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How to Win in the Graduate and Online Market: Responding to Student Expectations

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Today's Expert Panel

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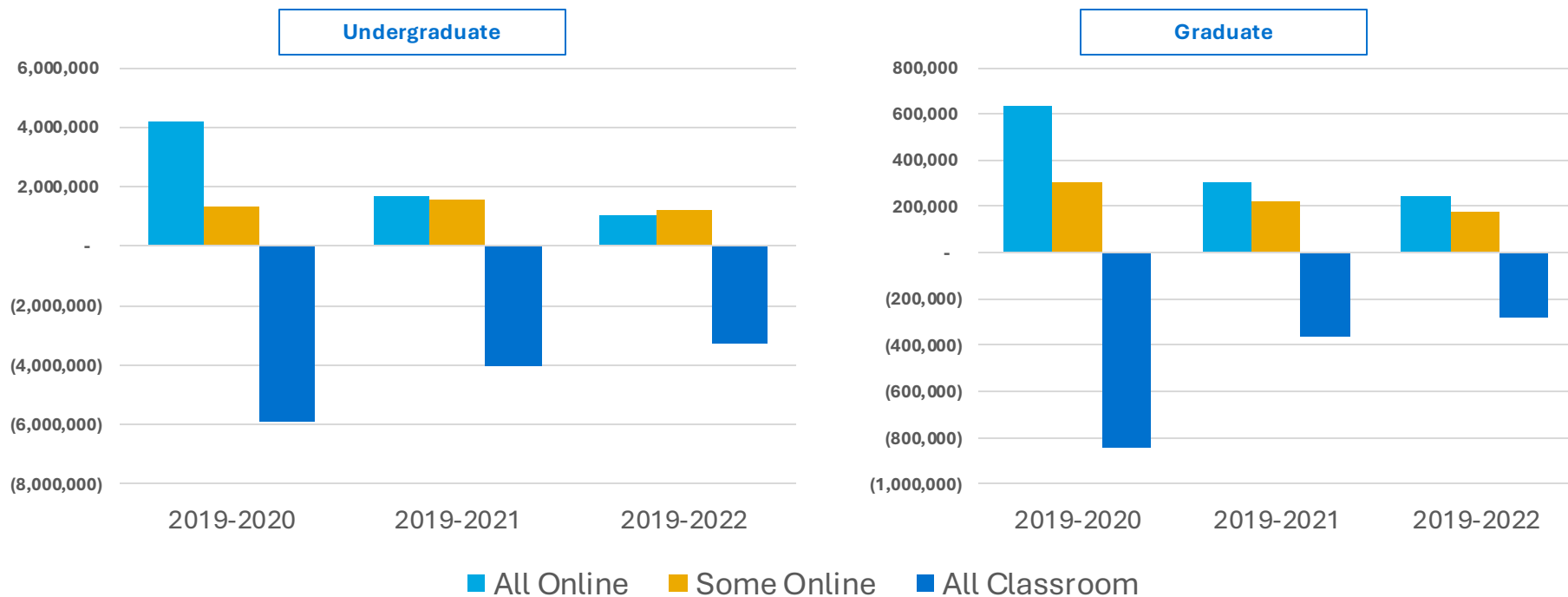University of Texas San Antoni

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What is going on in the U.S. higher education market?

1

Undergrad and Grad students CONTINUE to choose online programs/courses in greater numbers.

Post-Pandemic: Growth by Format Compared with Last Pre-Pandemic Year (2019)

Undergraduate

Graduate

■ All Online　■ Some Online　■ All Classroom

Graduate Enrollment Trends and Format Choice
(With and Without the Pandemic)
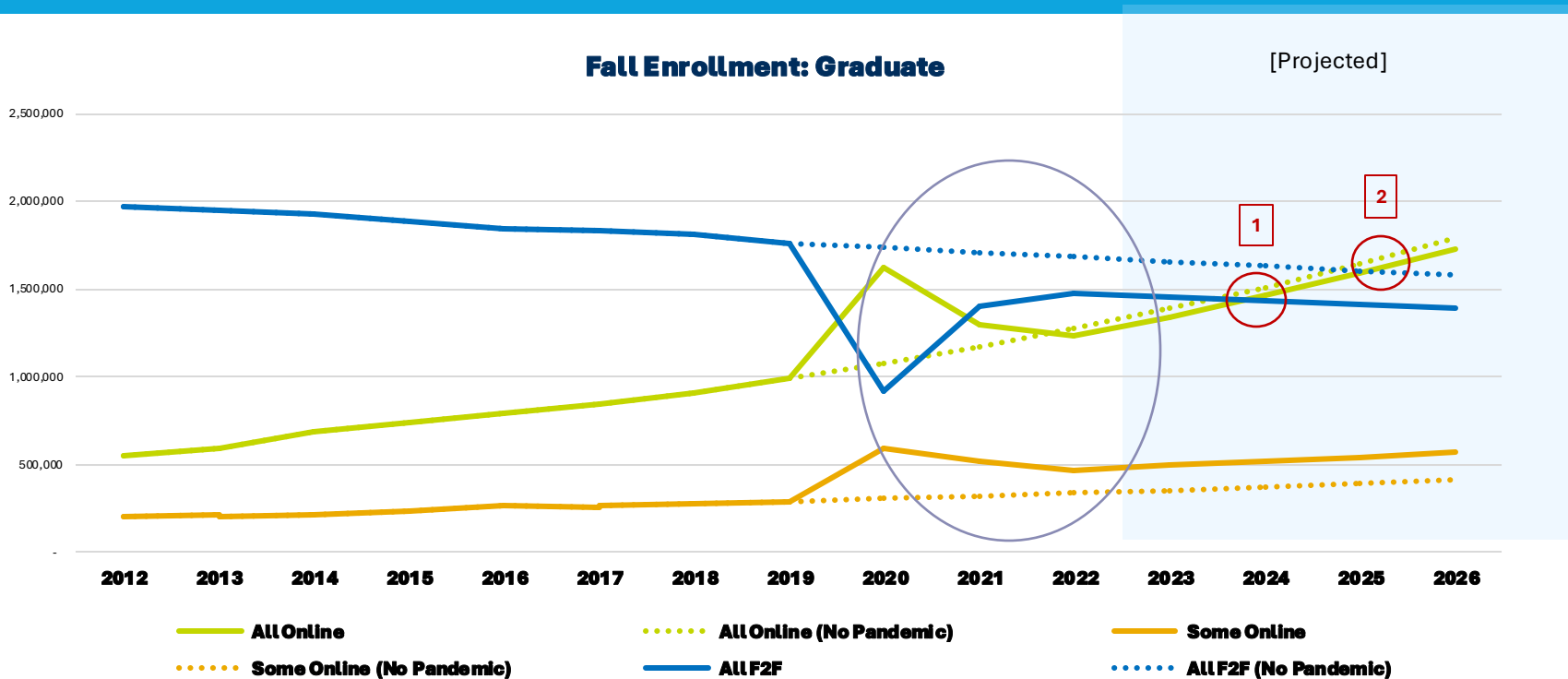
Fall Enrollment: Graduate

