

# RNL Regional Workshop

Graduate and Online Enrollment

WELCOME



# Introductions

Scott Jeffe



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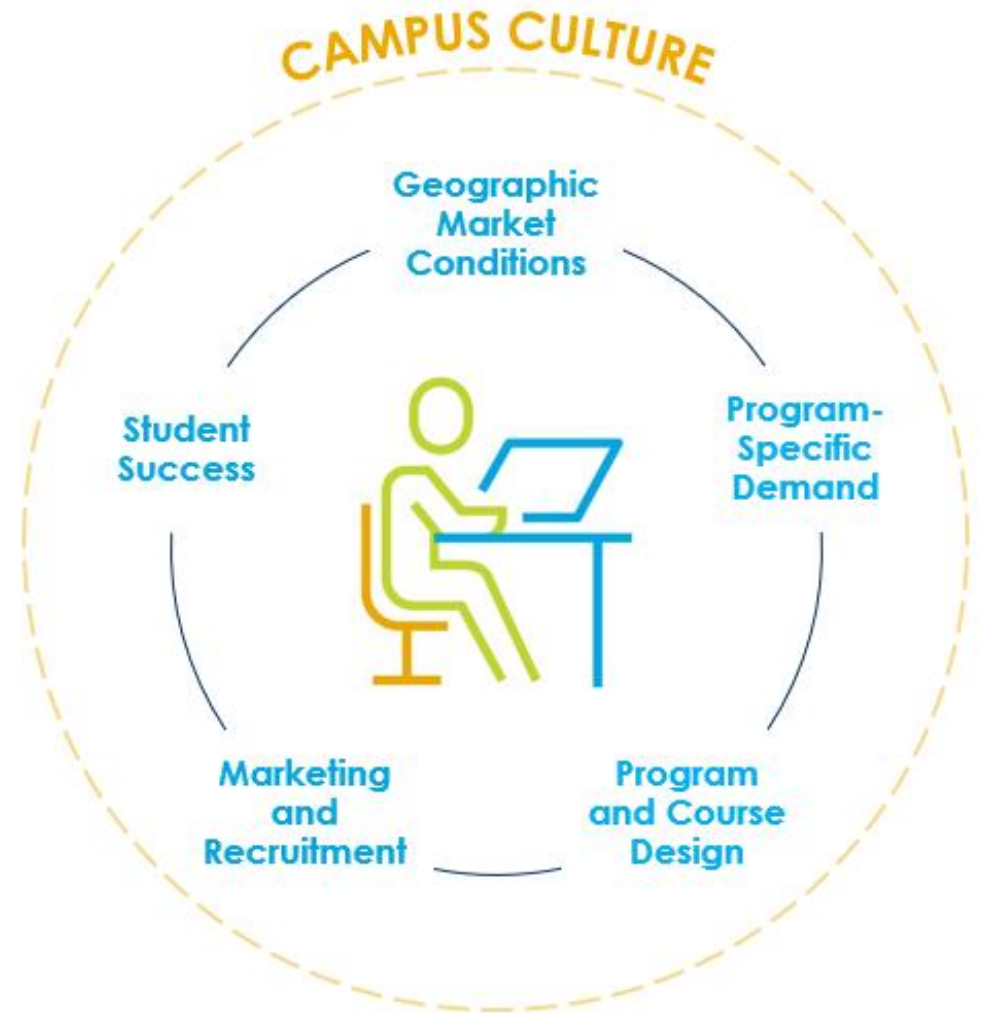


*Read  
more  
about  
us:*

# Goals for today

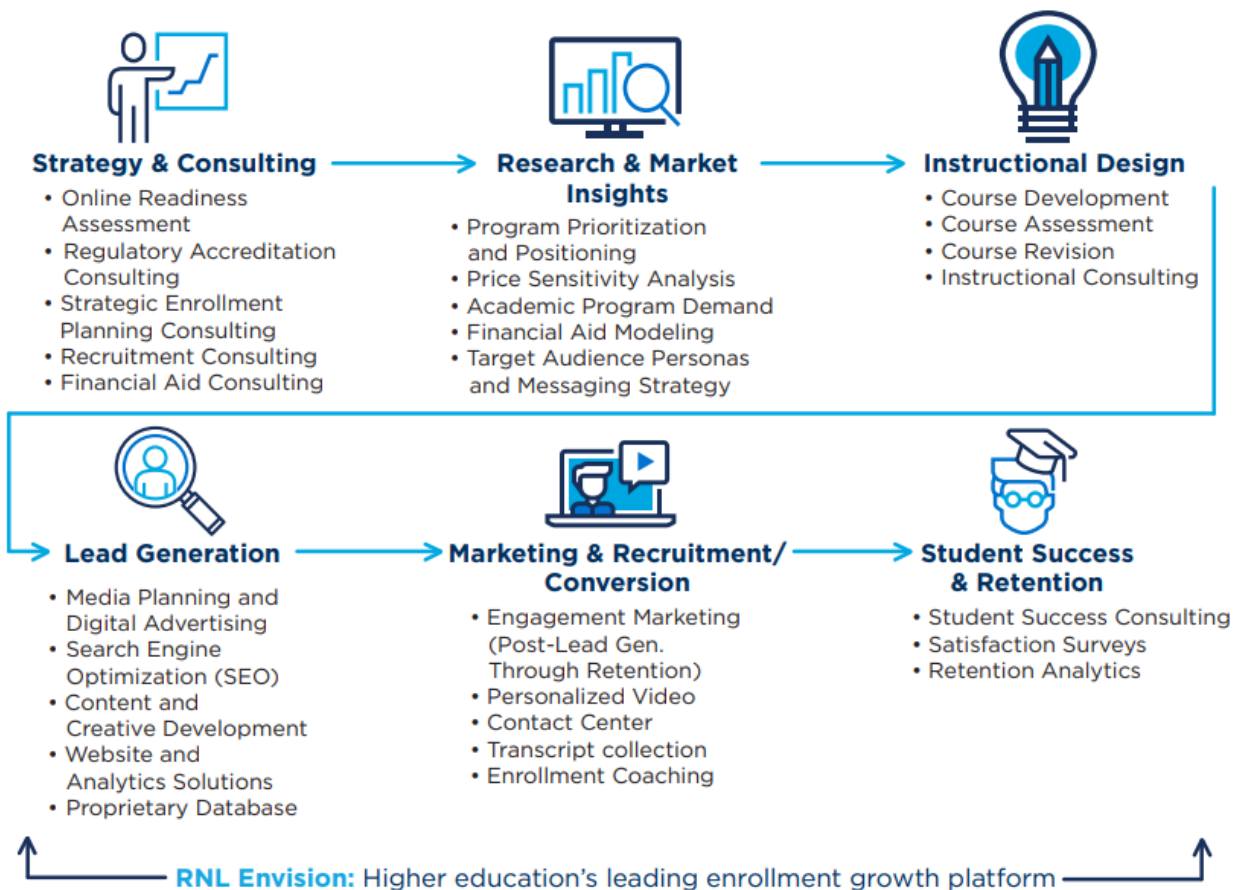
- 1 Connect with colleagues from around your region
- 2 Gain fresh context and research focused on:
  - ✓ Growth factors
  - ✓ Regional geographic and program specific data
  - ✓ Behaviors and expectations in the non-traditional student market
  - ✓ Key characteristics of a high-quality marketing and recruitment plans
  - ✓ Patterns of success we have observed in this market
- 3 Go back to campus energized with **at least** one actionable idea to implement

