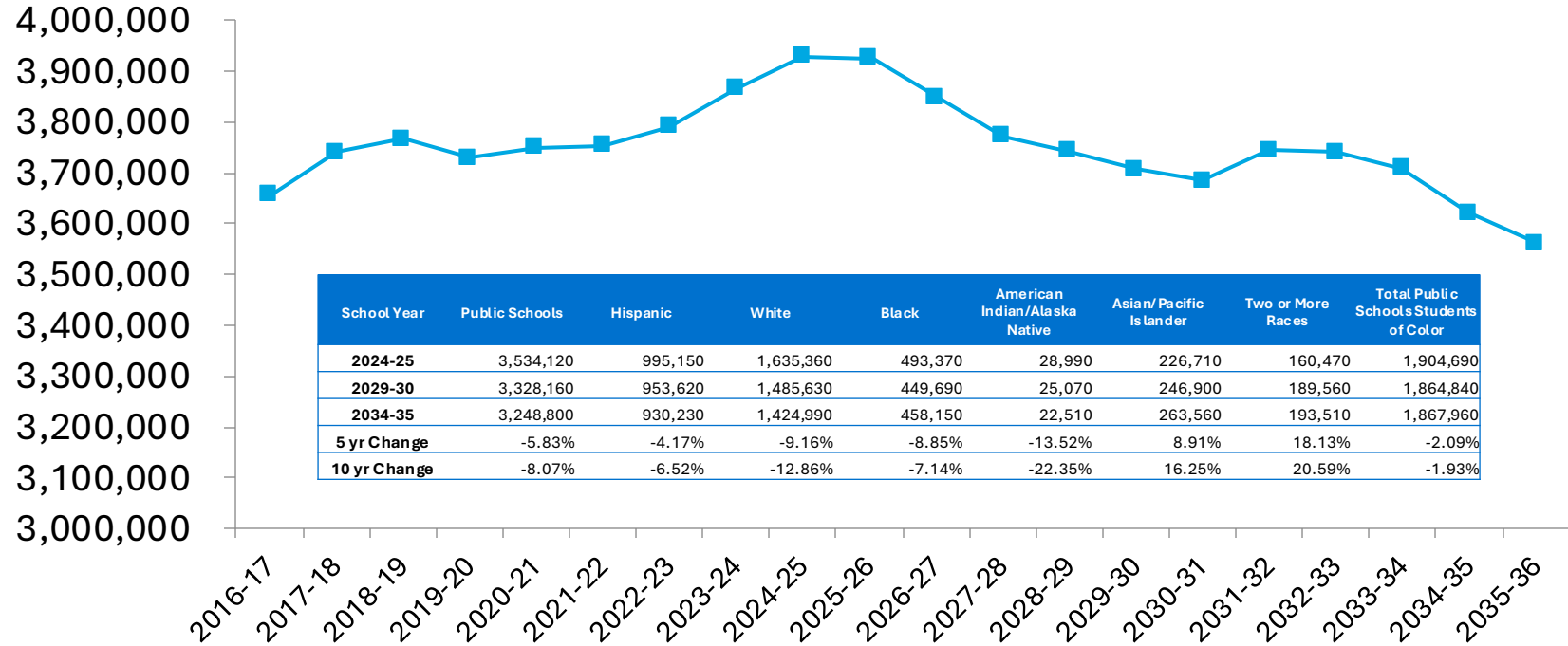
1. Total enrollment is declining, and demographics are shifting.
2. Economics of Higher Education in the U.S. are strained.
3. Retention and completion is critical to long term goals.
4. Student behavior is causing shifts in recruitment activities and where to invest.

**Enrollment is in decline  
and demographics are  
shifting**



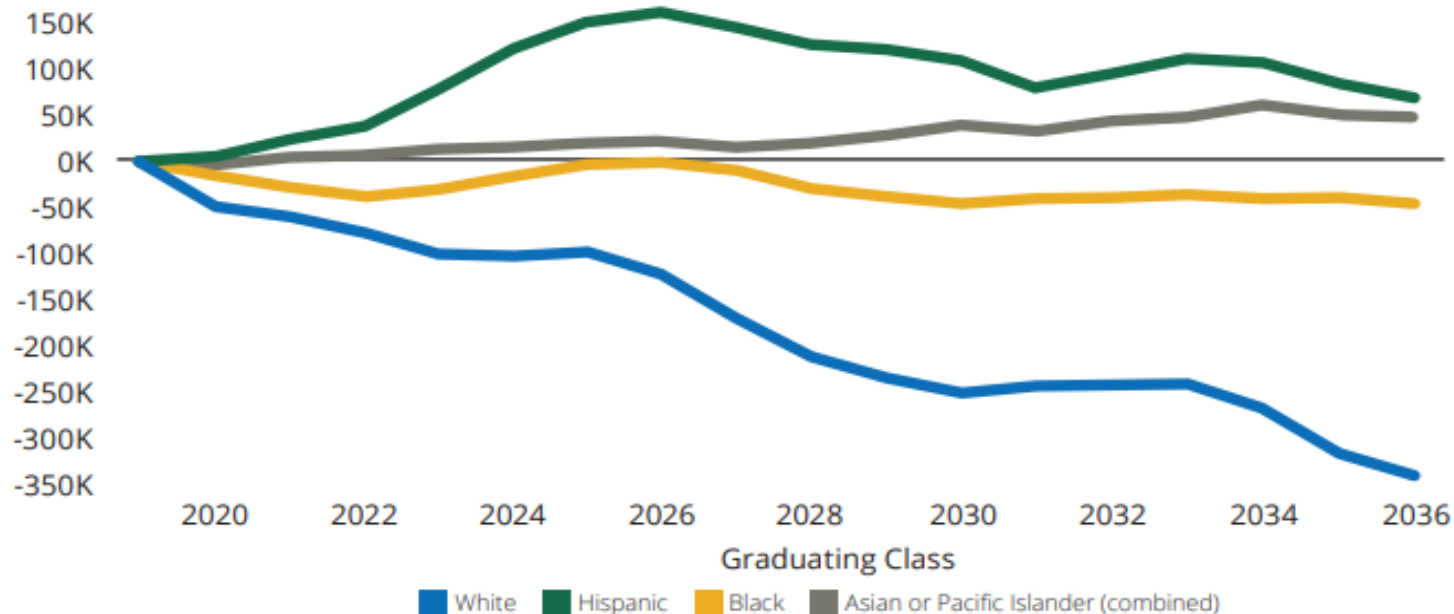
# Projected Change in High School Graduates

## United States 2017-36



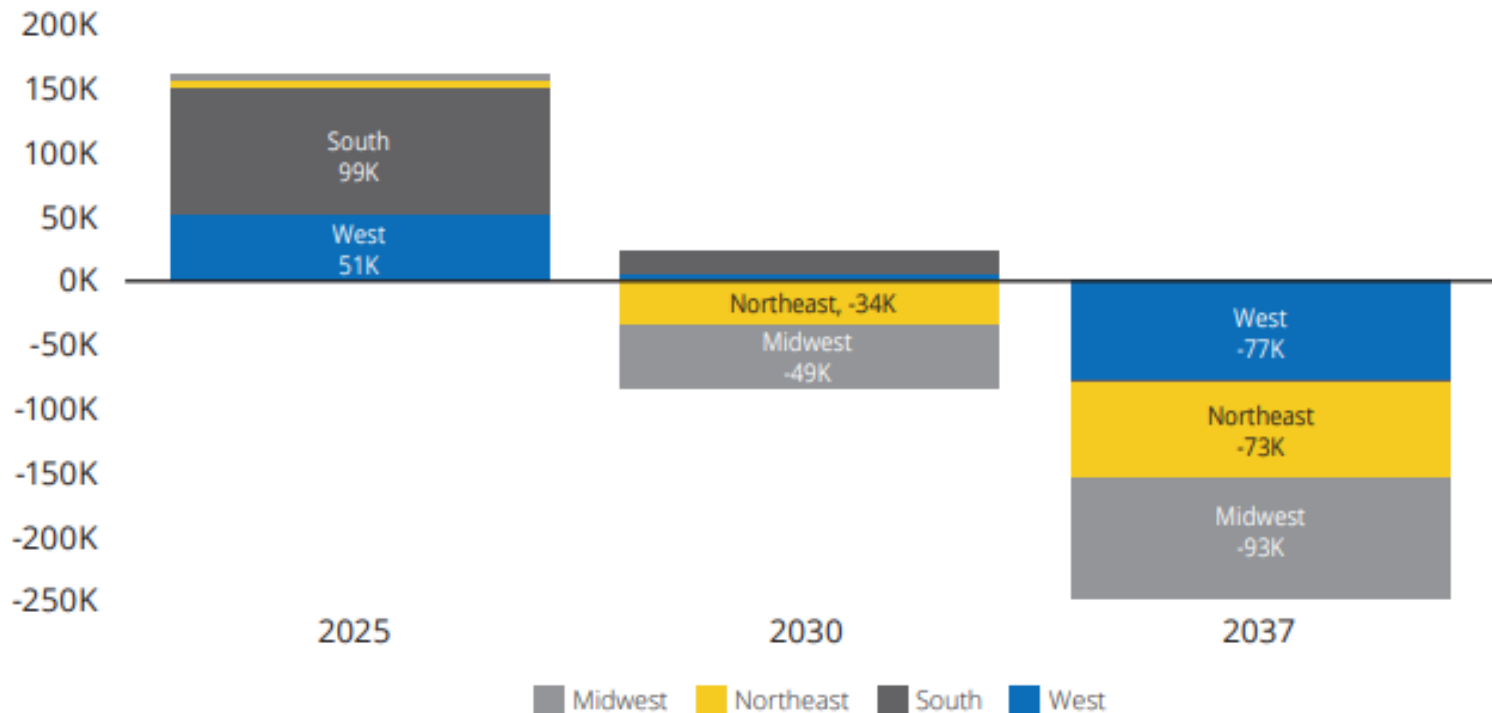
Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)

# Projected Change in Number Among U.S. Public High School Graduates Compared to 2019



Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. WICHE projections and analysis.  
Notes: Showing White non-Hispanic, Hispanic of any race, Black non-Hispanic and Asian/Pacific Islander (combined) non-Hispanic. Figure 5a shows additional race categories.