[Projected]

Legend:
- All Online
- All Online (No Pandemic)
- Some Online
- Some Online (No Pandemic)
- All F2F
- All F2F (No Pandemic)

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5

Finding and Building the Right Programs

2

1. Focus on degrees (both online and graduate)

Intended Credential

Pie chart (Intended Credential):
- 18% Associate
- 34% Bachelor's
- 24% Master's
- 6% Doctorate
- 3% Professional doctorate
- 6% Undergraduate certificate/certification
- 4% Post baccalaureate certificate/certification
- 6% Graduate certificate/certification
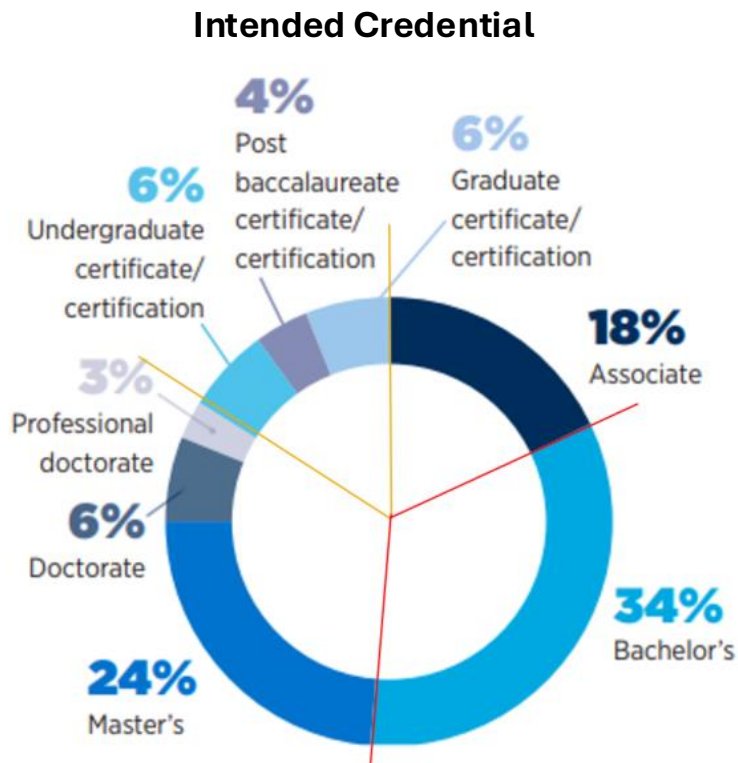
How to Win

Ensure that you have robust online master's AND bachelor's programs, and at the graduate level, master's degrees are the foundation for success.

Certificates have less demand, less ROI, and you are competing with non-higher education operators. Certificates should be "stackable" toward a degree. This is something the non-higher ed providers cannot do.

2. Offer online programs – in high demand topics

INTENDED FORMAT

All Classroom, 18%
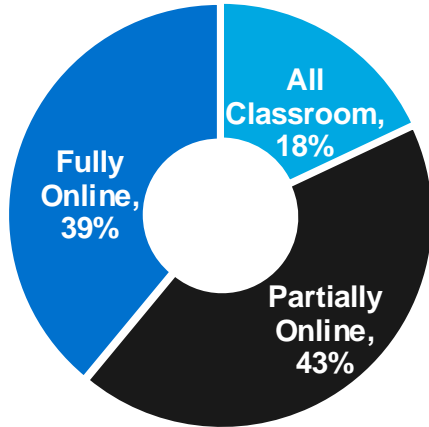
Fully Online, 39%

Partially Online, 43%
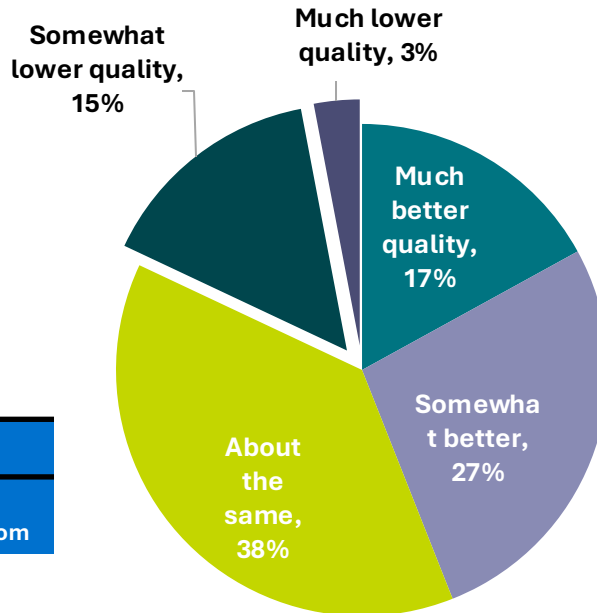
Distance of Furthest Program

	All Online	Partially Online	All Classroom
Within 25 miles	40%	37%	34%

RATING OF QUALITY

Somewhat lower quality, 15%

Much lower quality, 3%

Much better quality, 17%

Somewhat better, 27%

About the same, 38%

How to Win

Programs seeking to materially contribute to enrollment growth must be available online.

Recognize that online delivery is how institutions provide flexibility and convenience today and know that the majority of students who enroll in online study rate it as just as good as past classroom experiences.

3. Focus on high demand degree areas

SUBJECT	ALL
Business	24%
Health Professions	13%
Computer/Information Science	11%
Education	9%
Counseling/Psychology	7%
Arts and Humanities	6%
Social Work/Public Administration	5%
Engineering	5%
Biological/Physical/Earth Sciences	5%
Communications	4%
Criminal Justice/Law/Homeland Security	4%
Social Sciences	3%
Other	5%

How to Win

Offer degree programs primarily in high demand areas (Business, Health Professions, CIS...) followed by emerging subjects (AI, Business Analytics...). Project enrollment growth realistically in first 3 years in order to account for the student market catching up with employer demand. Niche programs reflecting institutional strengths are important, but are unlikely to materially contribute to enrollment growth.

