



Meeting the Needs of Online Students

A Review of RNL's Surveys of Online Students and Leaders

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The Student Study:

- 1,609 respondents
(thank you **Plexuss** for your sample)
- Administered February 2022
- Respondent target: those who have searched for an online program in the last 12 months.
- Survey focus:
 - How they search – in detail
 - How they make their decisions
 - Expectations of institutions they contact
 - Program details



2022 Online Student Recruitment Report

10 Challenges and Solutions for
Serving Online Students Today

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2022 Online Program Marketing and Recruitment Practices

Findings from a survey of online program
marketers and recruiters



The Administrator Study:

- 102 institutions participated
- Administered September 2022
- Respondent target:
 - Online program marketing leaders
 - Online programs recruitment leaders
- Representation:
 - 54% Public Institutions
 - 46% Private (non-profit) Institutions

Program Levels:

- 88% offer online Master's
- 62% offer online Bachelor's
- 58% offer online non-degree

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Online Education in Context

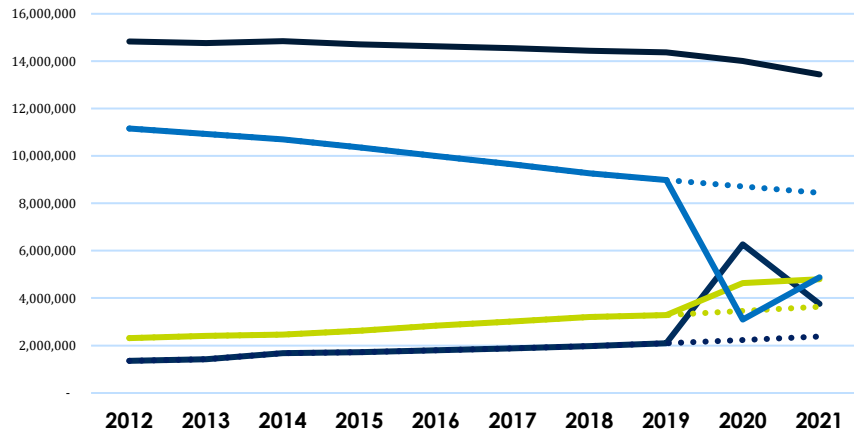


Enrollment Trends and Format Choice

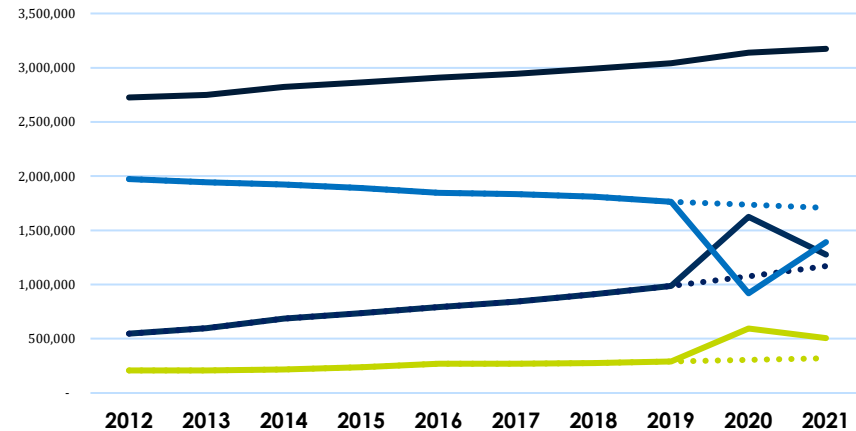
(With and Without the Pandemic)

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?