# Regional Contribution to National Increase or Decrease

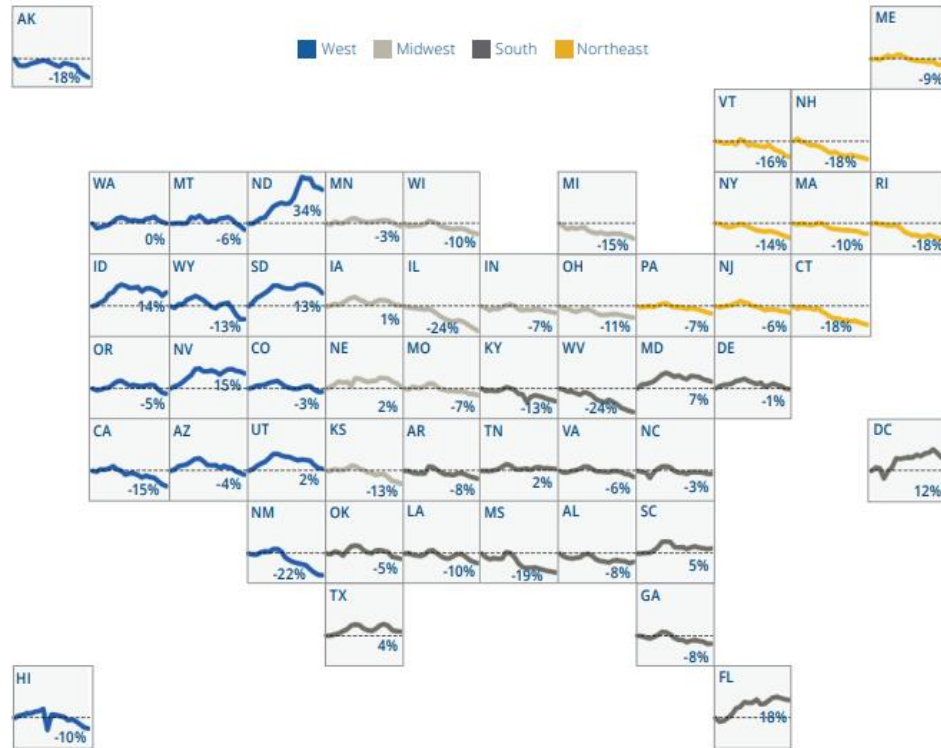


Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. WICHE projections and analysis.

Note: See Figure 2a for states included in each region.



# State-by-State Projected Percent Change from Class of 2019 to 2037, Grand Total of Public & Private Schools



Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, [www.knocking.wiche.edu](http://www.knocking.wiche.edu)

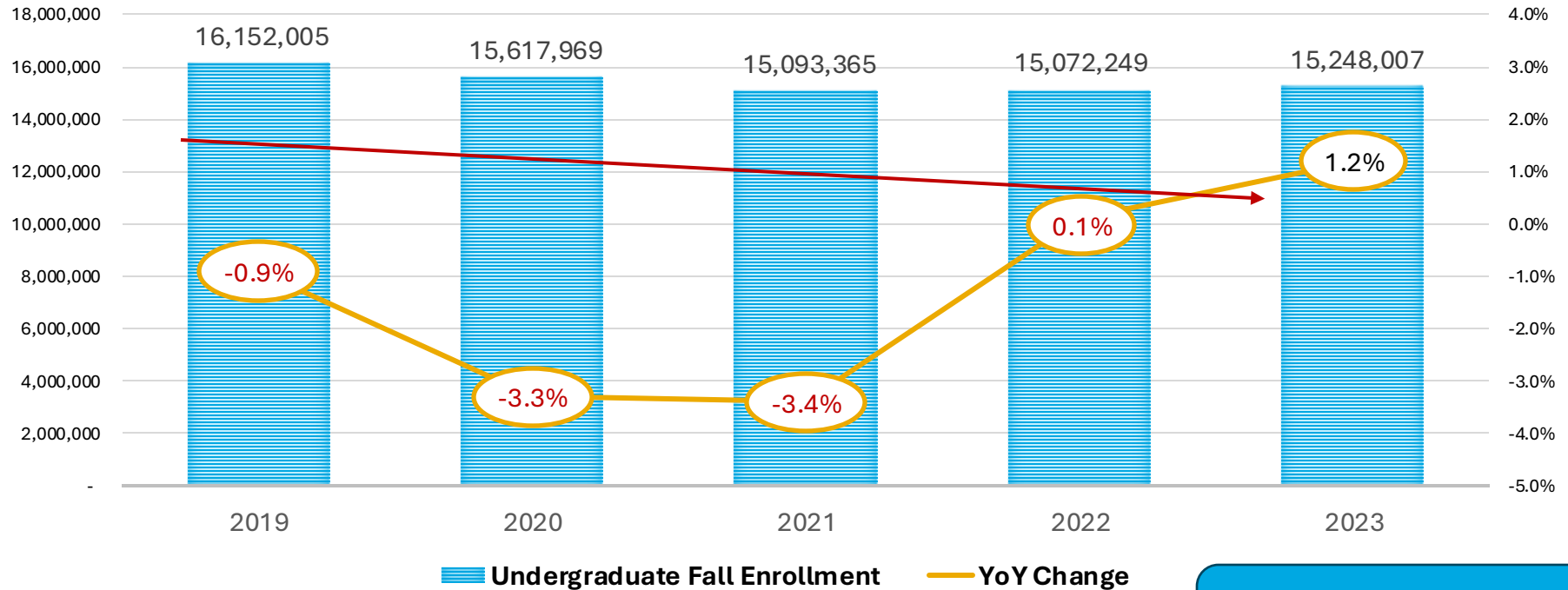
# 2024-25 High School Graduates Rank



Sources:  
\*Western Interstate  
Commission for Higher  
Education, *Knocking at the  
College Door: Projections of  
High School Graduates,  
2020*,  
[www.knocking.wiche.edu](http://www.knocking.wiche.edu)

State	2024-25 GRAND TOTAL HS Graduates	2024-25 GRAND TOTAL HS Graduates Rank	State	2024-25 GRAND TOTAL HS Graduates	2024-25 GRAND TOTAL HS Graduates Rank
California	491,240	1	Utah	51,680	27
Texas	413,100	2	Oklahoma	48,660	28
Florida	244,060	3	Oregon	44,610	29
New York	213,400	4	Connecticut	43,280	30
Pennsylvania	148,510	5	Iowa	39,620	31
Illinois	148,090	6	Kansas	38,440	32
Ohio	134,530	7	Nevada	35,450	33
Georgia	127,690	8	Arkansas	35,310	34
North Carolina	120,980	9	Mississippi	32,910	35
New Jersey	119,620	10	Nebraska	24,880	36
Michigan	107,670	11	Idaho	24,410	37
Virginia	100,210	12	New Mexico	21,800	38
Arizona	84,630	13	West Virginia	18,050	39
Washington	81,170	14	Hawaii	15,500	40
Indiana	79,780	15	New Hampshire	14,920	41
Massachusetts	79,420	16	Maine	14,810	42
Maryland	77,650	17	Rhode Island	11,390	43
Tennessee	76,880	18	Delaware	11,230	44
Missouri	74,920	19	South Dakota	10,990	45
Minnesota	71,970	20	Montana	10,410	46
Wisconsin	69,530	21	North Dakota	8,490	47
Colorado	65,300	22	Alaska	8,400	48
South Carolina	58,940	23	Vermont	6,710	49
Alabama	53,640	24	Wyoming	6,330	50
Louisiana	53,090	25	District of Columbia	4,980	51
Kentucky	52,120	26			

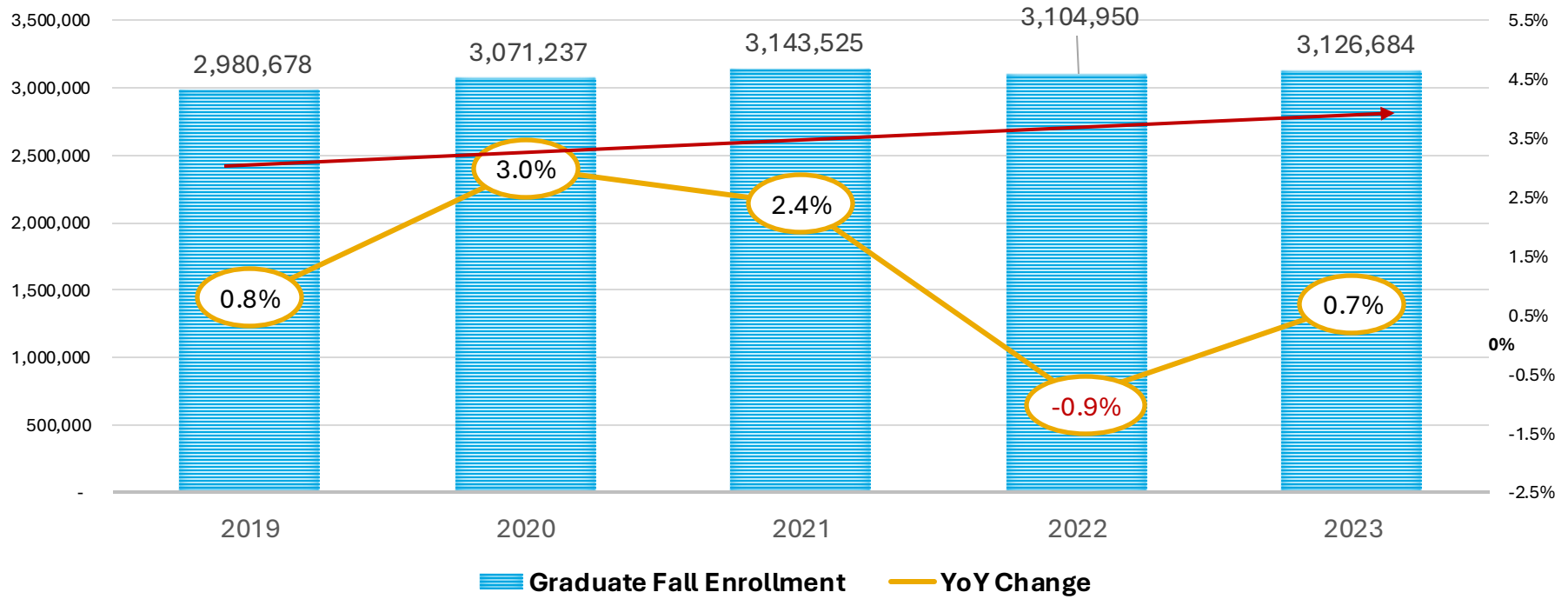
# Undergraduate enrollment grew in 2023, after years of contraction, but institutions that can accelerate and personalize contact will lead.