4. Ensure that programs offer accelerated courses

Discussion Slide

Undergraduate
- 11% — 5 weeks or less
- 37% — 6 - 9 weeks
- 22% — 10 - 12 weeks
- 30% — 13+ weeks (full semesters)

Graduate
- 10% — 5 weeks or less
- 49% — 6 - 9 weeks
- 23% — 10 - 12 weeks
- 19% — 13+ weeks (full semesters)

Legend:
- 5 weeks or less
- 6 - 9 weeks
- 10 - 12 weeks
- 13+ weeks (full semesters)
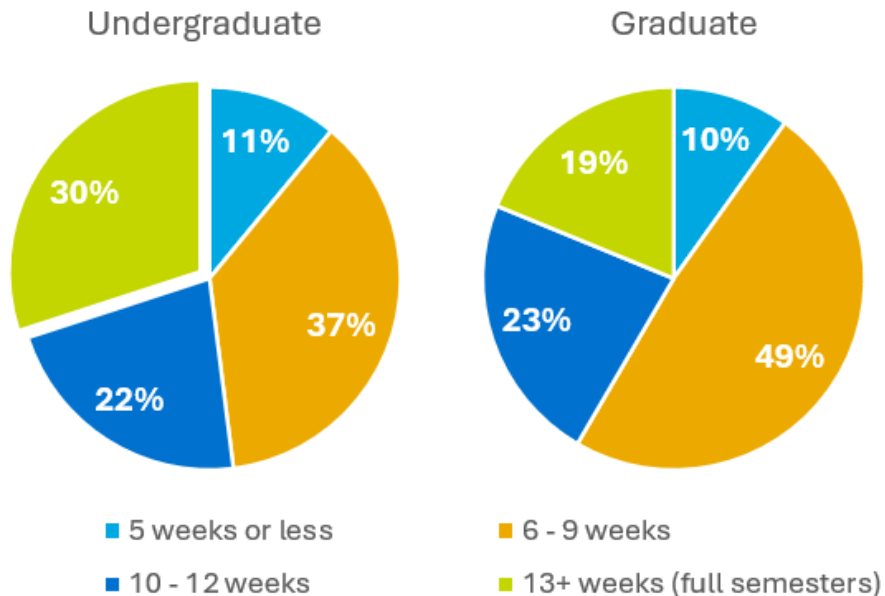
In how many courses do/will you enroll each term?		
1	11%	13%
	Undergraduate	**Graduate**

Source: 2024 Online Student Recruitment Report, RNL

How to Win

Offer online (and hybrid) degree programs in high demand areas (Business, Health Professions, CIS...) rather than niche areas for which there may be less internal resistance but also less student demand.

5. Online programs should be moderately structured, with optional convenings

Self-Paced v/ Structured

Undergraduate

44% / 56%

Graduate

48% / 52%

- ■ Self-paced (few deadlines during each course)
- ■ Structured (regular due dates/deadlines for each course)

Synchronous Activity

Undergraduate

12% / 41% / 47%

Graduate

11% / 44% / 44%

■ Yes, the meetings are required   ■ Yes, the meetings are optional   ■ No

Source: 2022 Online Student Recruitment Report, RNL
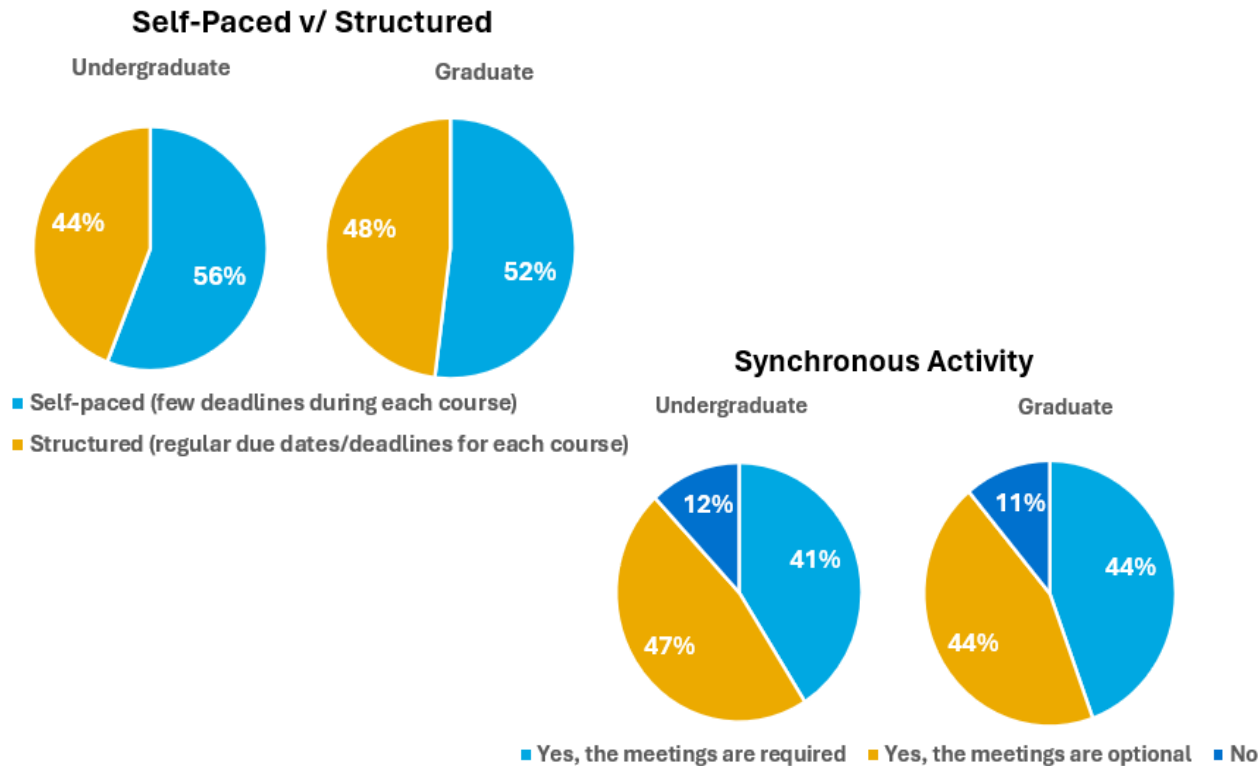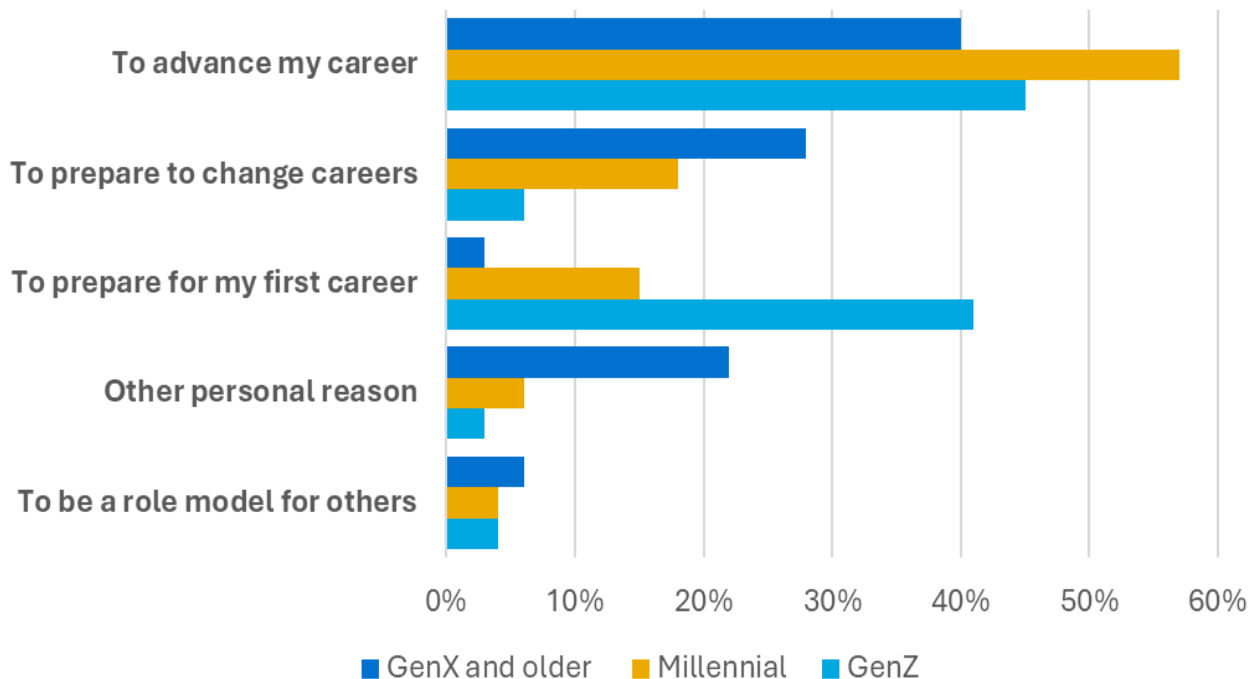
How to Win