Undergraduate



Graduate

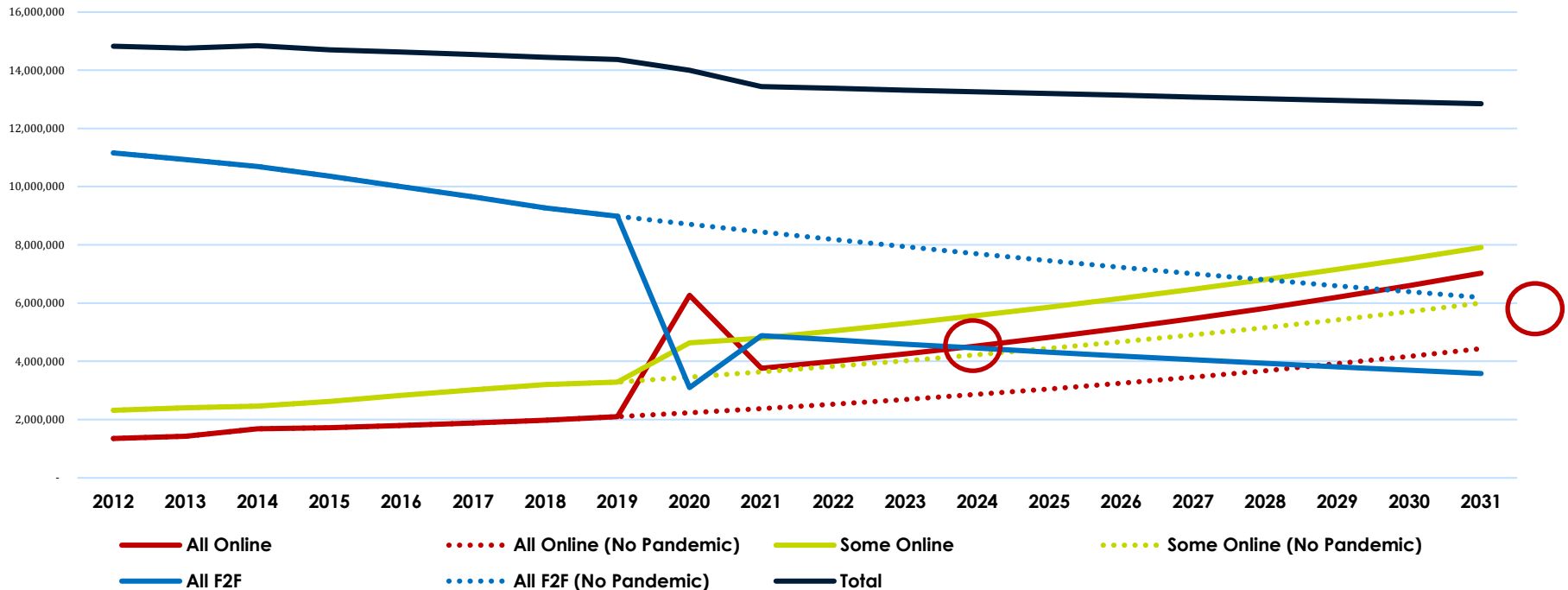


Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

Undergraduate Enrollment Trends and Format Choice

(With and Without the Pandemic)