\*Source: National Student Clearinghouse, [CTFE, Fall 2023](#)

In 2023, first-year enrollment was up .8%, publics were up .3%, and privates were up 1%

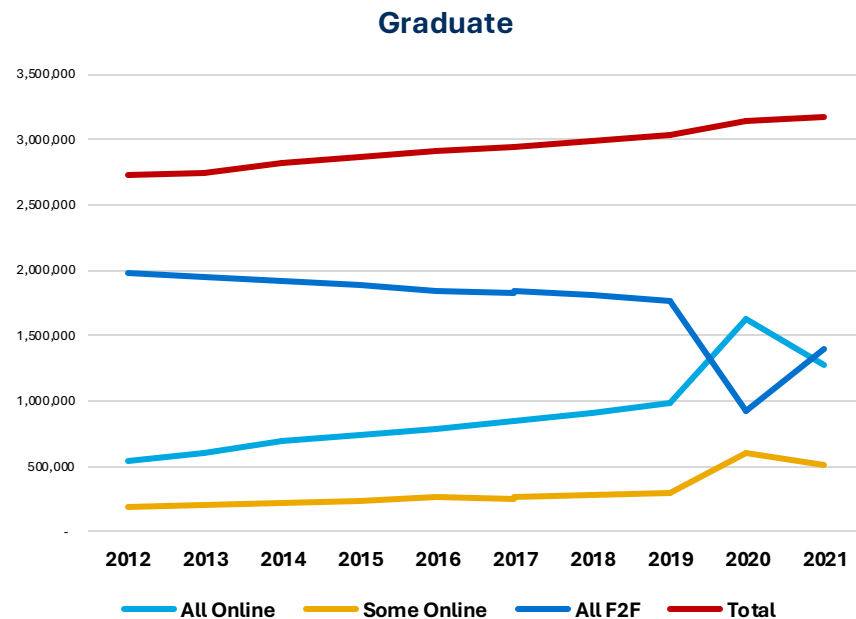
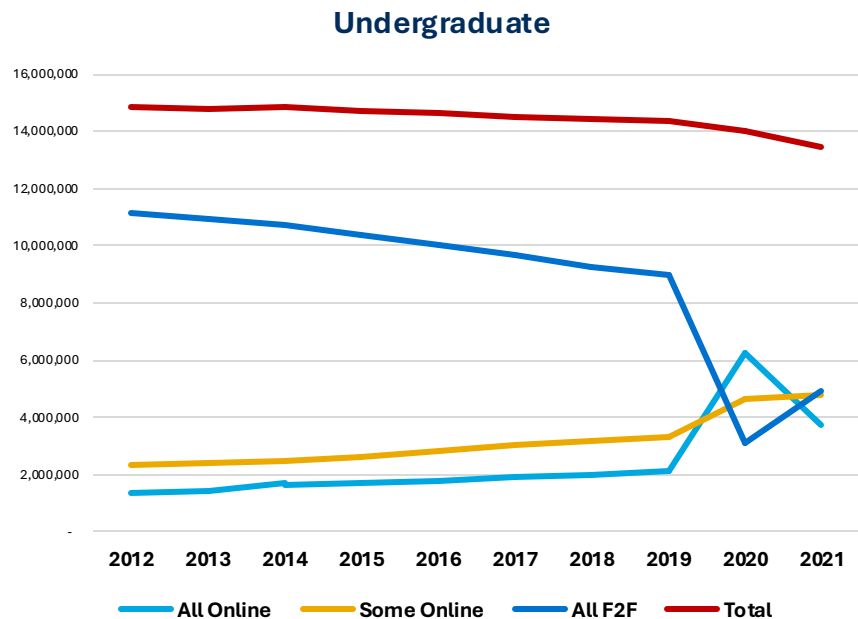
# Graduate enrollment growth is returning to pre-pandemic levels.



\*Source: National Student Clearinghouse, [CTEE, Fall 2023](#)

# Enrollment Trends and Format Choice Since 2012

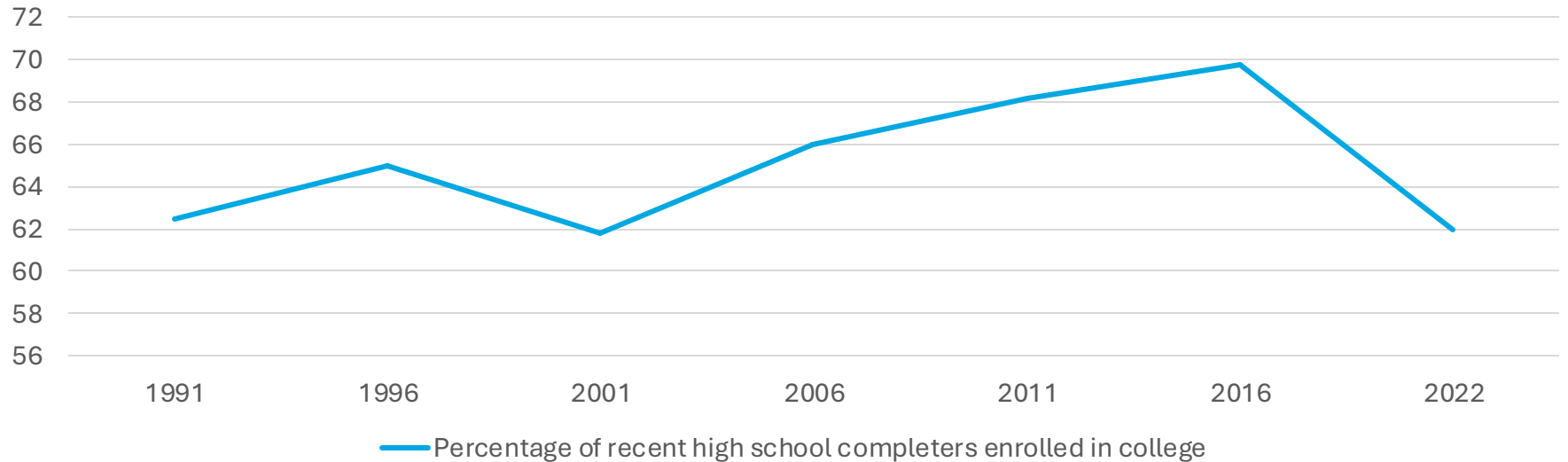
At both the undergraduate and graduate levels, fully online and fully classroom students are now at near parity. Is this the future of higher education?



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

# College Participation Rates Had Been A Key Growth Driver

Percentage of recent high school completers enrolled in college



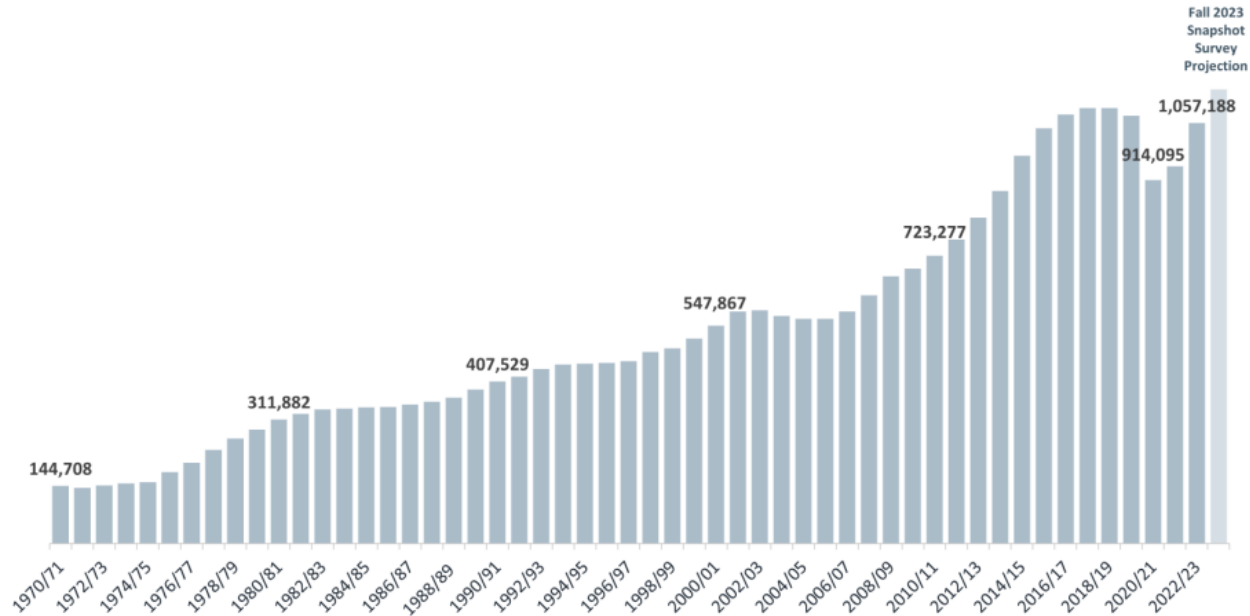


By 2030, the number of internationally mobile students will grow from 6 million to 2023 to over 10 million.

### **Outlook 2030 Brief – The U.S. and International Education**

# International Students Mobility to the United States

Sources: Open Doors, 2023; Fall Snapshot Survey, 2023





# International Students Come From Every World Region

International students study in the US from over 210 places of origin



# Implications of Enrollment Decline and Demographic Shift

- Understand the market segments, market potential, and market share for your institution.
- Set realistic goals given the market pressures. Understand the data for your market.
- Investigate new market segments with a realistic plan driven by data.
- Creating a welcoming environment and segmented recruitment to diverse populations is necessary.
- Graduate programs and International should be growth areas in the future.