Online students want both self-paced and structured elements, and express interest in synchronous convenings (which should be optional.) The ability to connect synchronously alleviates some concerns about online study, although once enrolled these convenings are rarely accessed.

Effectively Positioning Your Programs

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6. Career preparation must be at the core of positioning – and curriculum

Chart: Reasons for enrollment by generation (GenX and older, Millennial, GenZ)

- To advance my career
- To prepare to change careers
- To prepare for my first career
- Other personal reason
- To be a role model for others

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%

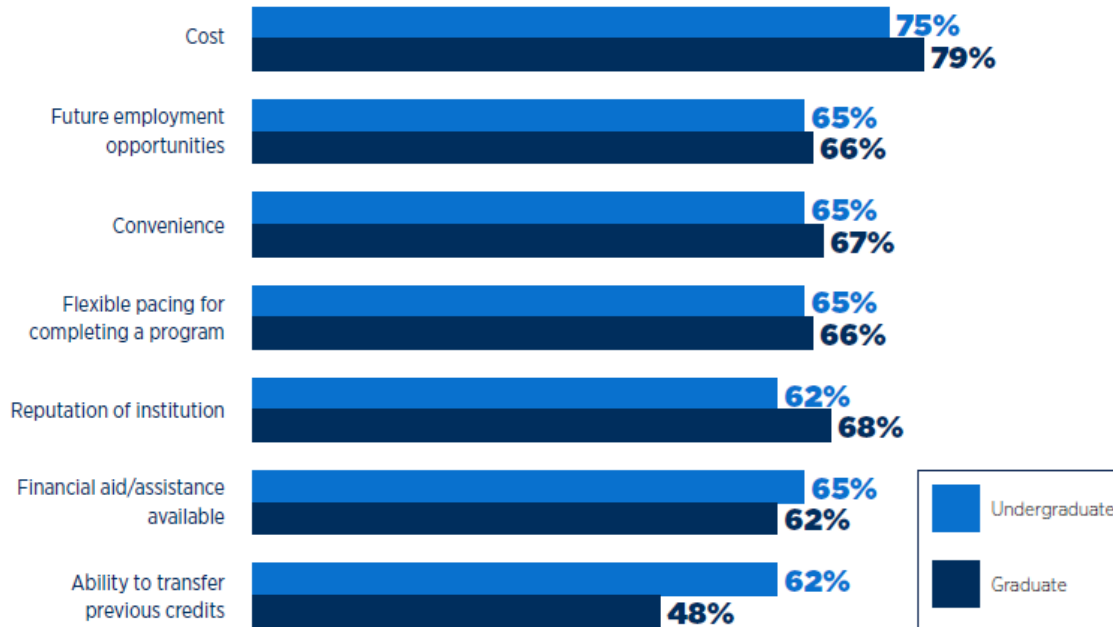Legend: ■ GenX and older ■ Millennial ■ GenZ

How to Win

90+ percent of students enroll for career reasons. Positioning and curriculum that does not make future career success (think ROI) THE priority will not win. Avoid imagery of grads in caps and gowns in favor of people in work situations.

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7. Focus messaging on cost, employment, and flexibility

Discussion Slide

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

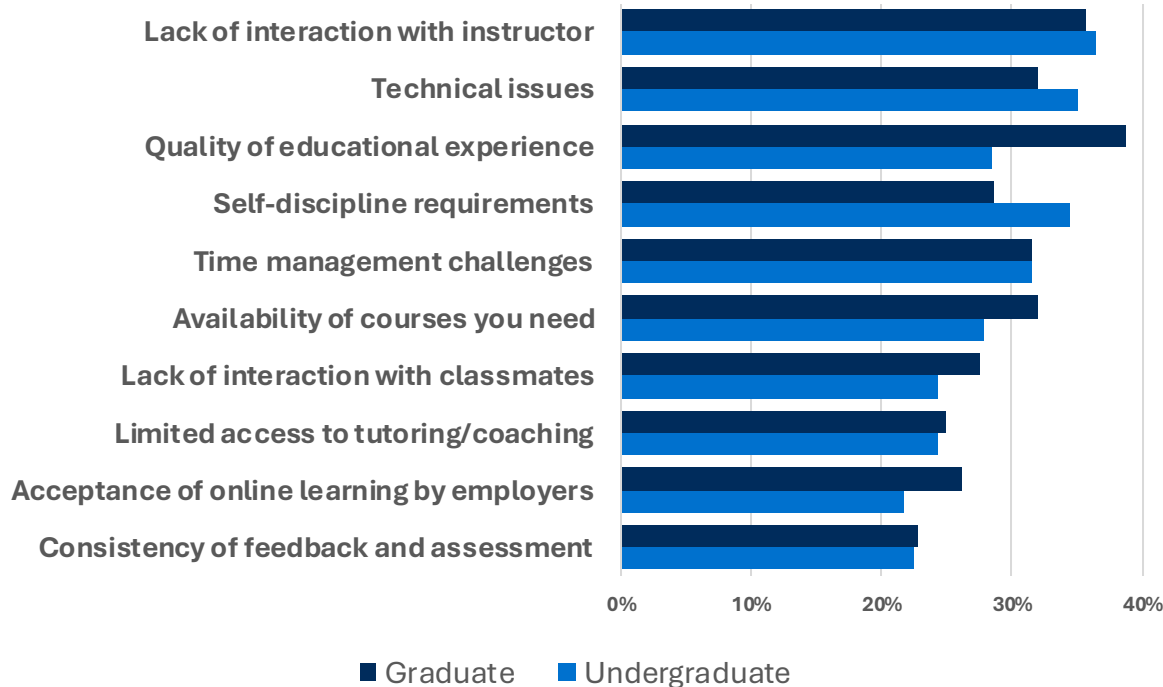|	Undergraduate	Graduate
Cost	75%	79%
Future employment opportunities	65%	66%
Convenience	65%	67%
Flexible pacing for completing a program	65%	66%
Reputation of institution	62%	68%
Financial aid/assistance available	65%	62%
Ability to transfer previous credits	62%	48%

How to Win

Program positioning should reflect student focus on total cost, future employment, and flexibility. This means both positioning to these concerns and offering programs that require as few credits as possible (less $), accept previous credit, showcase the success of recent graduates, and offer flexible formats.