# Factors Influencing Enrollment



# RNL Enable: The Complete Solution for Graduate Enrollment

Find everything you need from strategy to course design to recruitment. Learn more at: [RNL.com/Enable](https://RNL.com/Enable)

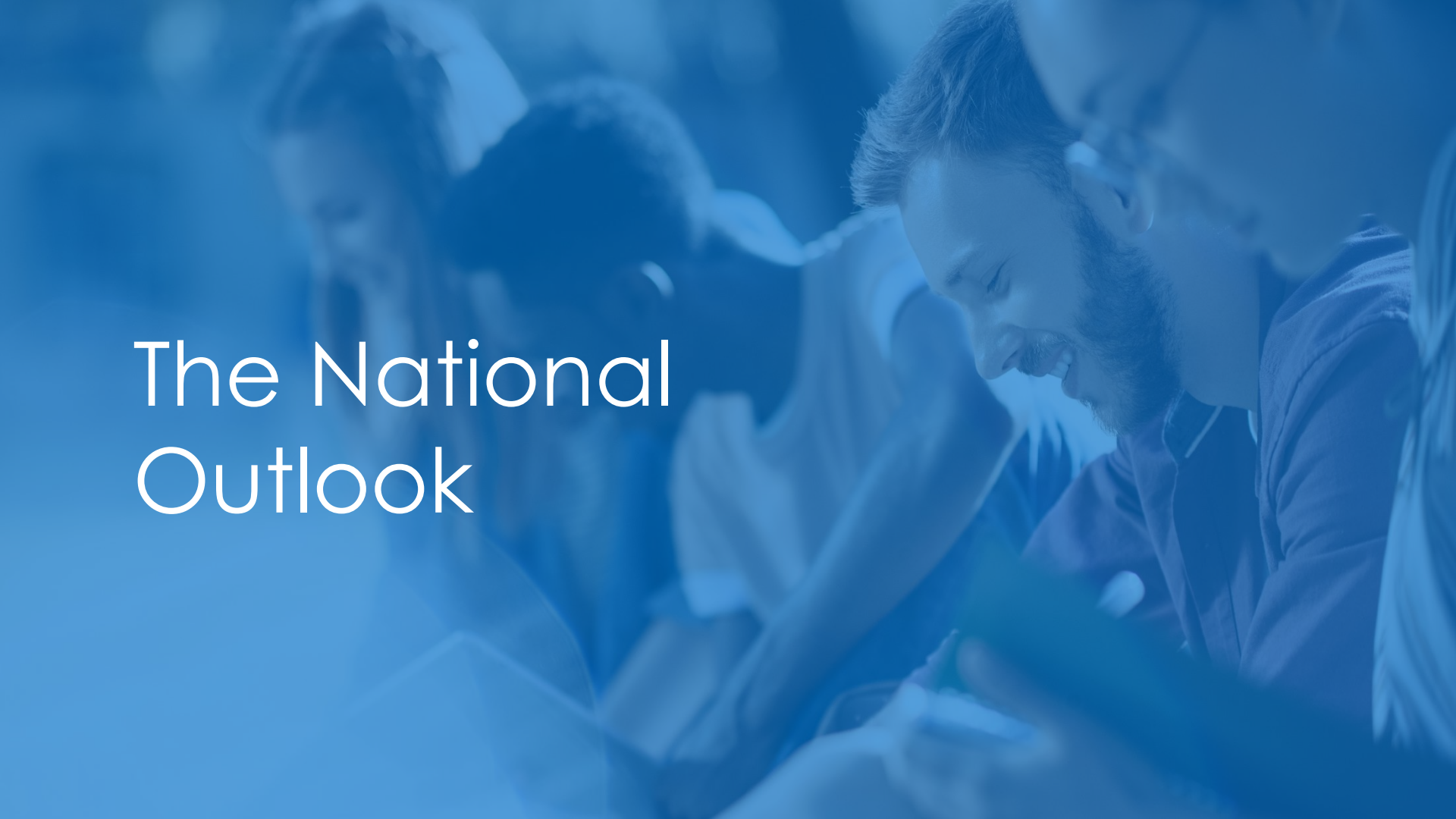


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# Know Your Market:

Regional and National Data To Inform  
Your Strategy

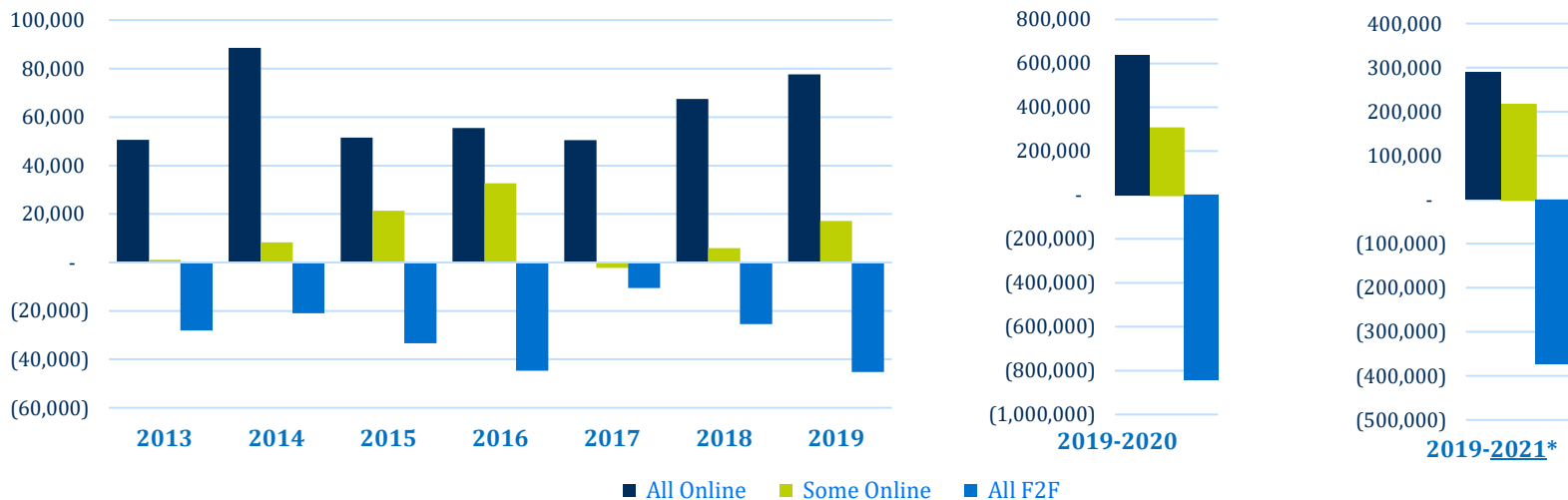


A blue-tinted photograph of a group of people, including a man with a beard, looking at a laptop screen together. The image is overlaid with a semi-transparent blue filter. The text 'The National Outlook' is written in white on the left side of the image.