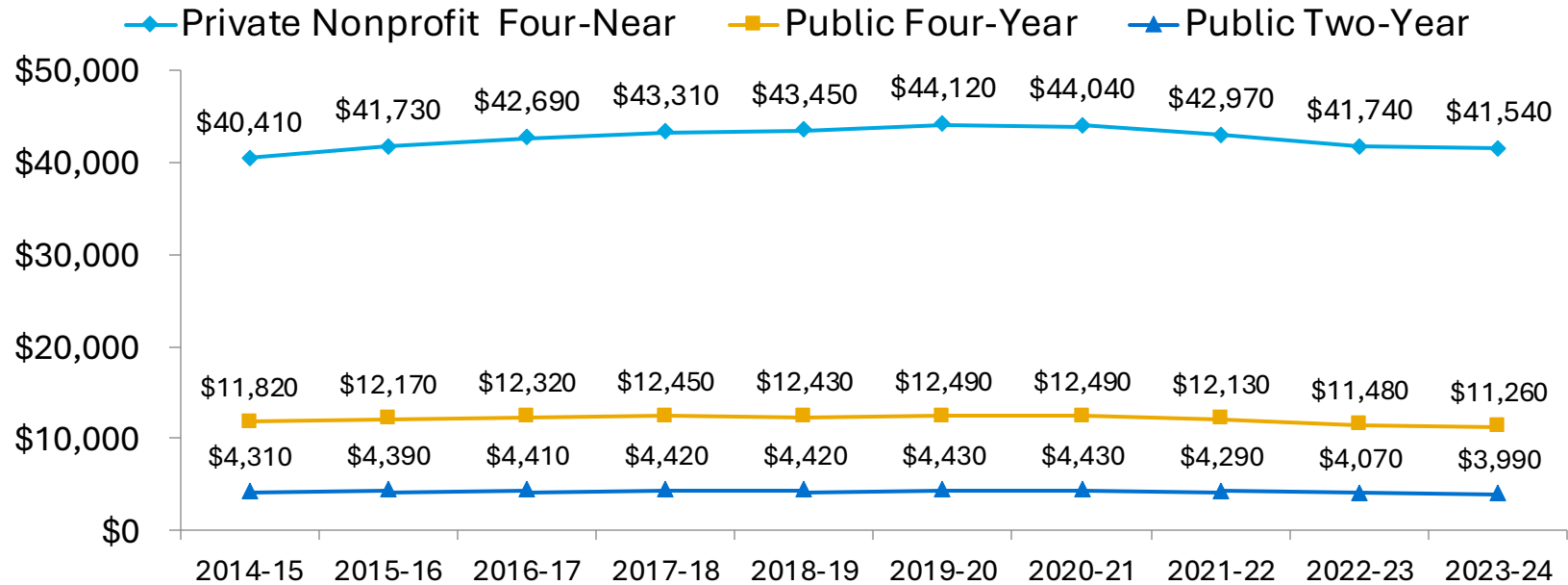
# **The Economics of Higher Education**



**2**

# Average Tuition and Fee Charges in 2023 Dollars

## 2014-15 to 2023-24

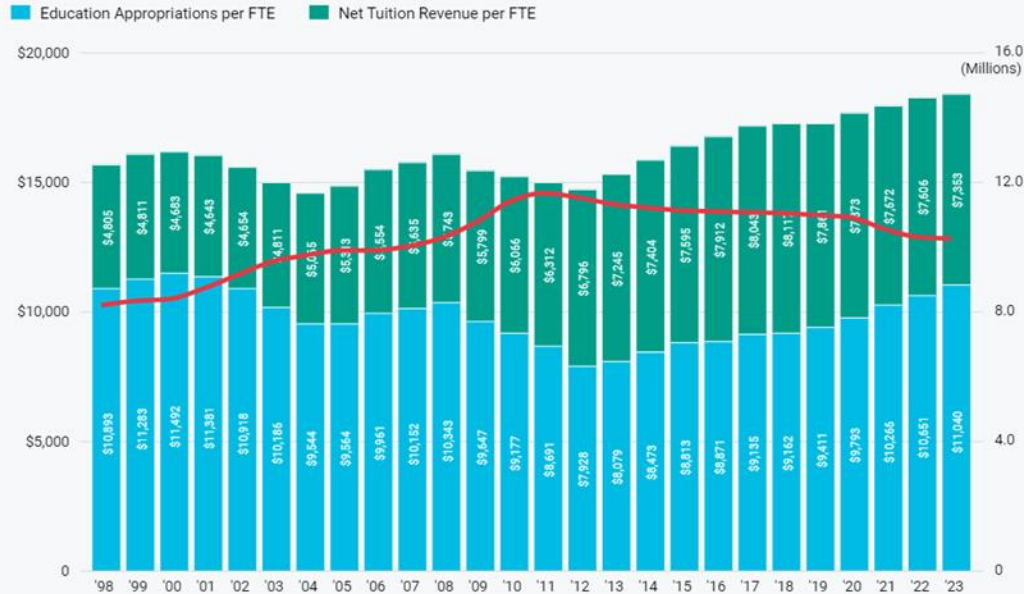


# Public FTE Enrollment, Education Appropriations per FTE, and Net Tuition Revenue per FTE, U.S., FY 1998-2023 (Constant Dollars)

FIGURE 2.1

Public FTE Enrollment, Education Appropriations per FTE, and Net Tuition Revenue per FTE, U.S., FY 1998-2023 (Constant Dollars)

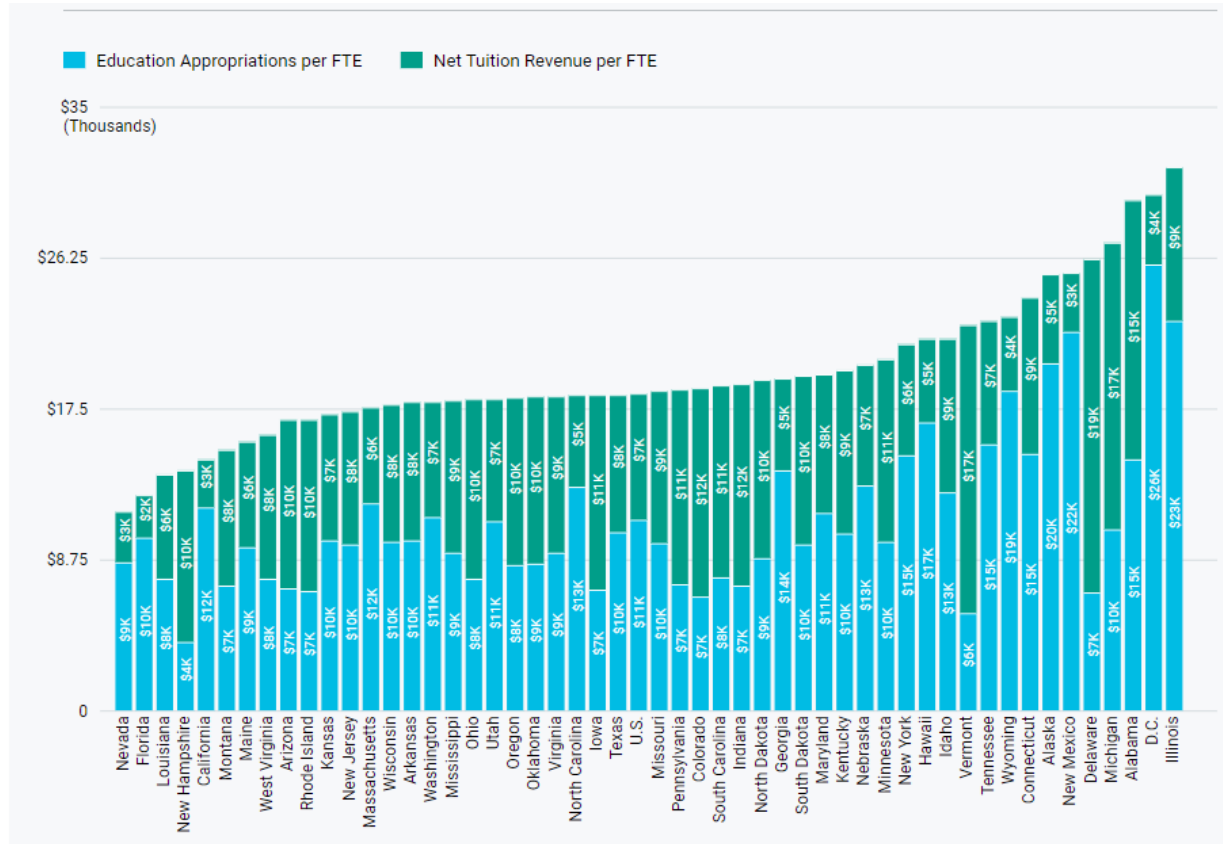
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# Education Appropriations and Net Tuition Revenue per FTE by State, FY2003

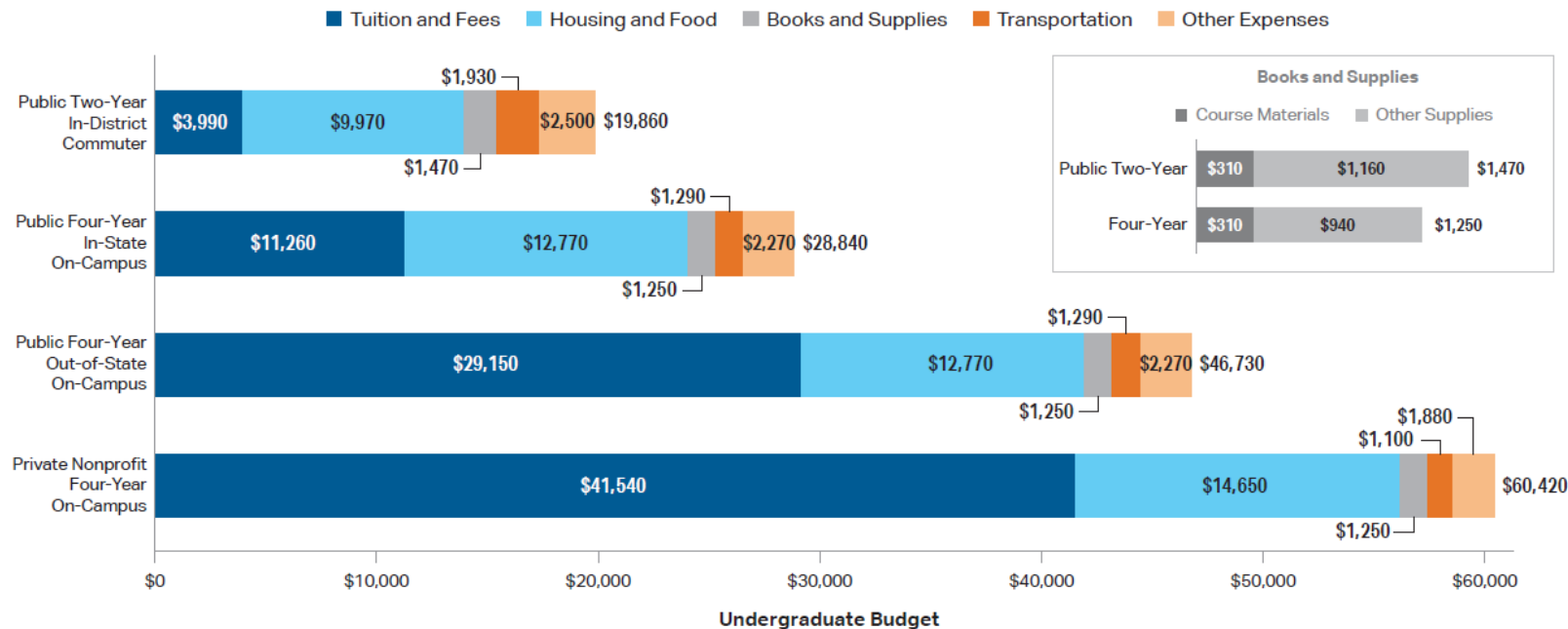


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# Average Estimated Full-Time Undergraduate Budgets

## Enrollment Weighted by Sector, 2023-24



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# Average net tuition revenue by Institutional Type in constant dollars: 2009-10, 2014-15, and 2019-20