Source: 2023 Graduate Student Recruitment Report, RNL

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8. Address concerns with engagement and technology

Discussion Slide

Concerns about online study

Concern	
Lack of interaction with instructor	
Technical issues	
Quality of educational experience	
Self-discipline requirements	
Time management challenges	
Availability of courses you need	
Lack of interaction with classmates	
Limited access to tutoring/coaching	
Acceptance of online learning by employers	
Consistency of feedback and assessment	

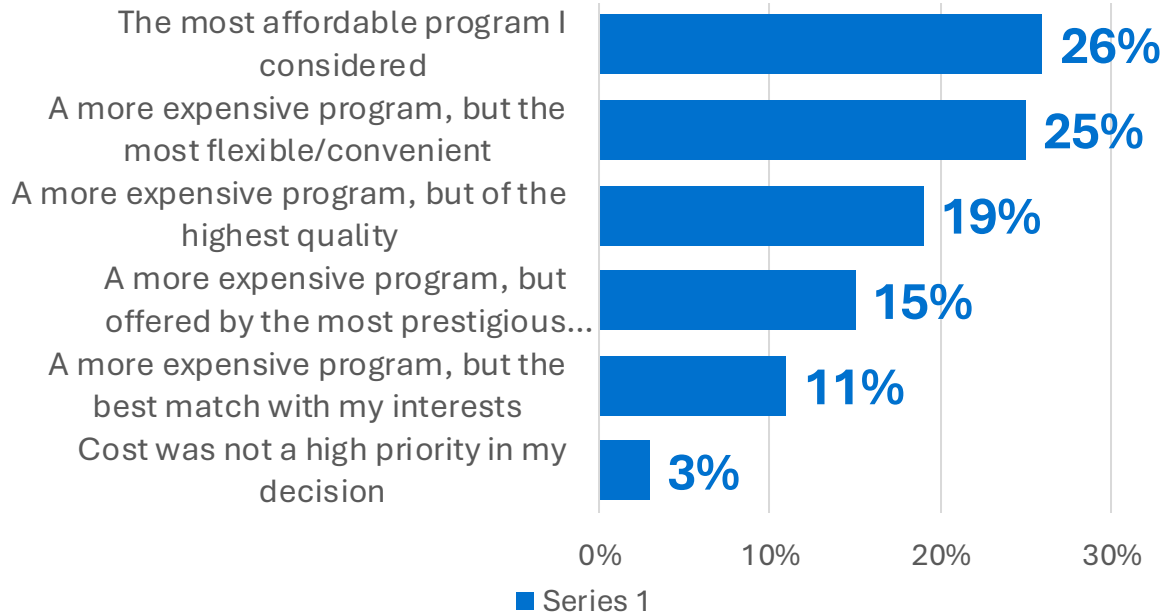0%   10%   20%   30%   40%

■ Graduate   ■ Undergraduate

How to Win

The proportion of online students with ANY concerns has decreased considerably in recent years. Messaging and positioning should address HOW students will interact with their instructors (and peers), WHAT type of access they will have to tech assistance, and WHY the program is of high quality.

9. ROI messaging should focus on flexibility and convenience

Balancing Cost with Other Factors

I enrolled in:

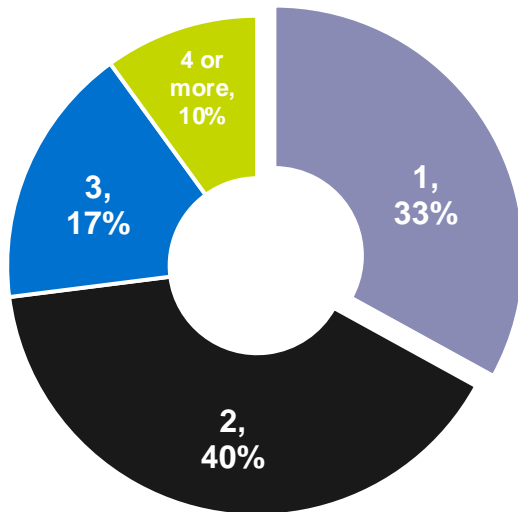|	
The most affordable program I considered	**26%**
A more expensive program, but the most flexible/convenient	**25%**
A more expensive program, but of the highest quality	**19%**
A more expensive program, but offered by the most prestigious...	**15%**
A more expensive program, but the best match with my interests	**11%**
Cost was not a high priority in my decision	**3%**

0%   10%   20%   30%
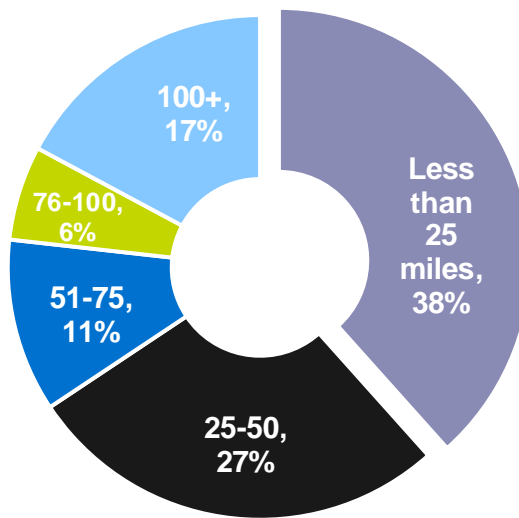
■ Series 1

How to Win

Only 26 percent enroll in the least expensive program, so if you are less affordable focus on flexibility, content match, but do not over-rely on the "prestige" factors unless you truly ARE the prestige provider in your region or program area.