# The National Outlook

# No surprise that online education has become “mission critical” for graduate growth

## Graduate - YoY Enrollment Change by Format



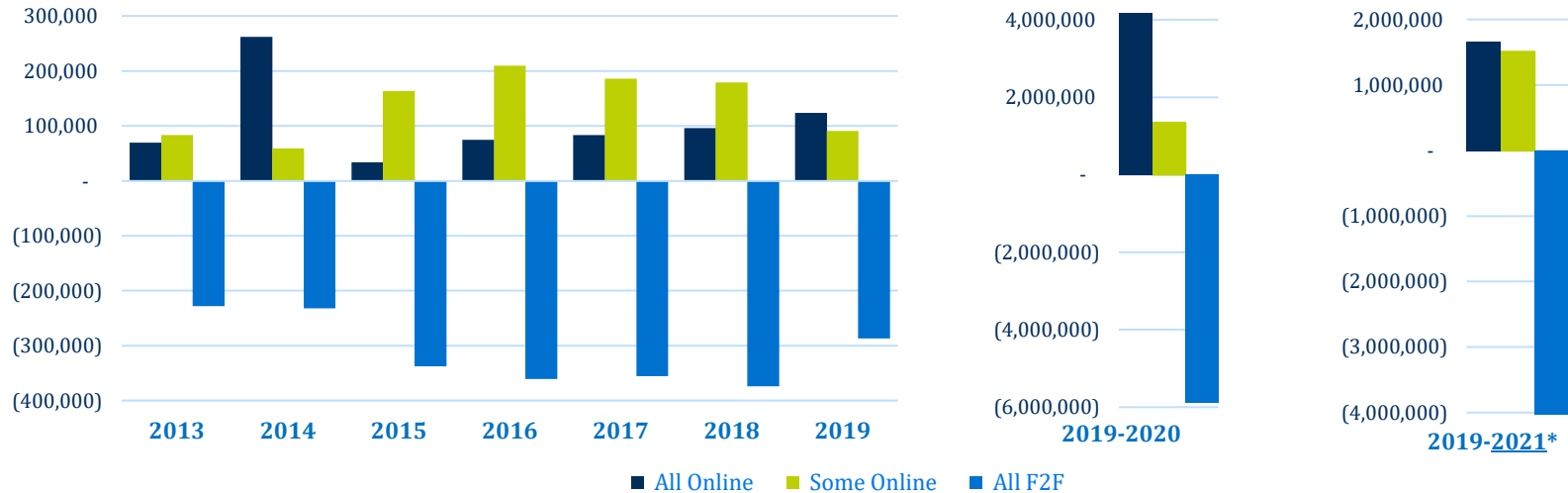
Source: RNL analysis of IPEDS Fall Enrollment data.

\*We compare 2019 to 2021 rather than 2020 in order to better understand the pre- and post-pandemic trajectory of online demand.



# ...but are you surprised that the same is true for undergraduate?

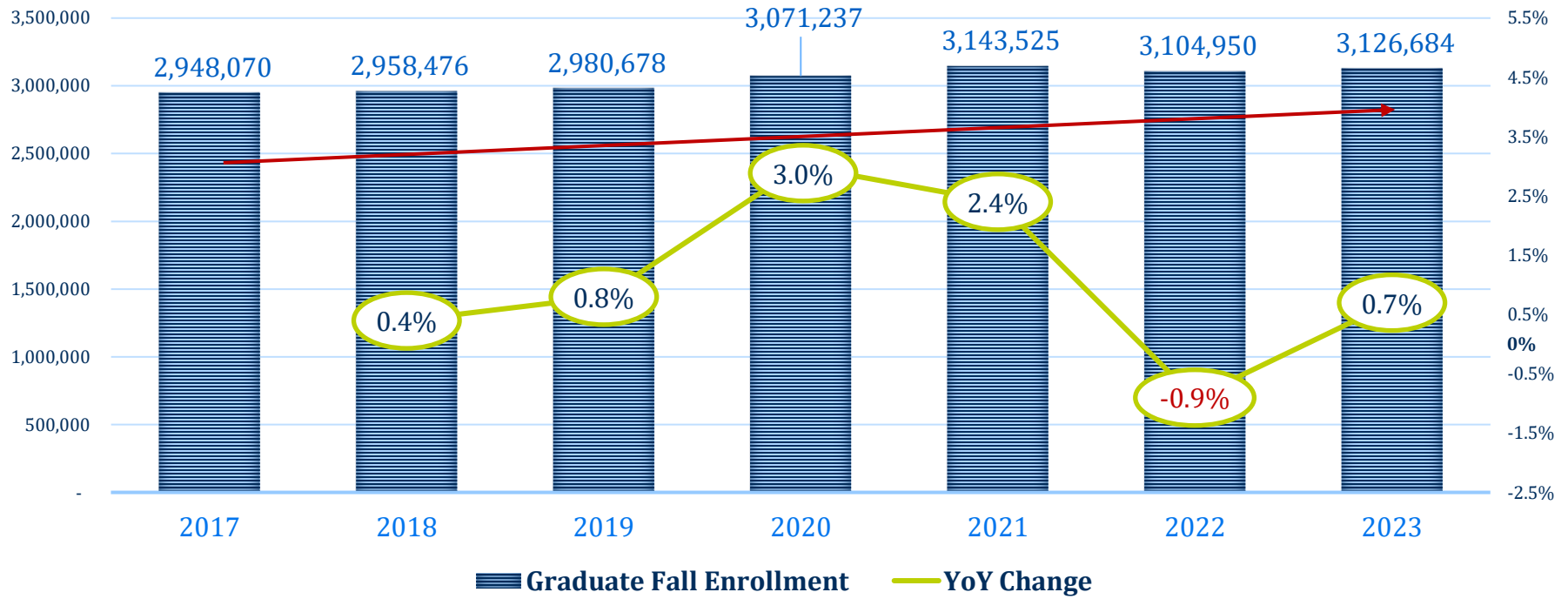
## Undergraduate - YoY Enrollment Change by Format



Source: RNL analysis of IPEDS Fall Enrollment data.