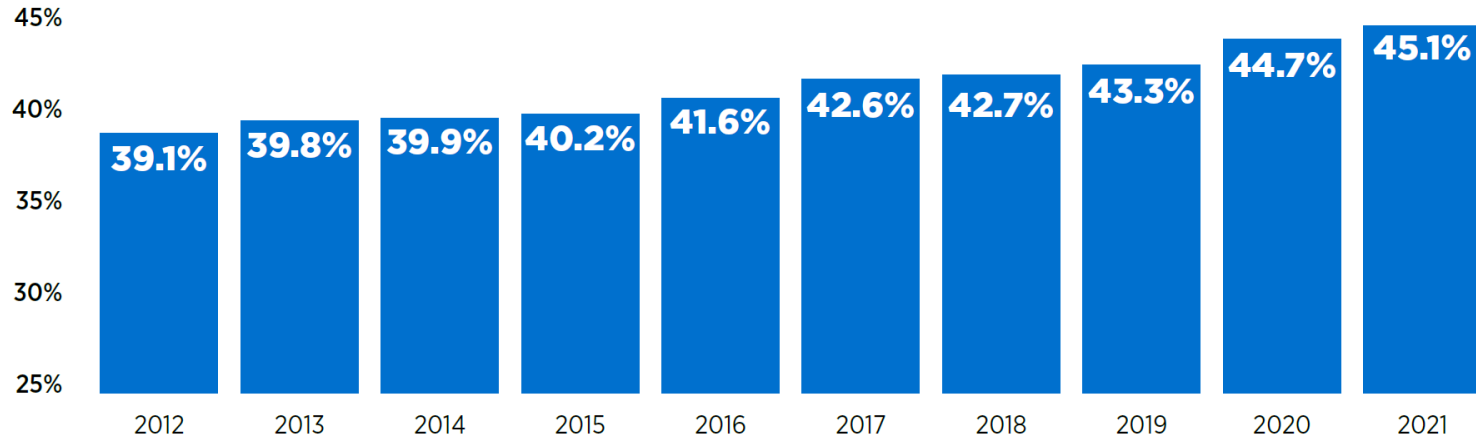
Institution Type	2009-10 NTR	2014-15 NTR	2019-20 NTR	10 Year % change ('09-'19)	5 Year % change ('14-'19)	5 Year Annual % Change
Public Doctoral	\$10,080	\$11,960	\$12,560	24%	5%	1.7%
Public Master's	\$7,480	\$8,220	\$8,320	11%	1%	.72%
Public Bachelor's	\$5,400	\$5,920	\$5,860	8%	-1%	.75%
Public Associates	\$3,220	\$3,740	\$3,770	17%	.8%	.84%
Private Non-Profit Doctoral	\$22,470	\$24,280	\$25,800	15%	6%	1.65%
Private Non-Profit Master's	\$15,560	\$15,930	\$15,270	-2%	-4%	-.07%
Private Non-Profit Bachelor's	\$17,730	\$17,560	\$17,070	-4%	-3%	-.67%

Source: Data derived from 2022 Trends in College Pricing. Copyright © 2022, the College Board. [www.collegeboard.org](http://www.collegeboard.org).  
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# First-year student discounting benchmarks

## Four-year private institutions



**+0.4**

**POINT INCREASE**

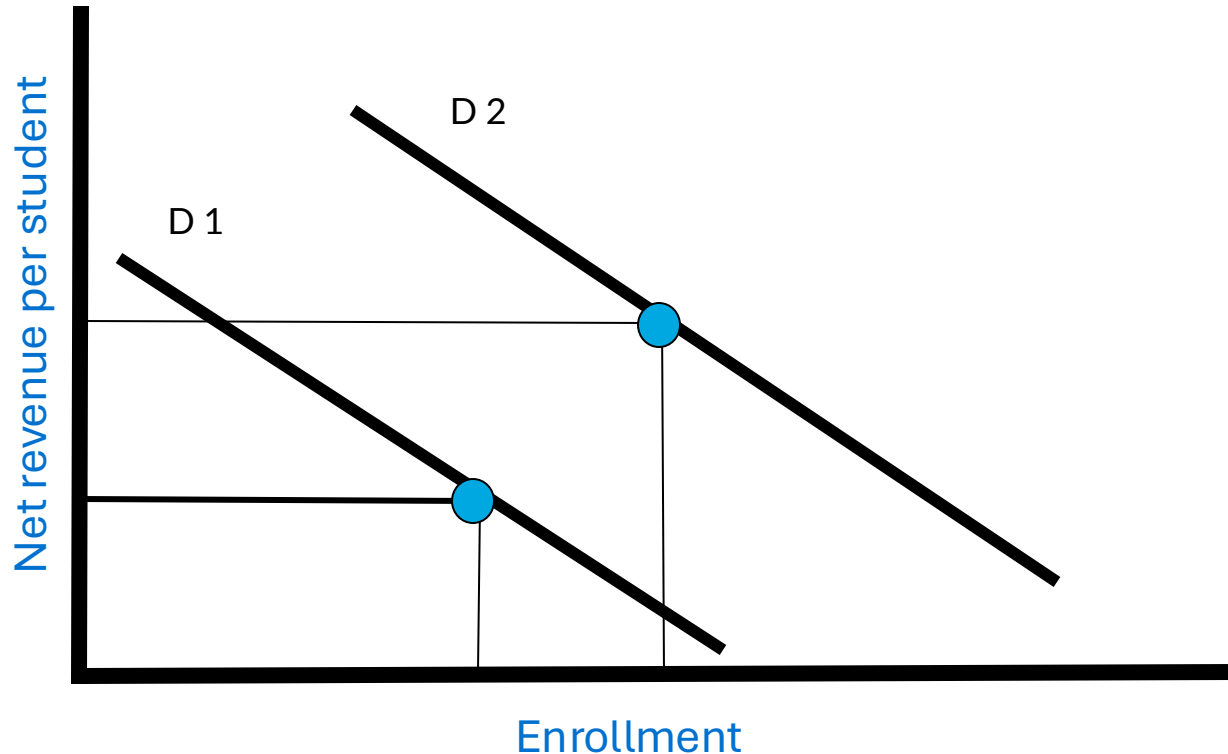
in overall average discount rate

**58.2%**

**AVERAGE TUITION AND FEE**

discount rate in 2021

# In this environment, most institutions needs to focus on stimulating additional demand to grow/shape enrollment and optimize net tuition revenue



# Implications of Higher Education Economics

Campuses need a detailed understanding of net tuition revenue (NTR) and revenue sources for proper goal setting and planning.

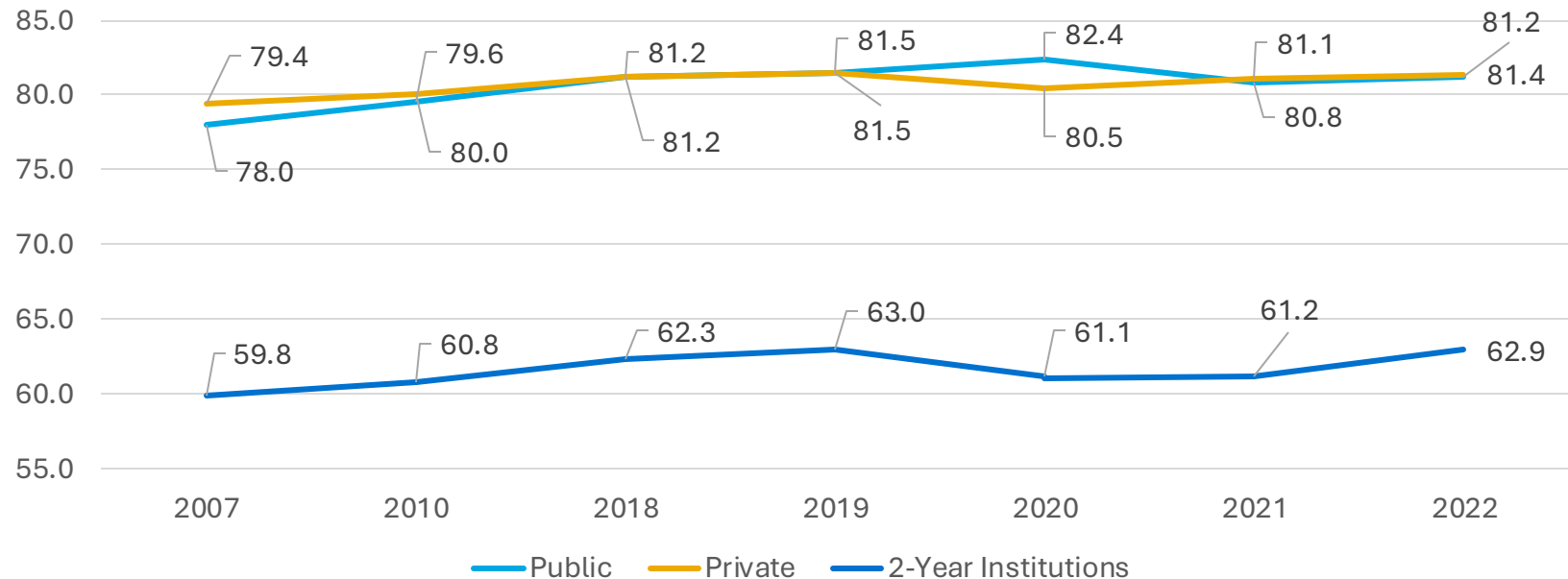
Families are cost conscious and growing populations may be loan adverse.

Knowing what investments have the best return on investment (ROI) to meet revenue goals is critical to long term success.

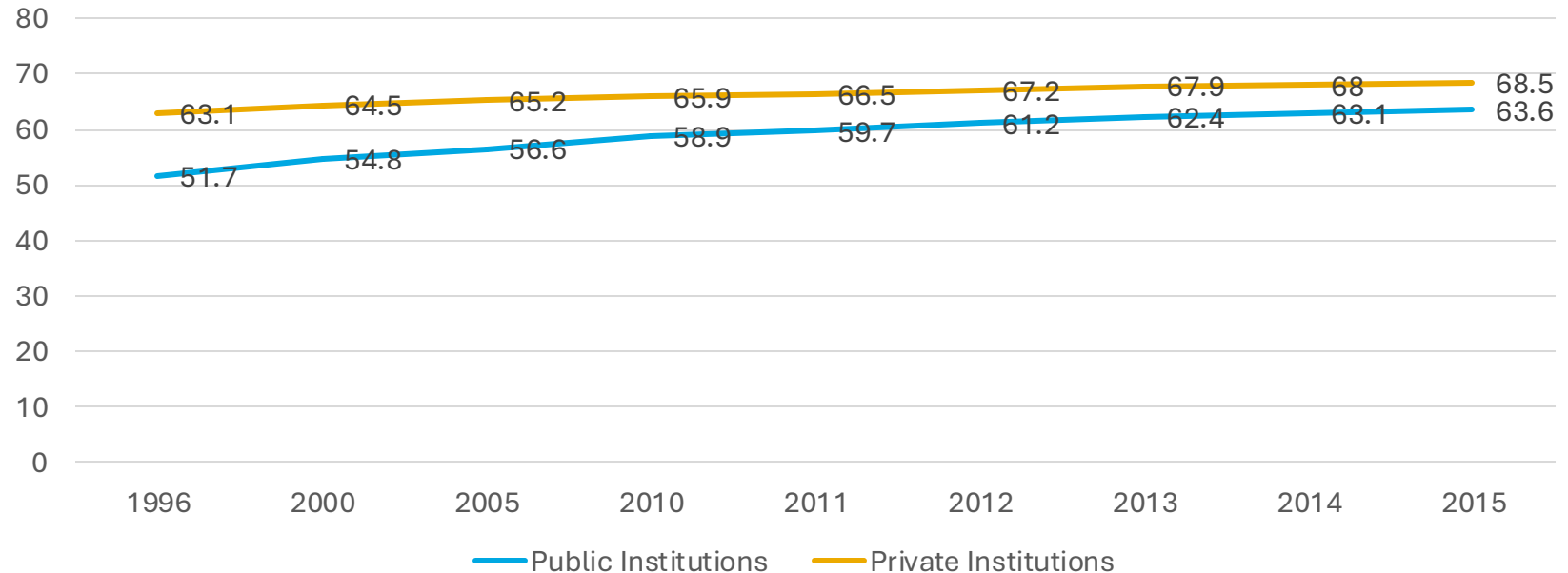
# The Retention and Completion Imperative