Fall Enrollment: Undergraduate

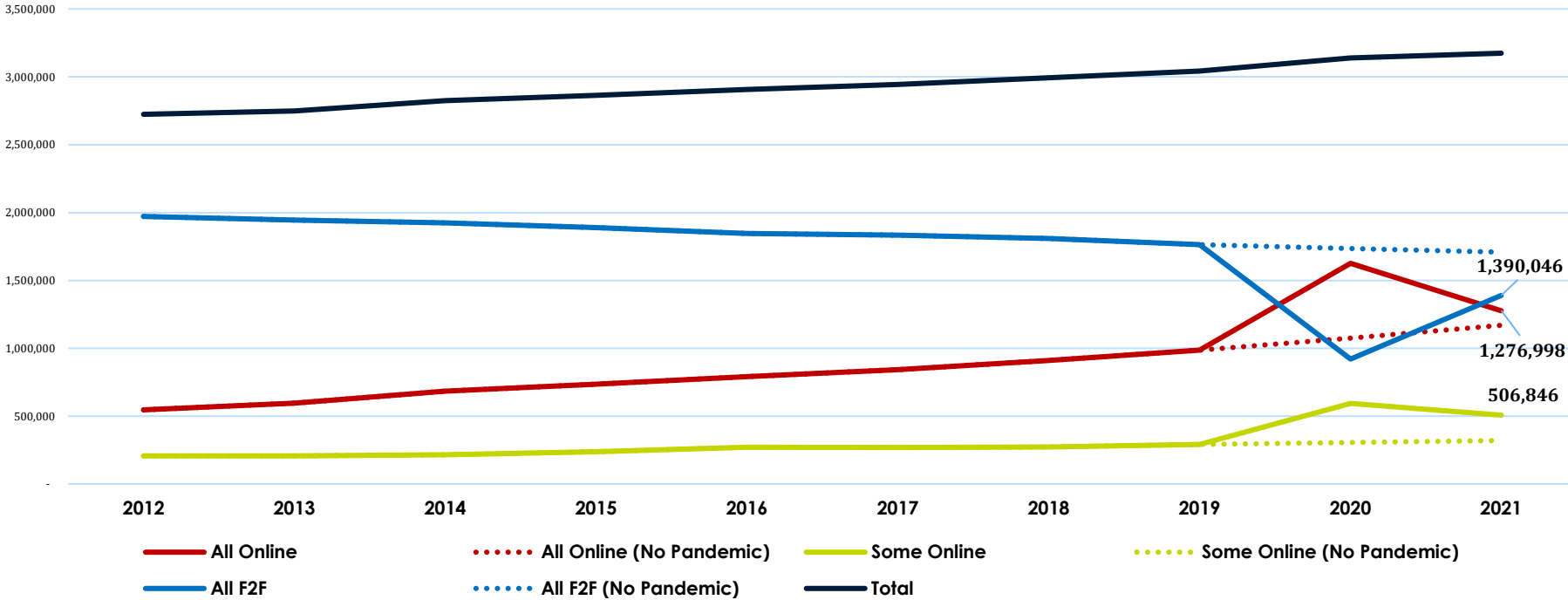


Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

Enrollment Trends and Format Choice

(With and Without the Pandemic)

Fall Enrollment: Graduate



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

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The Online Education Opportunity



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

TABLE 7: INTENDED ONLINE CREDENTIAL

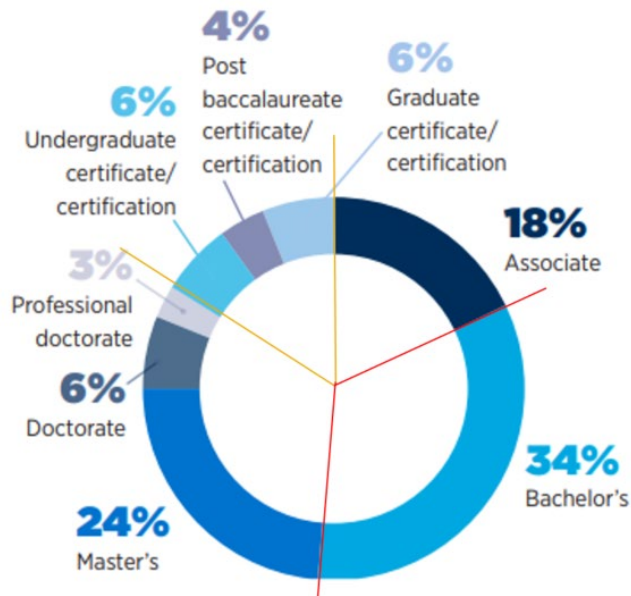
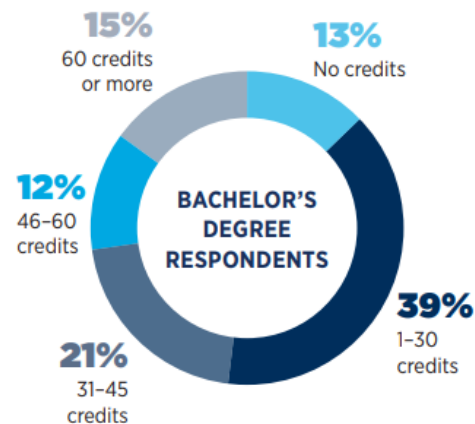


TABLE 8: PREVIOUSLY EARNED UNDERGRADUATE CREDITS (bachelor's degree respondents only)



How institutions match up

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%

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

Offering undergraduate online programs

PUBLIC

78%

PRIVATE

46%

3

What's Hot, What's Not?



There is no single discipline that is the “sure thing.”

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

Online Business students want concentrations



TABLE 10: PLANNING TO ENROLL IN A BUSINESS ADMINISTRATION PROGRAM

(among business student responses)



Will enroll in a concentration:
Undergrad Degree: 90%
Grad Degree: 96%

Detail on Business Programs:

Concentration	Undergrad. Degree	Graduate Degree
Finance	11%	31%
Accounting	26%	8%
Marketing	19%	12%
Human Resources Management	11%	18%
International Business	7%	8%
eCommerce	5%	5%
Computer Information Systems	4%	8%
Other	4%	4%
Healthcare Management	3%	2%

Business Non-Degree Field of Study	Non-Degree
Finance	29%
Accounting	22%
Marketing	7%
Human Resources Management	13%
International Business	7%
eCommerce	11%
Computer Information Systems	0%
Other	2%
Healthcare Management	0%



Online students want shorter courses, two at a time.