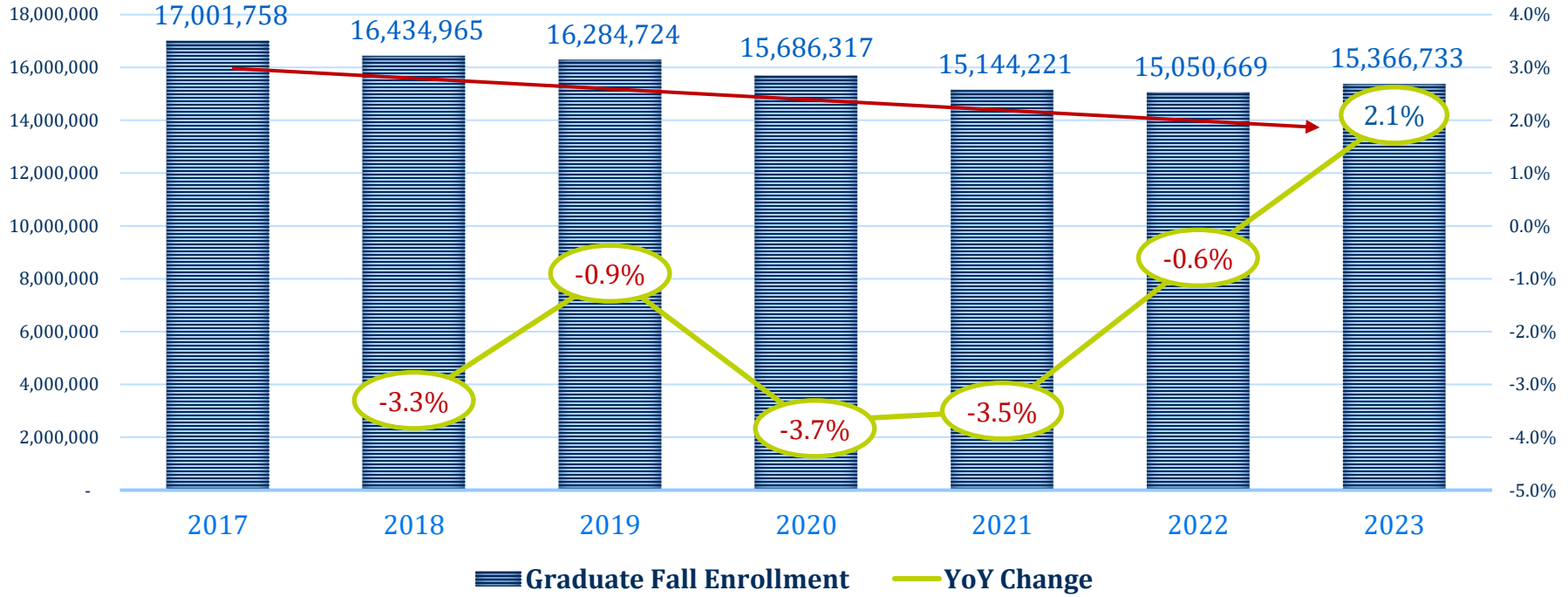
\*We compare 2019 to 2021 rather than 2020 in order to better understand the pre- and post-pandemic trajectory of online demand.

# Graduate Fall Enrollment Growth



\*Source: National Student Clearinghouse, [CTEE, Fall 2022](#)

# Undergraduate Fall Enrollment Growth

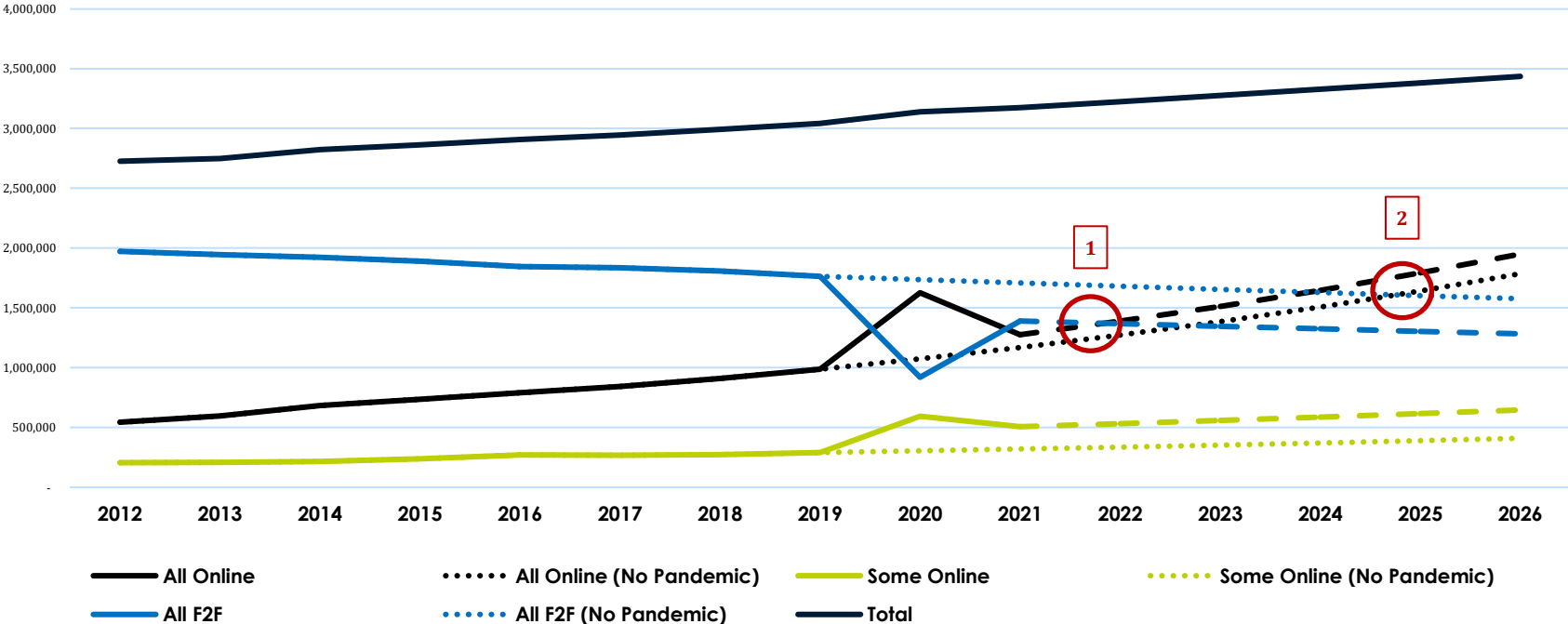


\*Source: National Student Clearinghouse, [CTEE, Fall 2022](#)

# Graduate Enrollment Trends and Format Choice

(With and Without the Pandemic)