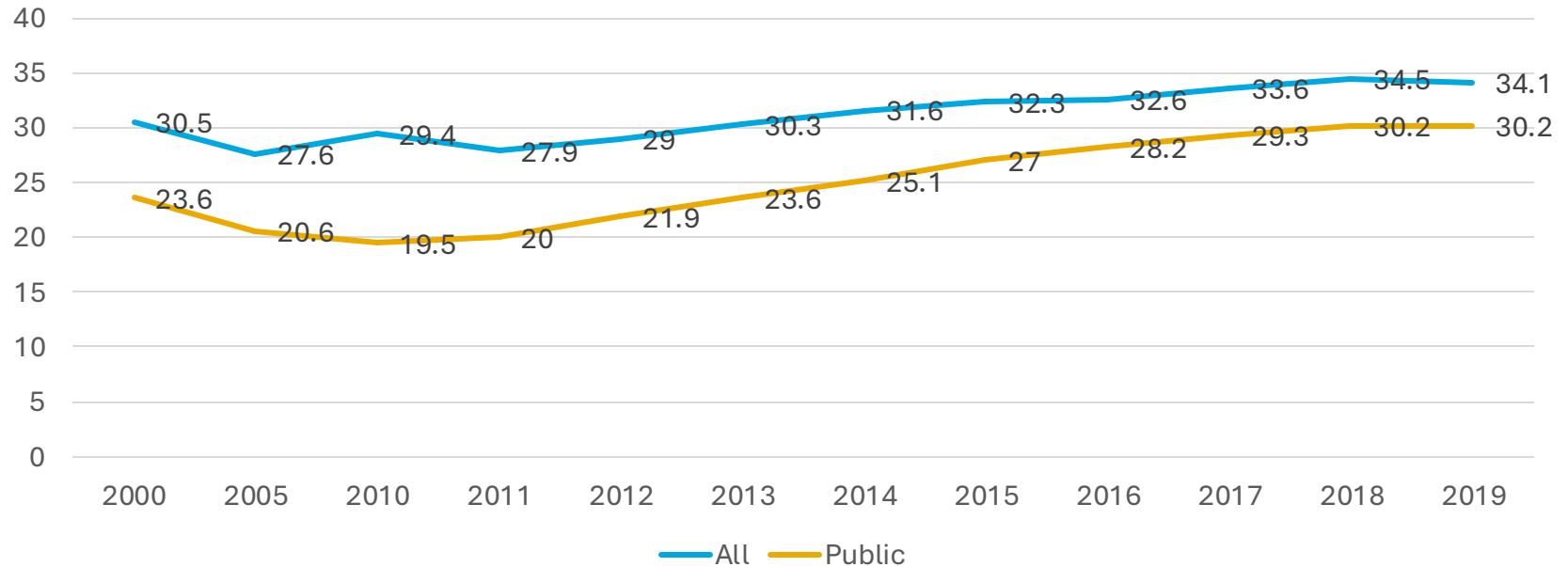
# Percentage of first-year students at four-year colleges/universities who return for a second year: 2006-2022 selected cohorts



# Percentage of four-year college students who earn a degree within six years of entry: Selected cohorts 1996-2015



# Percentage of two-year college students who earn a certificate or associate degree within 150 percent time: 2000-2019



# Term-to-term persistence benchmarks

## FTIC term-to-term persistence rate benchmarks

Persistence Ratios	FOUR-YEAR PRIVATE			FOUR-YEAR PUBLIC	
	ALL	HIGHER SELECTIVITY	LOWER SELECTIVITY	ALL	
Persistence from term one to term two, 2020-2021 academic year	25th Percentile	84.8%	85.0%	82.0%	81.3%
	<b>Median</b>	<b>88.0%</b>	<b>88.5%</b>	<b>87.5%</b>	<b>86.5%</b>
	75th Percentile	92.5%	91.8%	92.5%	89.0%
Persistence from term two of the 2020-2021 academic year to term three (the beginning of the 2021-2022 academic year)	25th Percentile	80.3%	82.3%	76.8%	78.0%
	<b>Median</b>	<b>83.5%</b>	<b>87.5%</b>	<b>81.5%</b>	<b>82.0%</b>
	75th Percentile	88.5%	90.5%	85.3%	85.0%



# Retention benchmarks

## Longitudinal view for FTIC students: Continuing enrollment, terms one to five

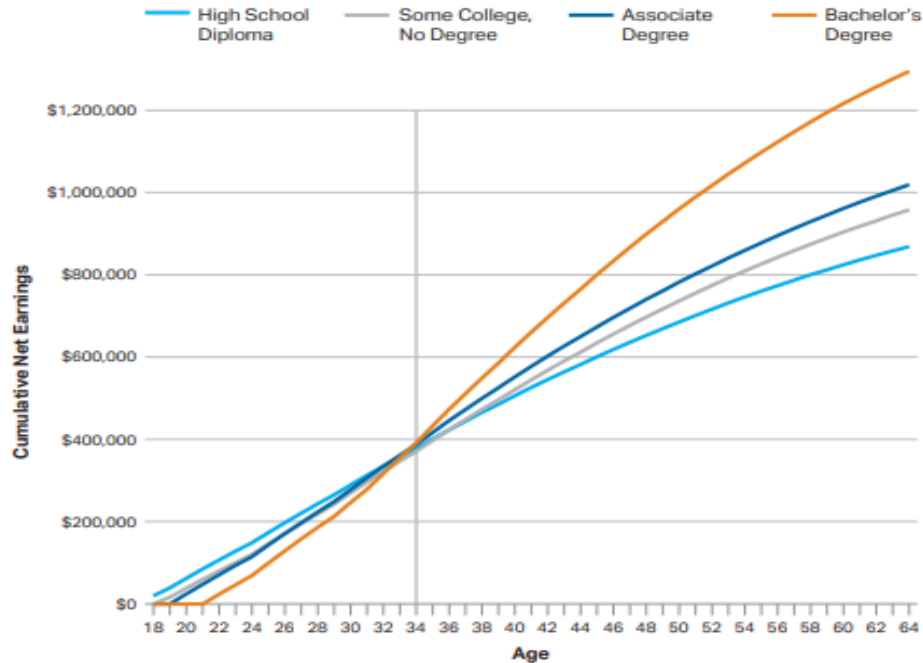
Continuation Rates	FOUR-YEAR PRIVATE	FOUR-YEAR PUBLIC
Persistence from term one to term two, 2019-20 academic year	88.5%	87.0%
Persistence from term two of the 2019-20 academic year to term three (first term of 2020-21 academic year)	87.0%	83.0%
Persistence from term three to term four, 2020-21 academic year	93.0%	91.5%
Persistence from term four of the 2020-21 academic year to term five (first term of 2021-2022 academic year)	93.0%	91.5%

# Retention benchmarks

Newly arrived transfer student fall-to-fall retention rate benchmarks from fall 2020 to fall 2021

Retention Ratios	FOUR-YEAR PRIVATE			FOUR-YEAR PUBLIC
	ALL	HIGHER SELECTIVITY	LOWER SELECTIVITY	ALL
25th Percentile	71.0%	69.0%	73.3%	70.0%
<b>Median</b>	<b>78.0%</b>	<b>78.0%</b>	<b>79.0%</b>	<b>75.5%</b>
75th Percentile	87.0%	89.0%	81.8%	86.3%

# Estimated Cumulative Full-time Median Earnings (in 2020 Dollars) Net of Loan Repayment for Tuition and Fees and Books and Supplies, by Education Level



# The Retention and Completion Imperative

- Improving persistence and retention is imperative to maintaining or increasing enrollment.
- Benchmark against your peer set and set goals/KPIs.
- ROI on retention and completion efforts are typically higher than marketing and recruitment ROI.
- Create a retention plan with accountability for key performance indicators (KPIs).

# **Student behaviors and changes in the investment of recruitment activities**



# Understanding the needs of today's students

The data are clear—students and parents need to be engaged

- **79**—average number of times a student unlocks their phone each day
- **98%** of students consider financial aid and scholarship as somewhat or very important in enrollment decision
- **70%** of students bypass direct marketing and search on their own
- **99%** of parents say they are involved in the search process




## *Top channels*

- Website
- Email
- Video
- Social Media
- Text

## *Top desired content*

- Academic programs
- Cost/Aid
- What the community is like

# Most influential sources during college search



RESOURCE	OVERALL	SENIORS	JUNIORS	SOPHOMORES
The college's website	3.99	3.91	3.91	4.08
Results from a financial aid or scholarship calculator	3.84	3.85	3.77	3.90
Statistics on salaries of recent college graduates	3.69	3.79	3.74	3.65
Videos of campus, classrooms, students, residence halls	3.75	3.73	3.70	3.86
Email from a particular school	3.75	3.70	3.79	3.90
Phone calls from admissions counselors	3.64	3.58	3.80	3.73
Texts or live messages from admissions counselors	3.62	3.54	3.59	3.66
Virtual reality videos	3.50	3.53	3.41	3.43
Social media posts	3.36	3.51	3.46	3.28
Virtual tours	3.51	3.51	3.59	3.78