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10. Know your local competitors and how you differentiate

How Many Programs

- 1, 33%
- 2, 40%
- 3, 17%
- 4 or more, 10%

How Far Away

- Less than 25 miles, 38%
- 25-50, 27%
- 51-75, 11%
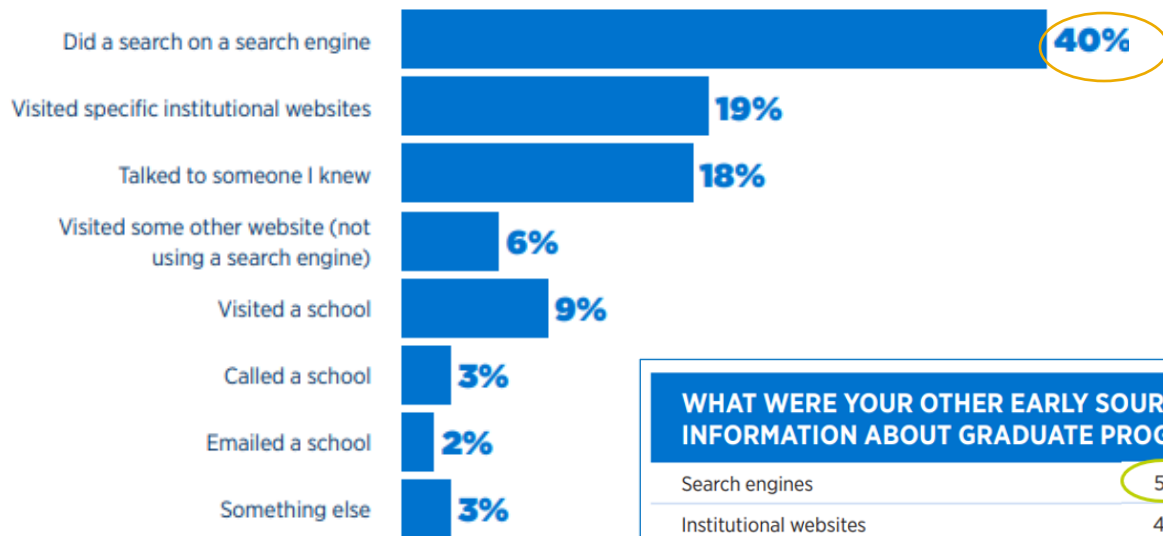- 76-100, 6%
- 100+, 17%

How to Win

Unlike a decade ago, you are not the only program being considered, so focus on "selling" your program in relation to others. Know your competitors (at the program level), know your value propositions, and be ready to compare and contrast with competitors. Also understand that while another regional program may not be one of your "peers" you are likely competing with them for students.

Source: 2023 Graduate Student Recruitment Report, RNL

Market Your Programs with the Required Sophistication

4

11. SEO must be at the center of marketing efforts

First Step in Program Search

Did a search on a search engine	40%
Visited specific institutional websites	19%
Talked to someone I knew	18%
Visited some other website (not using a search engine)	6%
Visited a school	9%
Called a school	3%
Emailed a school	2%
Something else	3%

WHAT WERE YOUR OTHER EARLY SOURCES OF INFORMATION ABOUT GRADUATE PROGRAMS?

Search engines	52%
Institutional websites	49%
Printed materials from institutions	23%
Ads on social media sites	21%
Other websites	21%
Videos on YouTube or elsewhere	19%

How to Win

A multi-channel integrated marketing campaign must have SEO – paid and organic at its heart. 90+ percent of students use search engines as either their first or second step.

Source: 2023 Graduate Student Recruitment Report, RNL

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12. Marketing should incorporate digital and traditional media

6 of the 10 most frequent search methods are digital marketing.

Lower usage but important to include in the mix

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

How to Win

While digital channels are most frequently cited as sources in program search, as much as one-third of students use more traditional methods. To find them where they are, marketing must include both.

Source: 2022 Online Student Recruitment Report, RNL

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13. Develop program-specific personas for engagement

Did you click on digital ads during search?

👍 **60%** Yes

👎 **40%** No

WHY DID/WILL YOU CLICK ON ADS?	ALL
It was for a school I am interested in and the ad reminded me that I needed to take the next step.	35%
I'm aware of this school but didn't know anything about their programs	25%
I didn't know about the school and I wanted to learn more	24%
The ad "copy" was intriguing to me and made me want to click	15%

How to Win

While 60% of students click on digital ads, this is more likely to be due to retargeting efforts than that the copy of the ad attracted the student's attention. Aligning ad copy and imagery with personas developed for each program will increase conversion.
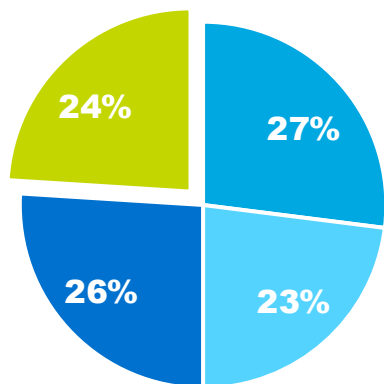
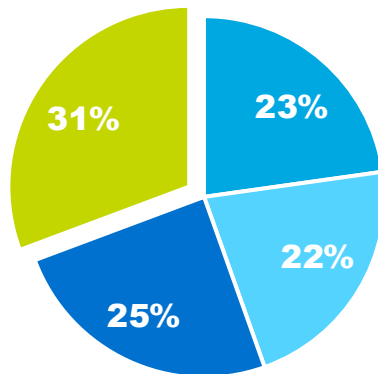# Getting Results From Your Marketing and Recruitment

5

14. Respond quickly – within minutes or hours

Expected Inquiry Response Time – UG

Expected Inquiry Response Time - Grad

UG pie chart:
- 27%
- 24%
- 26%
- 23%

Grad pie chart:
- 23%
- 31%
- 22%
- 25%

- Immediately
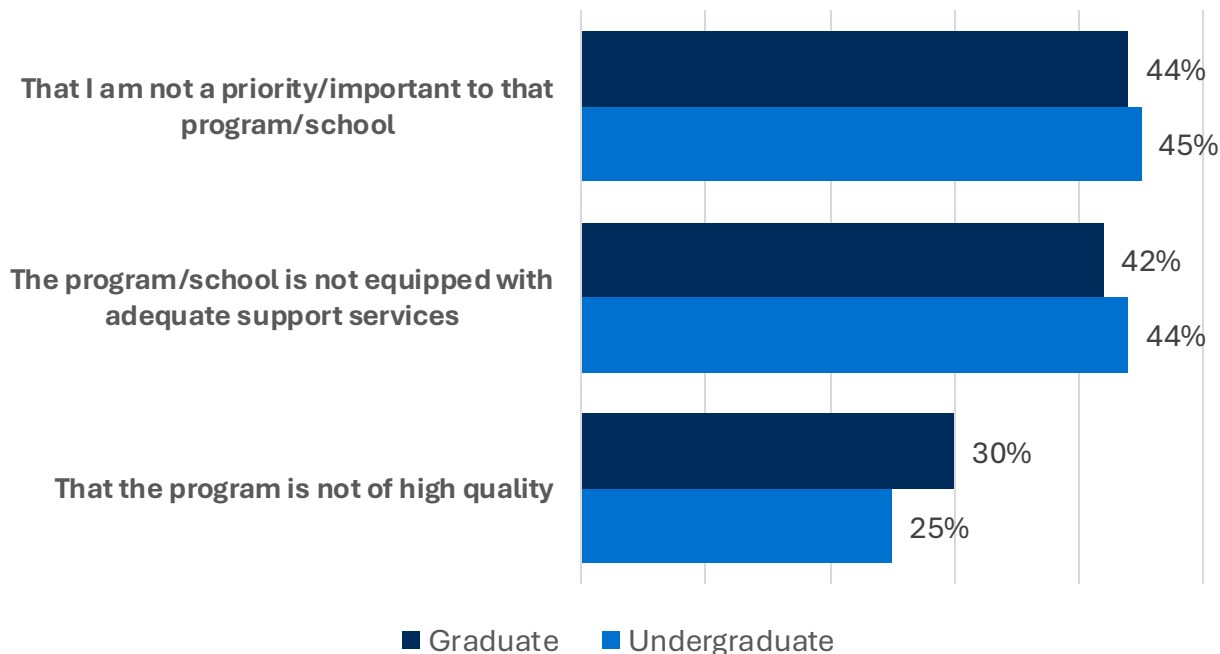- Within 3 hours
- Within 24 hours
- More than 24 hours