TABLE 11: PREFERRED LENGTH OF COURSES

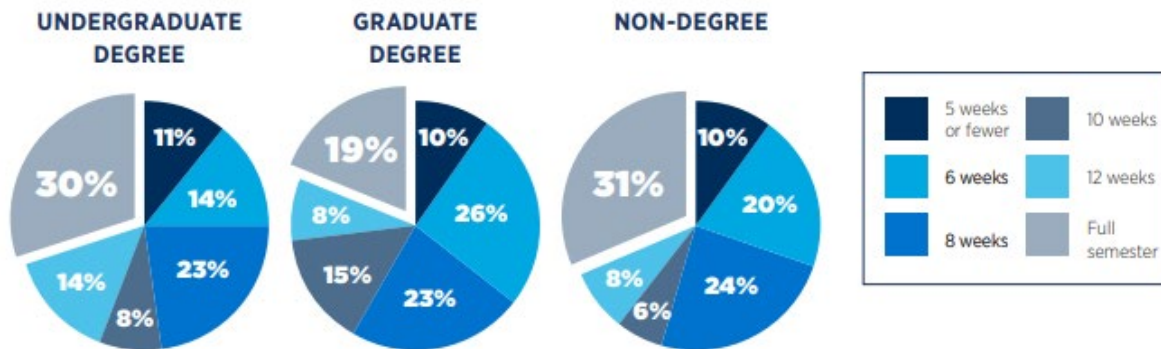


TABLE 12: PREFERRED NUMBER OF COURSES PER SEMESTER/TERM	UNDER-GRADUATE DEGREE	GRADUATE DEGREE	NON-DEGREE
1	17%	21%	30%
2	44%	41%	37%
3	21%	23%	23%
4 or more	17%	15%	11%

Online students are split on self-paced and want some interaction

TABLE 13: PREFERENCE: SELF-PACED OR STRUCTURED

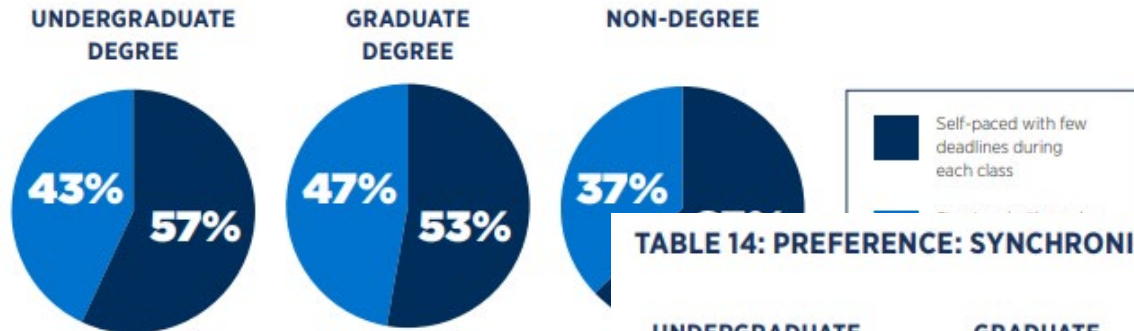
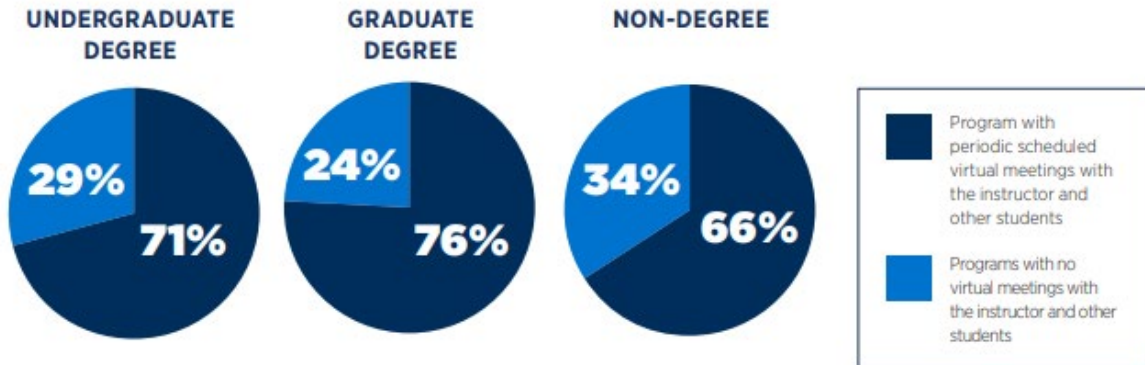


TABLE 14: PREFERENCE: SYNCHRONICITY



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How do you connect
with prospective online
students?