# Most commonly used search terms during the college search process



60%

## College financing terms

financial aid  
scholarships  
affordable  
tuition  
cost  
grants



48%

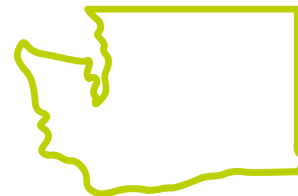
## Subject area or Major field of study

major and location  
major and type of institution



24%

## Name of the school



12%

## Location

state  
city  
region of the country



# Most important factors in the students' decision to attend a particular institution



**69%**

Availability of my desired academic program



**61%**

Cost

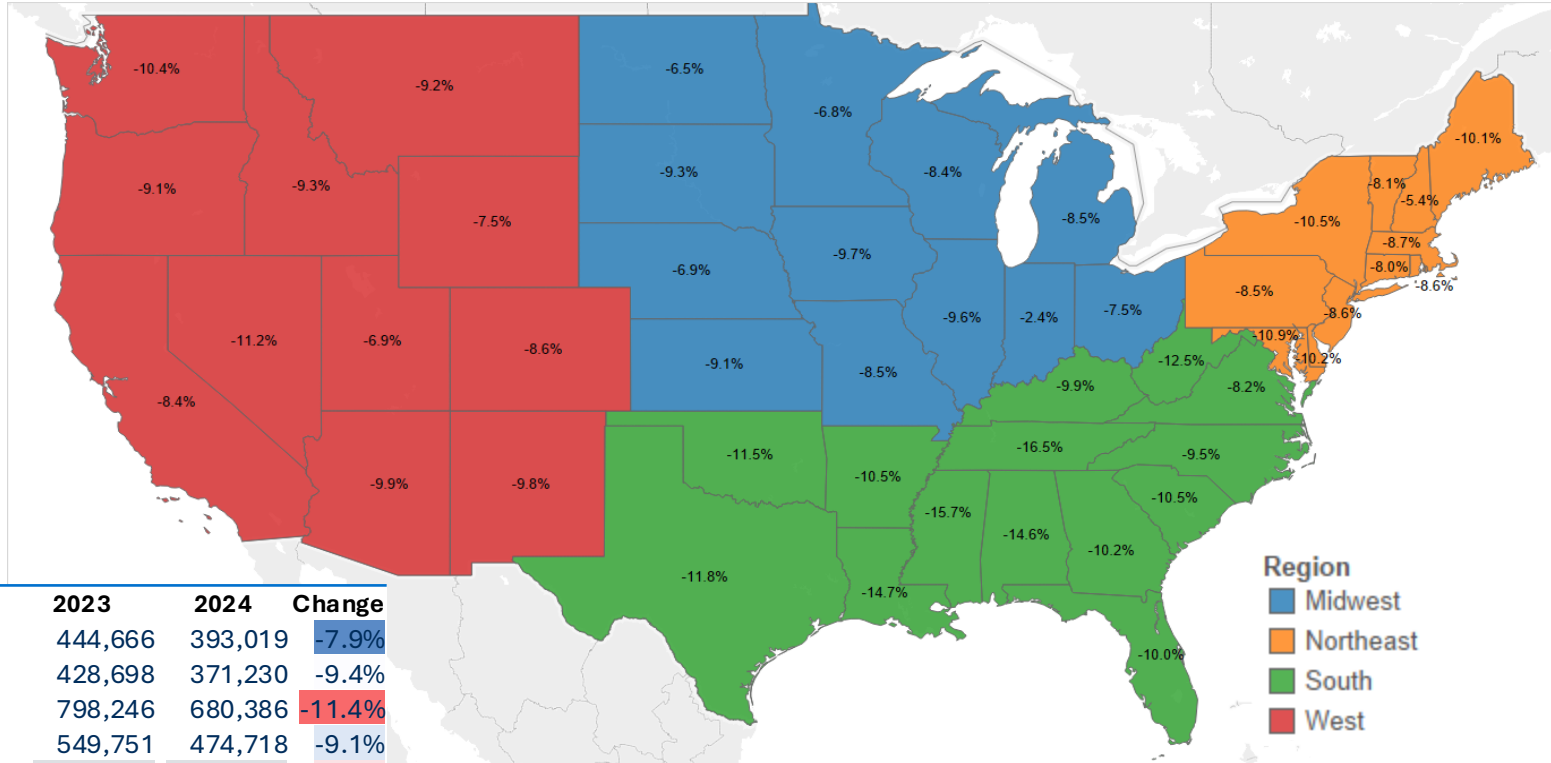


**51%**

Financial aid or scholarships I was awarded

# Estimated FAFSA Filing Rates

Change in Estimated Filing Rate– Week 35 – through May 31



	2023	2024	Change
Midwest	444,666	393,019	-7.9%
Northeast	428,698	371,230	-9.4%
South	798,246	680,386	-11.4%
West	549,751	474,718	-9.1%
<b>Totals</b>	<b>2,221,361</b>	<b>1,919,353</b>	<b>-9.7%</b>

# Week to Week Summary

Week	2023	2024	% Change	Deficit /Increase	Perc Change in Filing
17: through January 26	1,554,019	675,630	-56.5%	-878,389	-23.8%
18: through February 2	1,623,250	828,978	-48.9%	-794,272	-21.7%
19: through February 9	1,671,077	921,668	-44.8%	-749,409	-20.6%
20: through February 16	1,716,246	1,004,722	-41.5%	-711,524	-19.7%
21: through February 23	1,762,284	1,093,404	-38.0%	-668,880	-18.7%
22: through March 1	1,831,638	1,202,603	-34.3%	-629,035	-17.7%
23: through March 8	1,894,962	1,271,688	-32.9%	-623,274	-17.6%
24: through March 15	1,928,817	1,336,966	-30.7%	-591,851	-16.8%
25: through March 22	1,958,904	1,395,299	-28.8%	-563,605	-16.2%
26: through March 29	1,986,382	1,447,804	-27.1%	-538,578	-15.5%
27: through April 5	2,013,628	1,501,465	-25.4%	-512,163	-14.9%
28: through April 12	2,037,732	1,531,067	-24.9%	-506,665	-14.8%
29: through April 19	2,066,979	1,590,407	-23.1%	-476,572	-14.0%
30: through April 26	2,094,354	1,643,705	-21.5%	-450,649	-13.4%
31: through May 3	2,128,518	1,723,745	-19.0%	-404,773	-12.3%
32: through May 10	2,154,270	1,804,592	-16.2%	-349,678	-10.9%
33: through May 17	2,179,320	1,852,300	-15.0%	-327,020	-10.3%
34: through May 24	2,201,877	1,888,648	-14.2%	-313,229	-10.0%
35: through May 31	2,221,361	1,919,353	-13.6%	-302,008	-9.7%

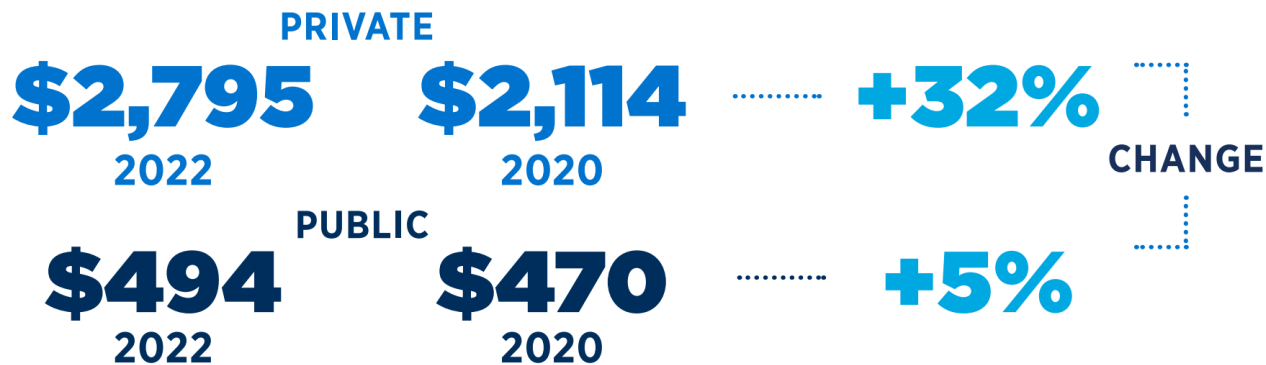
# Student behaviors and changes

- Both students and parents need to be engaged in the college selection process.
- Your college's website is the welcome mat for your campus.
- Financial aid pages and academic pages are heavily visited areas of your site.
- Website information needs to constantly reinforce ROI as “we” must drive the higher education agenda.



# **Cost to Recruit Students**

# Cost to recruit an undergraduate student



Note: All 2020 results are from the *2020 Cost of Recruiting an Undergraduate Student Report*.

# Cost to recruit a single student

COST OF RECRUITING ONE ...	PRIVATE 2022	PRIVATE 2020	PUBLIC 2022	PUBLIC 2020
Undergraduate student	\$2,795	\$2,114	\$494	\$470
Transfer student	\$278	\$333	\$109	\$27
International student	\$855	\$585	\$0*	\$125




\*Because RNL uses the median for cost, the international student amount was \$0 for public institutions that provided data on international student recruitment costs.

# Budget




## PERCENTAGE CHANGES IN THE BUDGET FOR RECRUITMENT AND ADMISSIONS

2021-2022 Budget vs. 2019-20 Budget

### PRIVATE INSTITUTIONS

	Budget <b>decreased</b> more than 2%	22%
	Budget stayed the same	25%
	Budget <b>increased</b> more than 2%	53%

### PUBLIC INSTITUTIONS

	Budget <b>decreased</b> more than 2%	21%
	Budget stayed the same	8%
	Budget <b>increased</b> more than 2%	71%



# Budget allocation (private)

PRIVATE	2022	2020
Student search (purchased lists and full costs if outsourced to a vendor)	16%	14%
<b>Digital advertising</b>	<b>12%</b>	<b>n/a*</b>
Web services (i.e., SEO, consulting, general maintenance)	9%	11%
CRM costs	9%	n/a
Travel	8%	17%
Prospective student communications (phone, email, direct mail, and texting)	8%	13%
Recruitment publications	7%	11%
Events (on-campus, off-campus, virtual)	7%	12%
<b>Digital lead generation</b>	<b>7%</b>	<b>n/a*</b>
Traditional advertising	5%	6%
Transfer recruitment	4%	4%
International recruitment	3%	5%
Other	2%	8%
Chat	0.5%	n/a

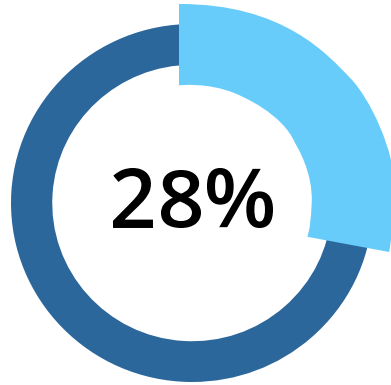
# Budget allocation (public)

PUBLIC	2022	2020
Student search (purchased lists and full costs if outsourced to a vendor)	15%	12%
Travel	14%	16%
Recruitment publications	13%	15%
Events (on-campus, off-campus, virtual)	12%	11%
Prospective student communications (phone, email, direct mail, and texting)	9%	17%
<b>Digital advertising</b>	<b>7%</b>	<b>n/a*</b>
Transfer recruitment	6%	4%
Web services (i.e., SEO, consulting, general maintenance)	6%	13%
CRM costs	5%	n/a
Traditional advertising	4%	6%
Other	3%	3%
<b>Digital lead generation</b>	<b>2%</b>	<b>n/a*</b>
International recruitment	1%	3%
Chat	1%	n/a

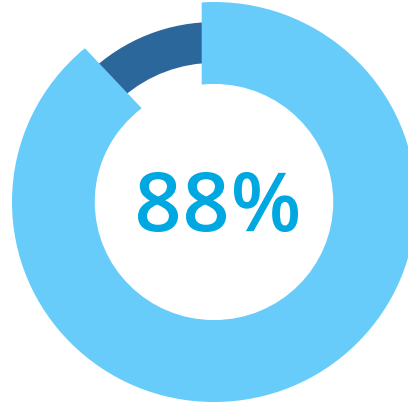


# **Addressing Students' Mental Health**

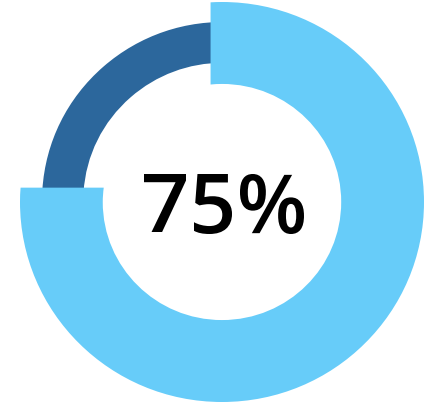
# Why we need a holistic approach to student success



**of incoming students question whether college is worth the effort**



**of students say psychological wellbeing is important to college success**



**of students and administrators say holistic development is important to student success**

# A holistic student success approach must address mental health

- More than 60% of college students met the criteria for at least one mental health problem and 73% of students reported moderate or severe psychological distress.\*
- **Students who engage in counseling *and* participate in co-curricular activities are 51% less likely to withdraw from school\*\*\*\***
- Nearly 6 in 10 college students report mental state negatively impacted their grades\*\*
- **More than 80% of students are feeling stress and anxiety, with 75% saying it has impacted their academic work.\***
- From 2013 to 2021, researchers found depression among college students increased by nearly 135%.\*

\*Healthy Minds Study

\*\*Fortune conducted by the Harris Poll

\*\*\*National Alliance on Mental Illness (NAMI)

\*\*\*\*Center for Collegiate Mental Health. (2023, January). 2022 Annual Report (Publication No. STA 23-168)

# 64%



Students who leave college because of mental health issues\*\*\*

The background of the slide features a blue-tinted image of several hands reaching out to hold a globe. The hands are positioned around the globe, with some fingers pointing towards it, symbolizing global collaboration and support. The text is centered over this image.