How to Win

Students (both young or old) expect response times akin to any other service they access. Responding within minutes (or hours) is essential in both satisfying the student AND ensuring they have a positive attitude about your program. This significantly increases the likelihood of enrollment.

Source: 2022 Online Student Recruitment Report, RNL. Data represent an average of expected response time by email, text, and phone.

15. Slow response risks a negative first impression

What does a slower than expected response signify to you?

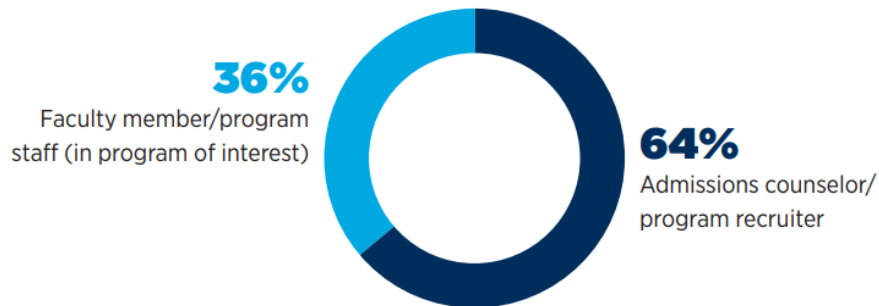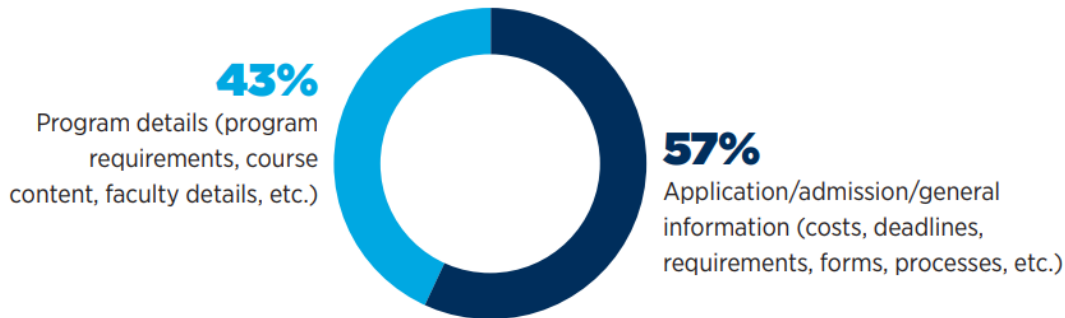| Statement	Graduate	Undergraduate
That I am not a priority/important to that program/school	44%	45%
The program/school is not equipped with adequate support services	42%	44%
That the program is not of high quality	30%	25%

■ Graduate ■ Undergraduate

How to Win

Response times that take longer than expectations result in diminished interest and create negative impressions. Only one in three will completely "forgive" a slow response, while nearly half will think you don't value them.

Source: 2024 Online Student Recruitment Report, RNL

16. Use professional recruiters for early follow up, contact

Follow Up: Who

36%
Faculty member/program staff (in program of interest)

64%
Admissions counselor/ program recruiter

Follow Up: What

43%
Program details (program requirements, course content, faculty details, etc.)

57%
Application/admission/general information (costs, deadlines, requirements, forms, processes, etc.)
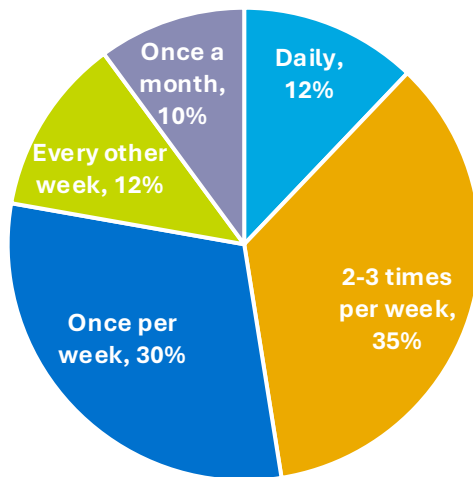
How to Win

Many decentralized enrollment offices rely on faculty or other program staff to respond to inquiries. This is often ineffective (in ensuring quick follow up) but also unnecessary, as students prefer a recruiter, and the information they need is general.

Source: 2023 Graduate Student Recruitment Report, RNL

17. Create communications flows that engage prospects with relevant content in multiple channels

Follow Up: How

- "Snail" mail, 7%
- Phone call, 13%
- Text message, 18%
- Non-personalized email, 6%
- Personalized email, 54%