Online students begin their search on search engines



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%

Online programs are well aligned with students in their marketing tactics.

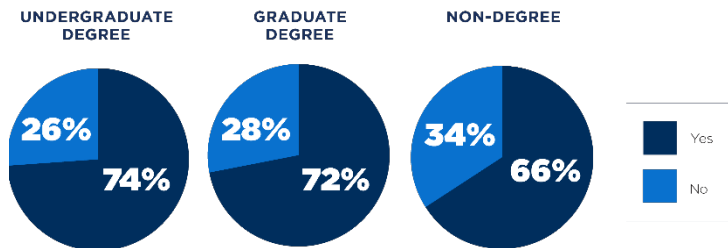
FIRST SOURCES IN ONLINE PROGRAM SEARCH

- Search engines
- College search sites
- Ads on social media
- Someone I know
- Ads on websites
- Ads on streaming TV
- Ads on broadcast or cable TV
- Program ranking websites
- Printed view books, brochures, etc.
- Ads in newspapers, magazines, etc.
- Printed rankings guides, etc.
- Ads on streaming radio
- Billboards and other outdoor ads
- Ads on local broadcast radio
- Ads on Podcasts/other streaming audio

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%
Re-targeted 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 (USPS) 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%

Online students click ads that speak to their “persona”



MOST COMPELLING REASON TO CLICK ON DIGITAL AD

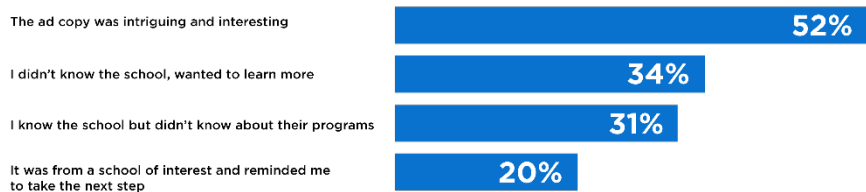
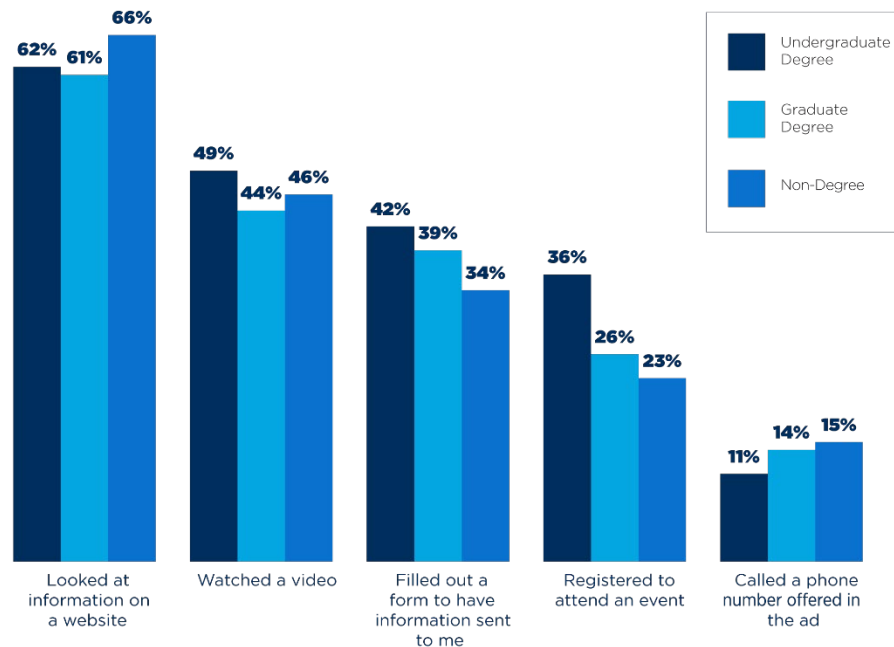


TABLE 19: ACTION AFTER CLICKING DIGITAL ADS



They expect video, virtual recruiting events, and mobile-friendly content.