# **Marketing and Recruitment Practices for Graduate Students**



# Marketing budgets are inadequate for today's competition

## Average marketing spend for current year (by size of institution)

**\$142,041**

Small

**6**

Median  
number of  
programs

**\$437,788**

Mid-size

**10**

Median  
number of  
programs

**\$551,978**

Large

**14**

Median  
number of  
programs





Note: Small institutions are defined as enrolling fewer than 500 students, Mid-Sized institutions enroll 500 to 2,000 students, and Large institutions enroll more than 2,000 students.

## Marketing Launch Costs

**\$150<sub>k</sub>**





**...recent RNL estimate of a launch budget for a new graduate program in an “average” market, seeking to enroll 20 students.**

# Typical allocation of marketing budgets

	PRIVATE	PUBLIC
 Digital advertising	40%	43%
 SEO/organic lead generation	16%	13%
 Traditional media	12%	13%
 Events (face-to-face)	6%	9%



# Typical allocation of marketing budgets (cont.)

	PRIVATE	PUBLIC
 Events (virtual)	6%	8%
 Corporate partnerships	2%	1%
 Other	1%	2%
 Don't Know	17%	13%

# Budget allocations based on average marketing budget

**PRIVATE**

**PUBLIC**



**Digital advertising**

**\$164,925**

**\$257,426**



**SEO/organic lead generation**

**\$65,970**

**\$77,827**



**Traditional media**

**\$49,477**

**\$77,827**






**Events (face-to-face)**

**\$24,739**

**\$53,880**

# Budget allocations based on average marketing budget (cont.)

	PRIVATE	PUBLIC
 Events (virtual)	\$24,739	\$47,893
 Corporate partnerships	\$8,246	\$5,987
 Other	\$4,123	\$11,973



# One in ten graduate operations has incorporated AI into its marketing efforts.

## Are you using AI in your marketing efforts?

**YES**



**10%**

All

**NO**



**90%**

All

### Please, describe:

- SEO, Content Creation, and Data Analysis
- Content writing and optimizing ad copy
- Ad copy ideas
- We offer a master's program in AI Engineering
- For idea generation around messaging and writing marketing plans
- Content generation
- Optimizing re-marketing

# Student behaviors and campus investment

- Understand where students go for information and what channels they use.
- Prioritize information for what prospective students and families are looking in the college search.
- Be proactive with the value/cost information across a variety of channels.
- Ensure your academic information is up to date and you have strong search engine optimization (SEO).
- Align your strategic investments to those areas that will have the greatest return.
- Begin folding AI services and tools into your process to improve your marketing efforts.



# **Possible Future Budget Investment Areas**

# Strategies to increase ROI and reduce cost

1. Increase efficiency and ROI if your costs or staff levels are at higher levels.
2. Make sure you are not underfunded or understaffed.
3. Look at your marketing and recruitment efforts across the funnel. How are you using and thinking about incorporating AI tools?
4. Align your budgeting with today's digital environment.
5. Look for opportunities with transfer students and international enrollment.



# Questions



# Thank You

## **Wes Butterfield**

Chief of Consulting Services

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rnl national conference  
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**empowering higher education**

ready to lead the way with RNL?

**schedule a quick  
consultation**



scan here



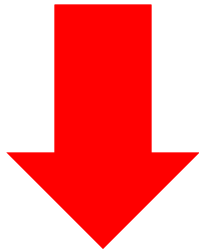
# Appendix

# Possible Future Budget Investment Areas

## Private institutions

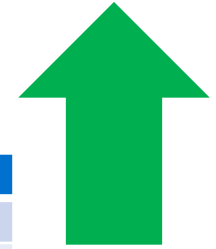


	Higher priority
Website (content, functionality, SEO, etc.)	75%
Operational efficiency	42%
Digital advertising	39%
Campus events	39%
Search engine optimization	28%
Digital lead generation	25%



	Lower priority
Chatbot	97%
Streaming digital audio (Spotify, Pandora, etc.)	94%
Traditional advertising (TV, radio, newspaper, magazine, billboard, etc.)	92%
Virtual tours	78%
Personalized video	75%
Traditional communication channels (email, direct mail, and telephone)	72%
Text messaging	67%

# Possible Future Budget Investment Areas Higher Priority 2020-2022 Comparison



## Private institutions

	2020
Website (content, functionality, SEO, etc.)	76%
Campus events	74%
Digital advertising	54%
Campus events	74%
Search engine optimization	52%
Social media	46%

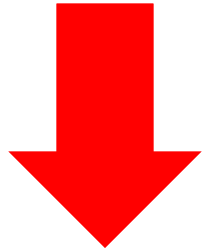
	2020	2022
Website (content, functionality, SEO, etc.)	76%	<b>75%</b>
Operational efficiency	n/a	<b>42%</b>
Digital advertising	54%	<b>39%</b>
Campus events	74%	<b>39%</b>
Search engine optimization	52%	<b>28%</b>
Digital lead generation	n/a	<b>25%</b>

**Social media was ranked as high priority only by 22% in 2022**

# Possible Future Budget Investment Areas

## Lower Priority 2020-2022 Comparison

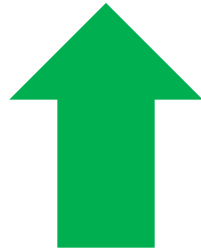
### Private institutions



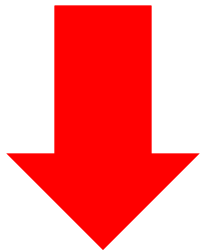
	2020	2022
Chatbot	65%	97%
Streaming digital audio (Spotify, Pandora, etc.)	91%	94%
Traditional advertising (TV, radio, newspaper, magazine, billboard, etc.)	76%	92%
Virtual tours	30%	78%
Personalized video	50%	75%
Traditional communication channels (email, direct mail, and telephone)	41%	72%
Text messaging	30%	67%

# Possible Future Budget Investment Areas

## Public institutions



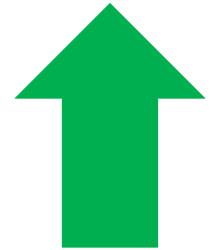
	Higher priority
Website (content, functionality, SEO, etc.)	71%
Operational efficiency	42%
Campus events	38%
Digital advertising	25%



	Lower priority
Streaming digital audio (Spotify, Pandora, etc.)	96%
Traditional advertising (TV, radio, newspaper, magazine, billboard, etc.)	92%
Chatbot	88%
Personalized video	79%
Virtual tours	75%
Traditional communication channels (email, direct mail, and telephone)	75%
Text messaging	67%

# Possible Future Budget Investment Areas

## Higher Priority 2020-2022 Comparison



### Public institutions

	2020
Website (content, functionality, SEO, etc.)	73%
Search engine optimization	59%
Campus events	46%
Digital advertising	46%
Social media	41%

	2020	2022
Website (content, functionality, SEO, etc.)	73%	71%
Operational efficiency	n/a	42%
Campus events	46%	38%
Digital advertising	46%	25%

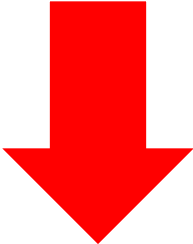
**Social media was ranked as high priority only by 8% in 2022**



# Possible Future Budget Investment Areas

## Lower Priority 2020-2022 Comparison

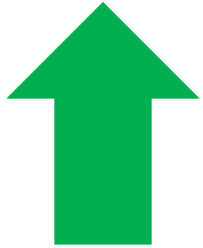
### Public institutions



	2020	2022
Streaming digital audio (Spotify, Pandora, etc.)	73%	96%
Traditional advertising (TV, radio, newspaper, magazine, billboard, etc.)	77%	92%
Chatbot	55%	88%
Personalized video	46%	79%
Virtual tours	23%	75%
Traditional communication channels (email, direct mail, and telephone)	59%	75%
Text messaging	23%	67%

# Anticipated Changes To Activity Allocations In The Next 12-24 Months

## Privates



Anticipated increase

	%
Events	56%
Travel	53%
Student search	50%
Digital advertising	50%
Web services (i.e., SEO, consulting, general maintenance)	41%

	%
CRM costs	78%
Chat	74%
Transfer recruitment	67%

Anticipated decrease



% of respondents who anticipate an increase or a decrease in this budget area

# Anticipated changes to activity allocations in the next 12-24 months

## Publics

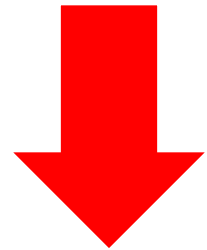


Anticipated increase

	%
Travel	67%
Events	54%
Prospective student communications (phone, email, direct mail, and texting)	46%
Transfer recruitment	42%
Digital Advertising	39%

	%
International recruitment	73%
Traditional advertising	71%
Web services (i.e., SEO, consulting, general maintenance)	67%

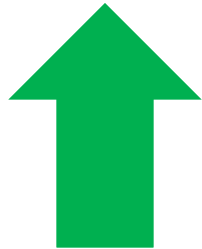
Anticipated decrease



# Budget allocation changes 2016-2022

## Privates

% of respondents who anticipate **an increase** in this budget area



Anticipated  
increase

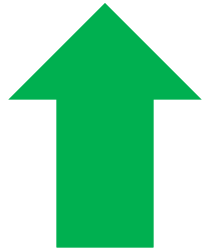
	2016	2022
Digital advertising	71%	50%
Transfer recruitment	42%	27%
Student search	39%	50%
Website development/maintenance	38%	41%
Admissions events	33%	56%

In the 2016 poll we used the term “digital marketing”, in 2022 we used “digital advertising”.

# Budget allocation changes 2016-2022

## Publics

% of respondents who anticipate an increase in this budget area



Anticipated  
increase

	2016	2022
Digital advertising	61%	61%
Transfer recruitment	40%	42%
Admissions events	36%	54%
Admissions travel	34%	67%
Website development/maintenance	30%	29%

In the 2016 poll we used the term “digital marketing”, in 2022 we used “digital advertising”.