Follow Up: How Often

- Once a month, 10%
- Daily, 12%
- Every other week, 12%
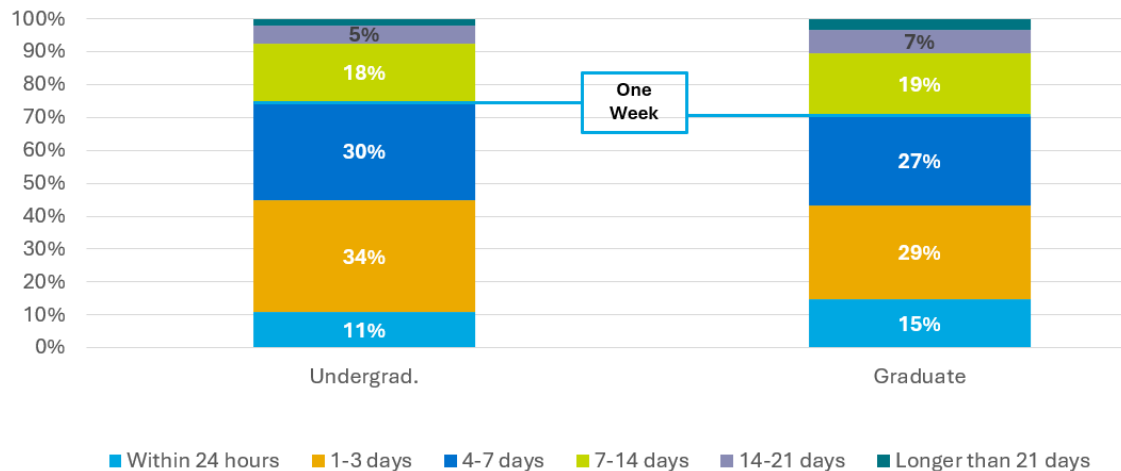- 2-3 times per week, 35%
- Once per week, 30%
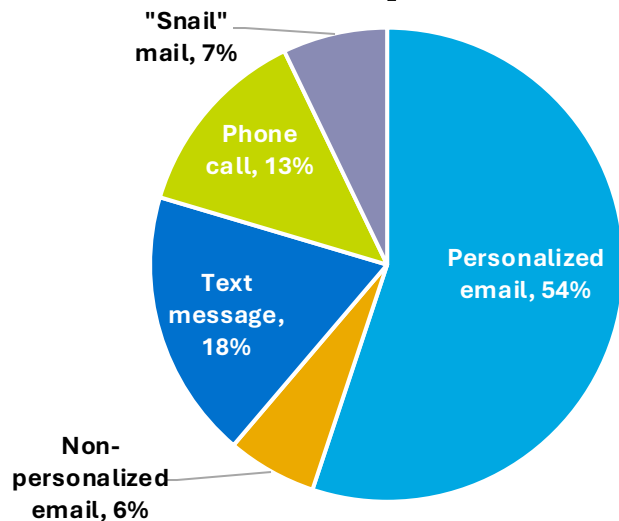
How to Win

After first engagement, prospective students seek regular contact (once per week, after an initial period of more regular contact). Mix up your channels (add in text and leave phone messages) to ensure you catch them where they are at any given moment.

19. Ensure your admissions notification is as close to one week as possible

How quickly do you expect an admissions decision from your online program of choice?

	Undergrad.	Graduate
Within 24 hours	11%	15%
1-3 days	34%	29%
4-7 days	30%	27%
7-14 days	18%	19%
14-21 days	5%	7%
Longer than 21 days		

One Week

■ Within 24 hours ■ 1-3 days ■ 4-7 days ■ 7-14 days ■ 14-21 days ■ Longer than 21 days
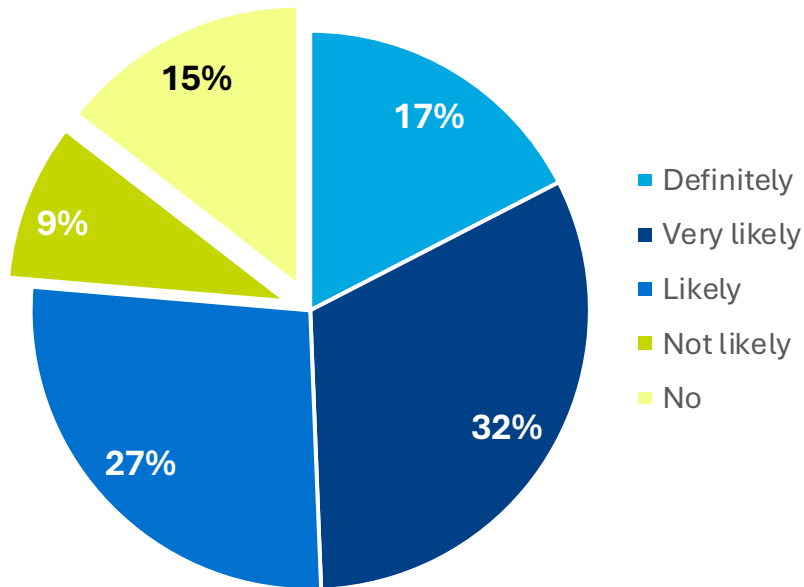
How to Win

Admissions processes must be streamlined. Evaluate every element in your process (and materials required) to see if there is a regulatory or accreditation reason for its inclusion. If not, eliminate. Work with faculty to develop "minimum requirements" criteria that allows admissions office to accept students who clearly meet requirements.

Source: 2022 Online Student Recruitment Report, RNL

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Why is all of this SO important?

Likelihood of Enrolling:
First Program to Respond

- Definitely
- Very likely
- Likely
- Not likely
- No

17%
32%
27%
9%
15%

Likelihood of Enrolling:
First Program to Admit

- Definitely
- Very likely
- Likely
- Not likely
- No

21%
33%
31%
11%
5%
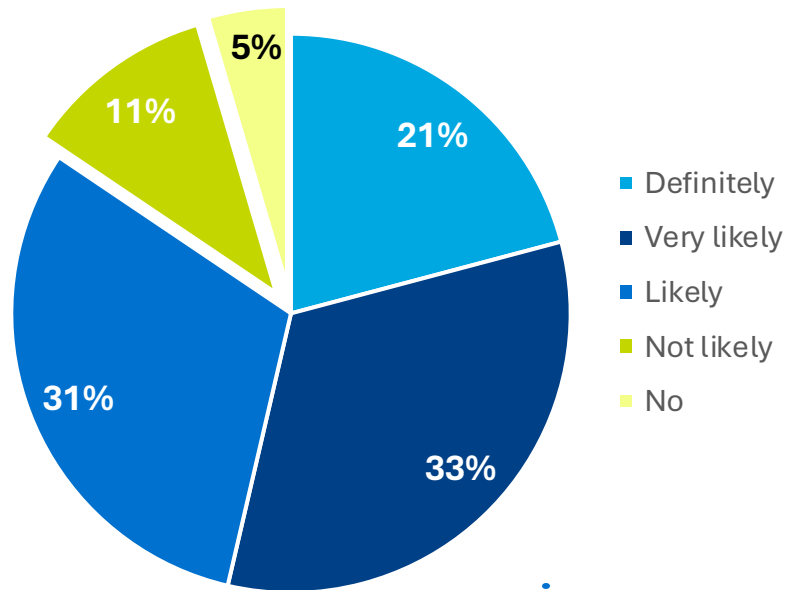
Complimentary Consultation

RNL's 2024 Online Student Recruitment Report

Consult Goal: We want to help you succeed. Your RNL expert will guide you through a discussion matched to your areas of interest and provide insights on how RNL helps institutions ensure that:

1. Recruitment and admissions processes align with expectations.
2. Program promotion addresses student aspirations and concerns.
3. Marketing matches how and when students search.
4. Program structure and features meet student preferences.
5. AI is leveraged to enhance speed, personalization, and other expectations.

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- Price Sensitivity Analysis
- Academic Program Demand
- Financial Aid Modeling

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- Course Development
- Course Assessment
- Course Revision
- Instructional Consulting

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Thank You

Godfrey Gibbison

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