Fall Enrollment: Graduate

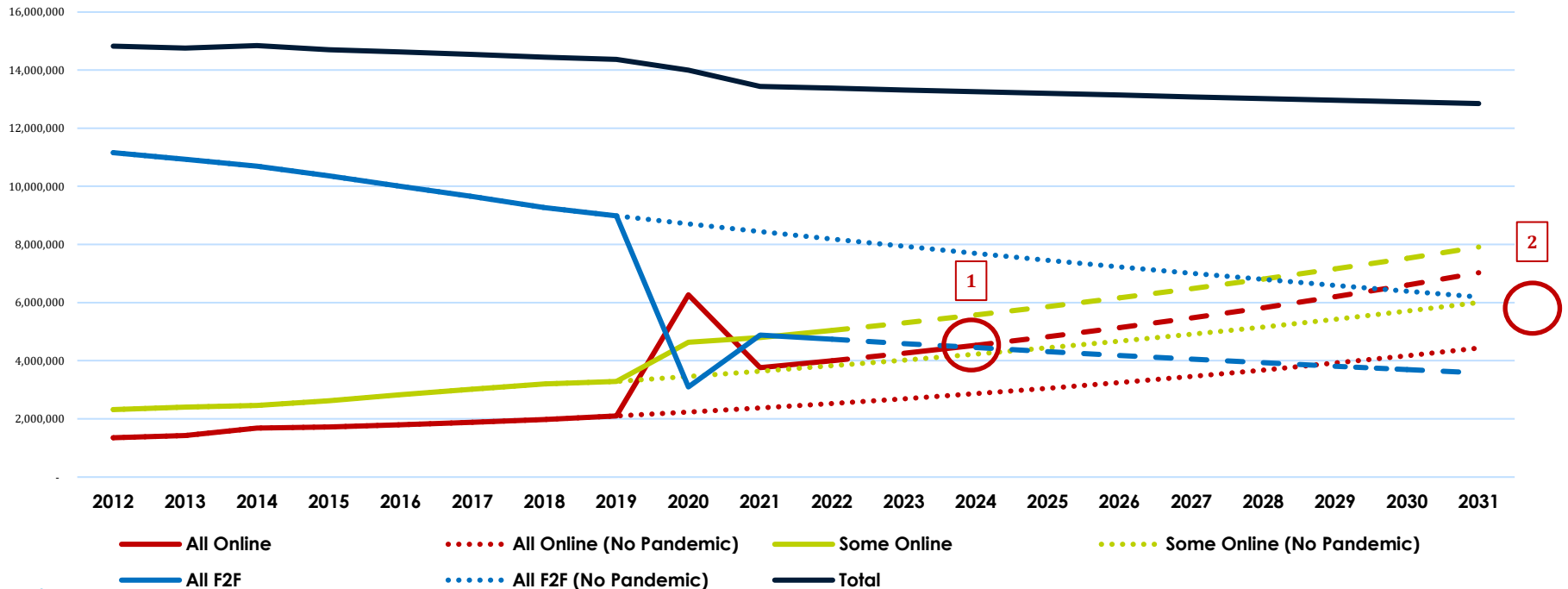


Source: RNL Analysis of IPEDS Fall Enrollment Snapshot data. (U.S. degree-granting institutions of at least two years.)

# 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.)

# The Undercounting of Online Students

| Undergraduate              |                                      |                                 |                  |              |
|----------------------------|--------------------------------------|---------------------------------|------------------|--------------|
|                            | Fall Enrollment Snapshot (Fall 2021) | 12-Month Enrollment (2021-2022) | Undercount       | % of total   |
| <b>Total Enrollment</b>    | <b>15,825,026</b>                    | <b>20,881,097</b>               | <b>5,056,071</b> | <b>24.2%</b> |
| <b>All Online Courses</b>  | 4,365,930                            | 6,282,243                       | 1,916,313        | 30.5%        |
| <b>Some Online Courses</b> | 5,056,813                            | 7,977,708                       | 2,920,895        | 36.6%        |
| <b>No Online Courses</b>   | 6,402,283                            | 6,621,146                       | 218,863          | 3.3%         |
| Graduate                   |                                      |                                 |                  |              |
|                            | Fall Enrollment Snapshot (Fall 2021) | 12-Month Enrollment (2021-2022) | Undercount       | % of total   |
| <b>Total Enrollment</b>    | <b>3,211,586</b>                     | <b>4,024,245</b>                | <b>812,659</b>   | <b>20.2%</b> |
| <b>All Online Courses</b>  | 1,294,448                            | 1,747,014                       | 452,566          | 25.9%        |
| <b>Some Online Courses</b> | 515,500                              | 952,737                         | 437,237          | 45.9%        |
| <b>No Online Courses</b>   | 1,401,638                            | 1,324,494                       | (77,144)         | -5.8%        |

Who are these students?

Online and hybrid students who enroll at times other than the fall semester.



Source: RNL Analysis of IPEDS 12-Month Unduplicated and Fall Enrollment Snapshot data. (U.S. degree granting institutions of at least two years.)



**Has your institution increased goals  
for graduate and online in recent  
years?**

**If so, have you been given more  
resources to do so?**

A blue-tinted photograph of a group of people, including a man with a beard, looking at a laptop screen together. The image is overlaid with a semi-transparent blue filter. The text 'The Region' is written in white on the left side of the image.