TABLE 20: WATCHED VIDEOS ON INSTITUTIONAL WEBSITES DURING SEARCH

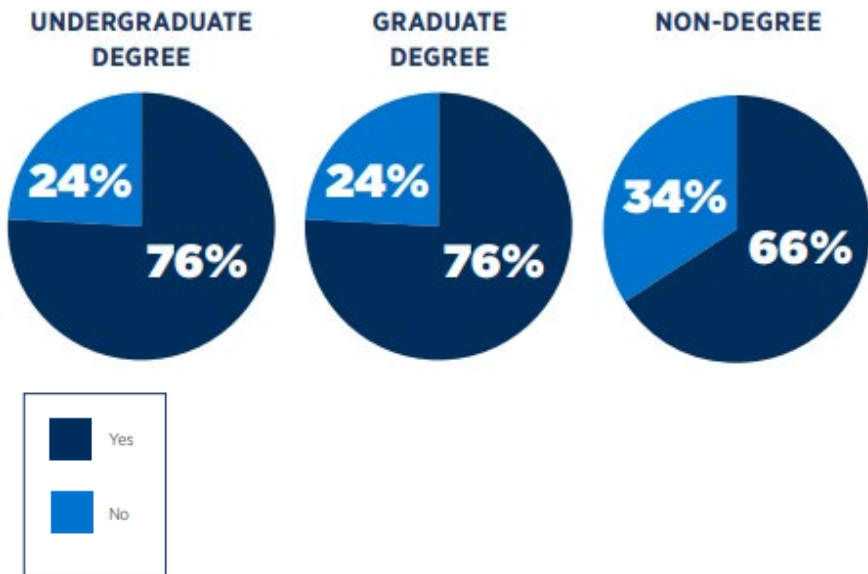
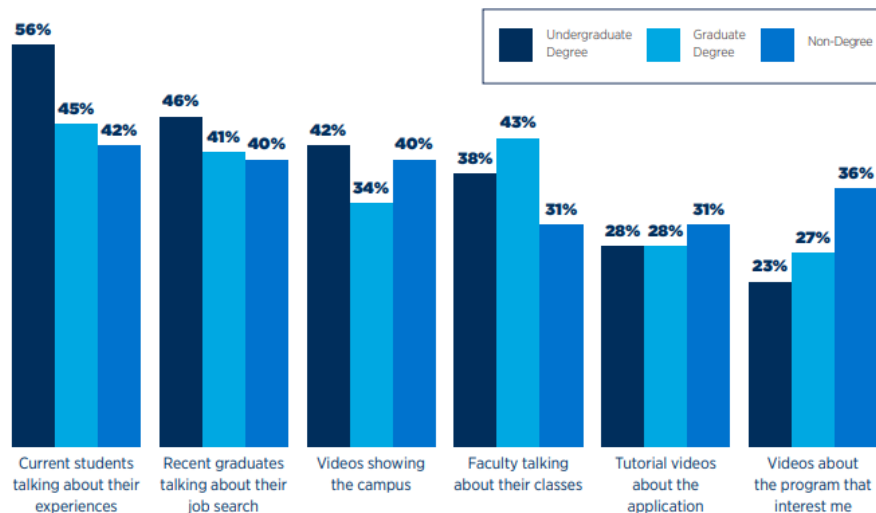


TABLE 21: PREFERRED VIDEO CONTENT



6. They expect video, virtual recruiting events, and mobile-friendly content.

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

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

Online marketing and recruitment operations are getting more and more centralized.

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

Centralized
undergraduate
marketing
71%

Centralized
undergraduate
recruitment
70%

Centralized
graduate
marketing
46%

Centralized
graduate
recruitment
47%

About one in six are working with an OPM

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

PUBLIC

15%

PRIVATE

18%

TABLE 9: SERVICES MANAGED BY OPM (not reported by public/private due to small cell size)