# The Region





# State and Regional Enrollment Trends: Graduate

Figure 5.2 Graduate Enrollment Changes by State, Fall 2023

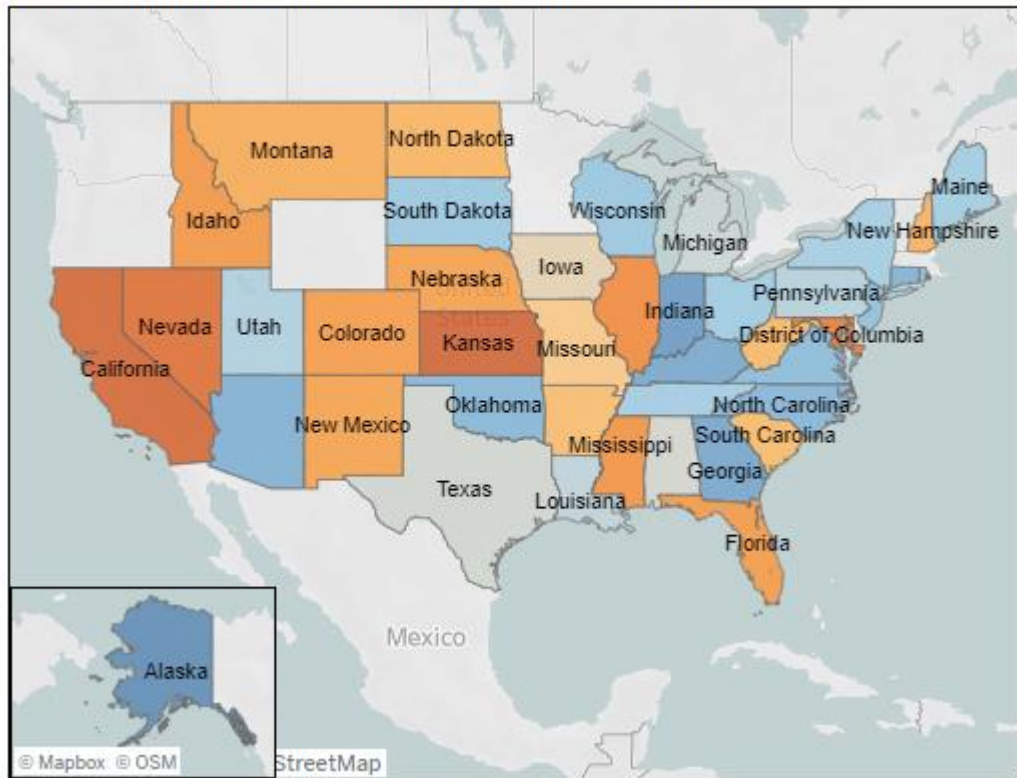
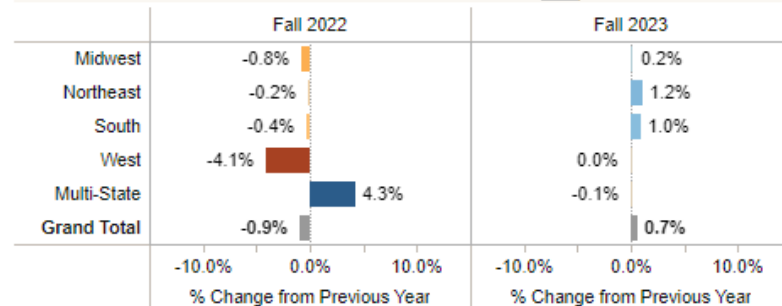


Figure 5.4 Graduate Enrollment Changes by Region





What online bachelor's program is generating the most graduates in this state?

# 25 Largest Online Bachelor's (CA)

| PROGRAM   | ONLINE AVAILABLE     |                 |                 | ALL FORMATS        |                 |                 | OCCUPATIONS               |                                  |
|---|----------------------|-----------------|-----------------|--------------------|-----------------|-----------------|---------------------------|----------------------------------|
|   | TOTAL ONLINE DEGREES | 5-YEAR GROWTH # | 5-YEAR GROWTH % | TOTAL DEGREES 2022 | 5-YEAR GROWTH # | 5-YEAR GROWTH % | ESTIMATED ANNUAL OPENINGS | PROJECTED % GROWTH (2023 – 2028) |
| Business Administration and Management          | 9,236                | 1,974           | 27%             | 26,483             | 47              | 0%              | 123,025                   | 6%                               |
| Registered Nursing                              | 2,046                | (380)           | (16%)           | 9,385              | 2,153           | 30%             | 15,678                    | 11%                              |
| Criminal Justice/Safety Studies                 | 1,865                | 1,055           | 130%            | 4,625              | 908             | 24%             | 5,562                     | 7%                               |
| Sociology                                       | 1,359                | 644             | 90%             | 8,176              | 582             | 8%              | 3,262                     | 7%                               |
| Psychology                                      | 1,296                | 53              | 4%              | 15,291             | 1,751           | 13%             | 5,554                     | 13%                              |
| Early Childhood Education                       | 990                  | (177)           | (15%)           | 4,131              | 461             | 13%             | 4,174                     | 5%                               |
| Business Administration, Management and Ops.    | 877                  | (590)           | (40%)           | 882                | (598)           | (40%)           | 102,691                   | 6%                               |
| Organizational Leadership                       | 692                  | (244)           | (26%)           | 697                | (258)           | (27%)           | 27,667                    | 7%                               |
| Health Care Administration                      | 685                  | 4               | 1%              | 1,020              | (247)           | (19%)           | 14,213                    | 7%                               |
| Liberal Studies                                 | 507                  | (65)            | (11%)           | 4,948              | 170             | 4%              | 133,434                   | 5%                               |
| Business/Commerce                               | 462                  | 274             | 146%            | 491                | 39              | 9%              | 54,126                    | 7%                               |
| Criminal Justice/Law Enforcement Administration | 417                  | (88)            | (17%)           | 486                | (523)           | (52%)           | 6,257                     | 8%                               |
| Multi-/Interdisciplinary Studies                | 413                  | 370             | 860%            | 1,018              | (63)            | (6%)            | 113,963                   | 4%                               |
| Human Resources Management                      | 335                  | (13)            | (4%)            | 341                | (109)           | (24%)           | 11,072                    | 7%                               |
| Human Development and Family Studies            | 306                  | (110)           | (26%)           | 1,218              | (366)           | (23%)           | 11,540                    | 10%                              |
| Child Development                               | 278                  | 6               | 2%              | 518                | 108             | 26%             | 21,920                    | 4%                               |
| Economics                                       | 254                  | 254             | Insf. Data      | 1,782              | (3,279)         | (65%)           | 13,833                    | 7%                               |
| Computer and Information Sciences               | 254                  | 196             | 338%            | 397                | 266             | 203%            | 32,284                    | 11%                              |
| Education                                       | 252                  | (6)             | (2%)            | 676                | 32              | 5%              | 25,712                    | 6%                               |
| Social Work                                     | 237                  | 179             | 309%            | 1,421              | 65              | 5%              | 7,579                     | 11%                              |
| Accounting                                      | 235                  | (90)            | (28%)           | 1,112              | (489)           | (31%)           | 27,481                    | 5%                               |
| Business, Management, Marketing, and Related    | 235                  | 51              | 28%             | 235                | (4)             | (2%)            | 88,321                    | 5%                               |
| Public Health                                   | 232                  | 215             | 1265%           | 2,090              | 1,199           | 135%            | 6,450                     | 16%                              |
| Computer Science                                | 224                  | 72              | 47%             | 8,674              | 3,223           | 59%             | 29,221                    | 12%                              |
| Behavioral Sciences                             | 176                  | (317)           | (64%)           | 342                | (547)           | (62%)           | 19,091                    | 9%                               |



# Top Online Bachelor's Competitive Insights

# Completive Insights: Online Business Administration

## How many degrees?

|                               | Completions (2022) | % Completions |
|-------------------------------|--------------------|---------------|
| All Programs                  | 26,483             | 100%          |
| Distance Offered Programs     | 9,236              | 35%           |
| Non-Distance Offered Programs | 17,247             | 65%           |

## How many competing programs?

|                               | Institutions (2022) | % Institutions |
|-------------------------------|---------------------|----------------|
| All Programs                  | 89                  | 100%           |
| Distance Offered Programs     | 36                  | 40%            |
| Non-Distance Offered Programs | 53                  | 60%            |

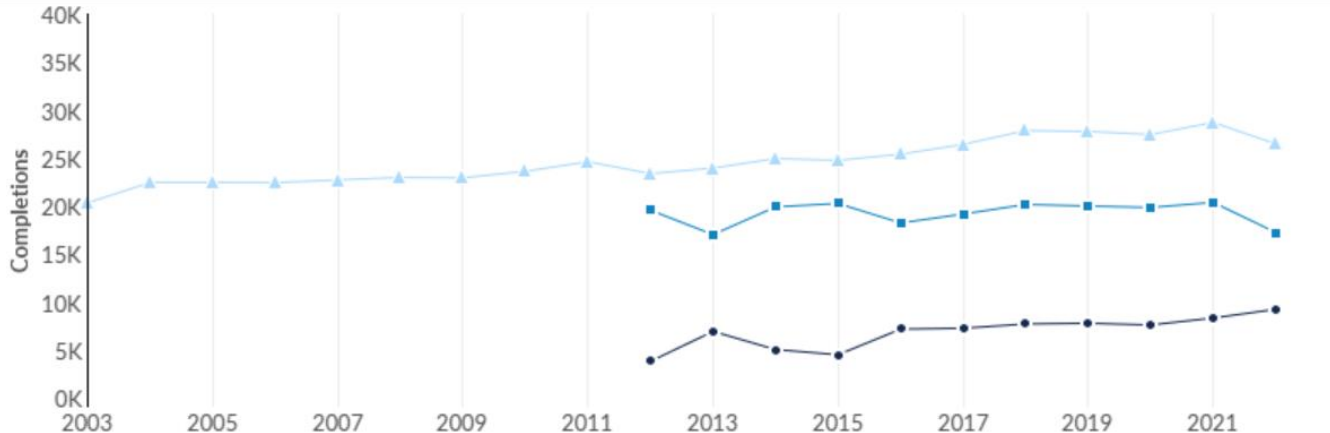
## Largest Online Programs:

| Institution                                  | Bachelor's Degree > Distance Offered Completions (2022) | Growth % YOY (2022) | Market Share (2022) | IPEDS Cost Per Credit (2022) | Completions Trend (2018-2022) |
|--|---|---------------------|---------------------|------------------------------|-------------------------------|
| ⊕ California State University-Fullerton      | 2,233   | -8.9%               | 24.2%               | N/A                          |                               |
| ⊕ San Diego State University                 | 1,875   | 5.9%                | 20.3%               | N/A                          |                               |
| ⊕ California State University-East Bay       | 800   | -7.6%               | 8.7%                | N/A                          |                               |
| ⊕ Ashford University                         | 725   | 6.1%                | 7.8%                | N/A                          |                               |
| ⊕ California State University-San Bernardino | 686   | Insf. Data          | 7.4%                | N/A                          |                               |
| ⊕ California State University-Chico          | 585   | Insf. Data          | 6.3%                | N/A                          |                               |
| ⊕ University of Massachusetts Global         | 299   | 12.4%               | 3.2%                | \$500                        |                               |
| ⊕ University of the People                   | 235   | 9.8%                | 2.5%                | N/A                          |                               |
| ⊕ University of La Verne                     | 219   | -26.0%              | 2.4%                | \$1,330                      |                               |
| ⊕ Pepperdine University                      | 218   | 23.9%               | 2.4%                | \$1,955                      |                               |



# Completive Insights: Online Business Administration

Degree Production Trends - 2003-2022



What is the enrollment trend across all programs?



Which types of programs are pushing growth? Online? Classroom? Both?



|                                 | 2012 Completions | 2022 Completions | % Change |
|---------------------------------|------------------|------------------|----------|
| ● Distance Offered Programs     | 3,814            | 9,236            | +142.2%  |
| ■ Non-Distance Offered Programs | 19,570           | 17,247           | -11.9%   |
| ▲ All Programs                  | 23,384           | 26,483           | +13.3%   |





What master's (**all formats**) has seen the greatest growth in the last five years in this state?



# 25 Largest Growth Master's (CA)

ALL FORMATS

ONLINE AVAILABLE

OCCUPATIONS

| PROGRAM   | TOTAL DEGREES 2022 | 5-YEAR GROWTH # | 5-YEAR GROWTH % | TOTAL ONLINE DEGREES | 5-YEAR GROWTH # | 5-YEAR GROWTH % | ESTIMATED ANNUAL MASTER'S OPENINGS | PROJECTED % GROWTH (2023 – 2028) |
|---|--------------------|-----------------|-----------------|----------------------|-----------------|-----------------|------------------------------------|----------------------------------|
| <b>Management Science</b>                       | 3,436              | 3,236           | 1618%           | 428                  | 347             | 428%            | 7,663                              | 9%                               |
| Applied Behavior Analysis                       | 1,097              | 997             | 997%            | 1,023                | 953             | 1361%           | 685                                | 9%                               |
| <b>Management Sciences/Quantitative Methods</b> | 793                | 684             | 628%            | 3                    | 3               | Insf. Data      | 4,195                              | 8%                               |
| Counselor Education/School Counseling           | 1,870              | 645             | 53%             | 564                  | 432             | 327%            | 913                                | 7%                               |
| Family Practice Nursing                         | 997                | 630             | 172%            | 734                  | 622             | 555%            | 584                                | 28%                              |
| Teacher Educ./Prof. Dev., Specific Levels       | 870                | 580             | 200%            | 580                  | 387             | 201%            | 26,291                             | 5%                               |
| Econometrics and Quantitative Economics         | 519                | 480             | 1231%           | 0                    | 0               | 0%              | 3,800                              | 5%                               |
| Special Education and Teaching                  | 1,234              | 477             | 63%             | 768                  | 485             | 171%            | 906                                | 7%                               |
| Human Resources Management                      | 746                | 447             | 149%            | 702                  | 447             | 175%            | 6,151                              | 7%                               |
| Public Health                                   | 1,460              | 442             | 43%             | 687                  | (63)            | (8%)            | 3,583                              | 16%                              |
| Programs for Foreign Lawyers                    | 919                | 438             | 91%             | 465                  | 374             | 411%            | 1,690                              | 8%                               |
| Secondary Education and Teaching                | 627                | 379             | 153%            | 388                  | 367             | 1748%           | 1,994                              | 7%                               |
| Clinical Psychology                             | 1,112              | 354             | 47%             | 545                  | 545             | Insf. Data      | 3,973                              | 5%                               |
| Nursing Administration                          | 419                | 327             | 355%            | 332                  | 303             | 1045%           | 8,710                              | 11%                              |
| Physician Assistant                             | 619                | 325             | 111%            | 0                    | 0               | 0%              | 377                                | 18%                              |
| School Psychology                               | 617                | 308             | 100%            | 216                  | 147             | 213%            | 199                                | 4%                               |
| Educational/Instructional Technology            | 490                | 292             | 147%            | 434                  | 236             | 119%            | 1,084                              | 8%                               |
| Financial Mathematics                           | 500                | 268             | 116%            | 0                    | 0               | 0%              | 2,291                              | 10%                              |
| Business Statistics                             | 315                | 264             | 518%            | 86                   | 86              | Insf. Data      | 361                                | 16%                              |
| Library and Information Science                 | 766                | 223             | 41%             | 766                  | 223             | 41%             | 9,747                              | 6%                               |
| Counseling Psychology                           | 1,466              | 220             | 18%             | 635                  | 292             | 85%             | 1,229                              | 9%                               |
| Architectural and Building Sciences/Tech        | 410                | 212             | 107%            | 0                    | 0               | 0%              | 6,908                              | 6%                               |
| Information Science/Studies                     | 421                | 200             | 90%             | 419                  | 390             | 1345%           | 11,932                             | 13%                              |
| Project Management                              | 236                | 186             | 372%            | 236                  | 215             | 1024%           | 10,978                             | 7%                               |
| Speech-Language Pathology/Pathologist           | 388                | 184             | 90%             | 0                    | 0               | 0%              | 451                                | 16%                              |