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%

Online program marketing budgets are growing

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

PUBLIC AVERAGE

\$1.04M

PRIVATE AVERAGE

\$1.14M

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

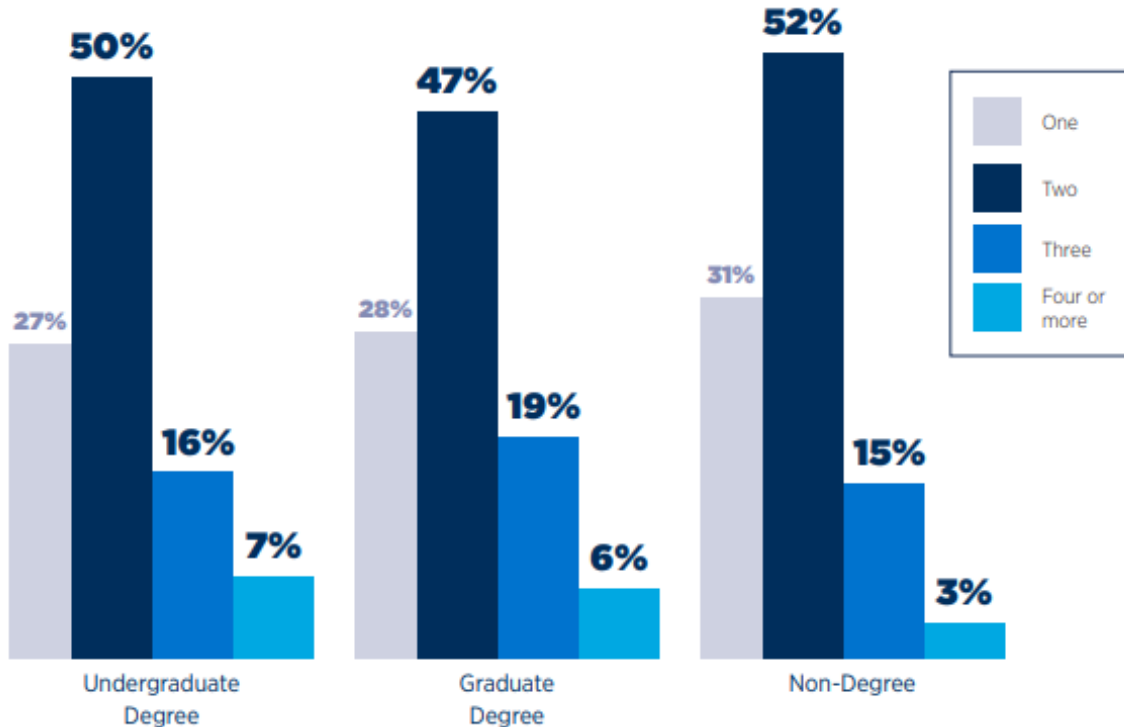
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How do you meet their expectations during the enrollment process?



You ARE competing with more than inertia

TABLE 30: NUMBER OF ONLINE PROGRAMS CONSIDERED



Online students expect a speedy response

TABLE 33: EXPECTED RESPONSE TIMES AFTER FIRST INQUIRY	UNDER-GRADUATE 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 call			
Immediately	29%	24%	25%
Within 3 hours	19%	20%	20%
Within a day	26%	26%	28%
More than 1 day	26%	31%	27%

+45: 41%

+45: 36%

+45: 48%

Response times are picking up

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 within 3 hours

48%

GRADUATE

Institutions responding within 3 hours

48%

Students expecting within 3 hours

39%

Recruitment Operations are relatively small, but the right people are responding to inquiries

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

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%

There is likely insufficient coverage outside of business hours.

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%

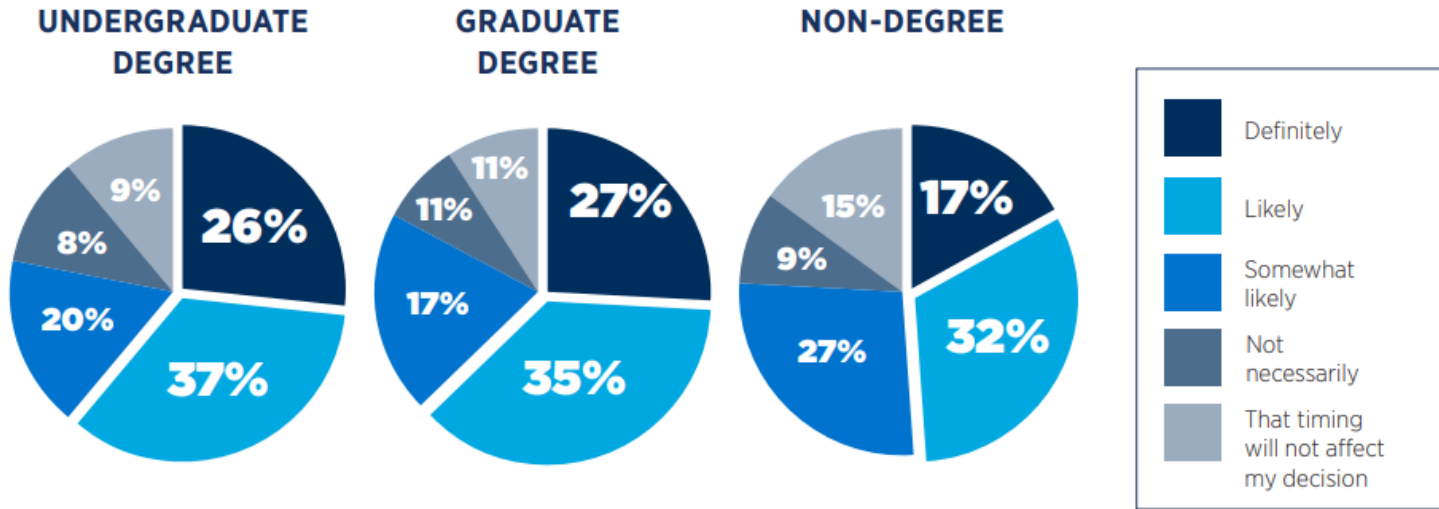
TABLE 23: CHANNELS USED FOR FIRST RESPONSE

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%

Note: See the report for information on ongoing cultivation practices.

Online students reward timeliness

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



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

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

Admissions is taking to long and it likely stymied by faculty making decisions.

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

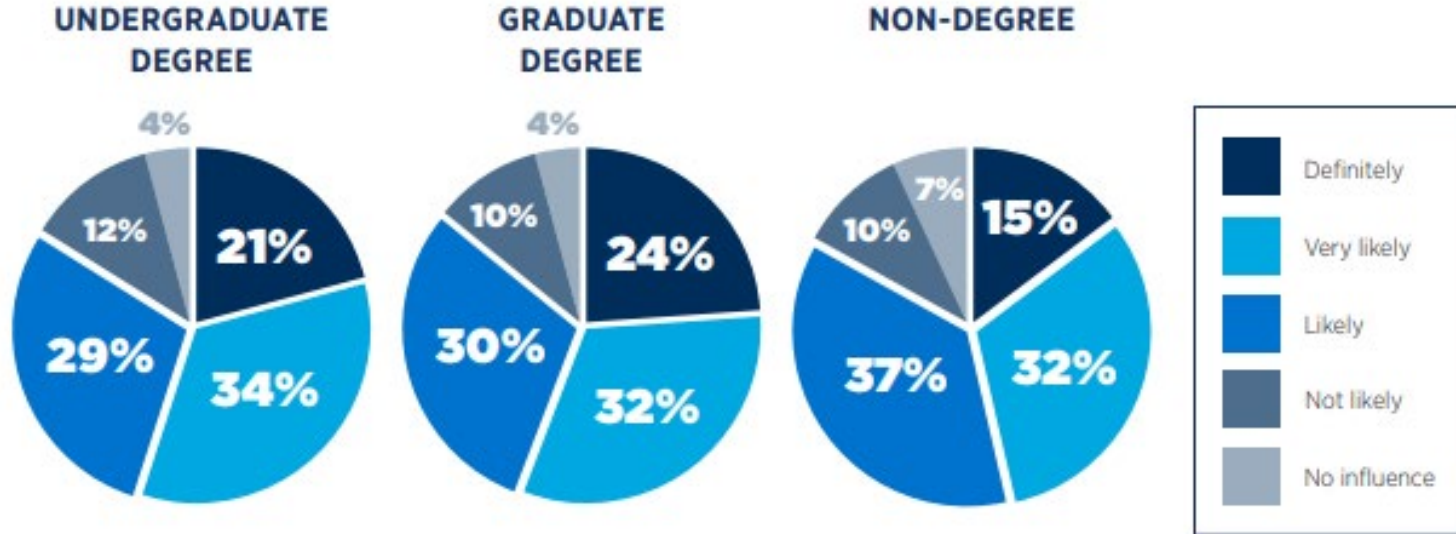
71%

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 Degree	58%	3%	8%	6%	25%
Graduate Degree	14%	5%	23%	10%	48%

Online students enroll where they are admitted first.

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





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