# Top Growth Master's Competitive Insights

# Completive Insights: Management Science

## How many degrees?

|                               | Completions (2022) | % Completions |
|-------------------------------|--------------------|---------------|
| All Programs                  | 3,436              | 100%          |
| Distance Offered Programs     | 428                | 12%           |
| Non-Distance Offered Programs | 3,008              | 88%           |

## How many competing programs?

|                               | Institutions (2022) | % Institutions |
|-------------------------------|---------------------|----------------|
| All Programs                  | 23                  | 100%           |
| Distance Offered Programs     | 6                   | 26%            |
| Non-Distance Offered Programs | 17                  | 74%            |

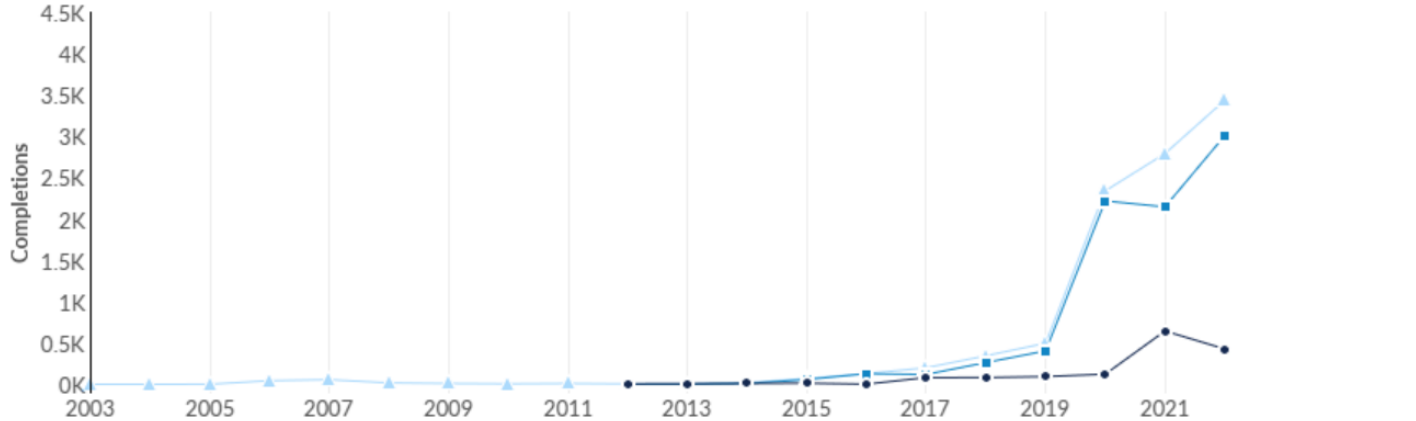
## Largest Programs:

| Institution                            | Master's Degree Completions (2022) | Growth % YOY (2022) | Market Share (2022) | IPEDS Cost Per Credit (2022) | Completions Trend (2018-2022) |
|--|------------------------------------|---------------------|---------------------|------------------------------|-------------------------------|
| ☐ University of California-Los Angeles | 790                                | 8.2%                | 23.0%               | N/A                          |                               |
| ☐ University of California-Berkeley    | 673                                | 13.1%               | 19.6%               | N/A                          |                               |
| ☐ Stanford University                  | 583                                | 45.8%               | 17.0%               | \$1,255                      |                               |
| ☐ University of Southern California    | 411                                | 7.6%                | 12.0%               | \$2,137                      |                               |
| ☐ University of California-Davis       | 259                                | 115.8%              | 7.5%                | N/A                          |                               |
| ☐ University of California-Irvine      | 143                                | 83.3%               | 4.2%                | N/A                          |                               |
| ☐ San Jose State University            | 95                                 | 143.6%              | 2.8%                | N/A                          |                               |
| ☐ Santa Clara University               | 86                                 | 22.9%               | 2.5%                | \$1,234                      |                               |
| ☐ University of California-San Diego   | 84                                 | 16.7%               | 2.4%                | N/A                          |                               |
| ☐ California State University-East Bay | 79                                 | -30.1%              | 2.3%                | N/A                          |                               |



# Completive Insights: Management Science

## Degree Production Trends – 2003-2022



What is the enrollment trend across all programs?



|                                 | 2012 Completions | 2022 Completions | % Change    |
|---------------------------------|------------------|------------------|-------------|
| ● Distance Offered Programs     | 5                | 428              | +8,460.0%   |
| ■ Non-Distance Offered Programs | 0                | 3,008            | +Insf. Data |
| ▲ All Programs                  | 5                | 3,436            | +68,620.0%  |

Which types of programs are pushing growth? Online? Classroom? Both?

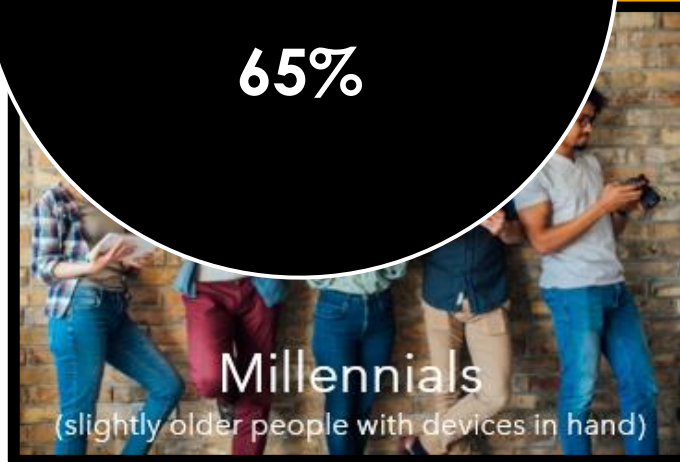
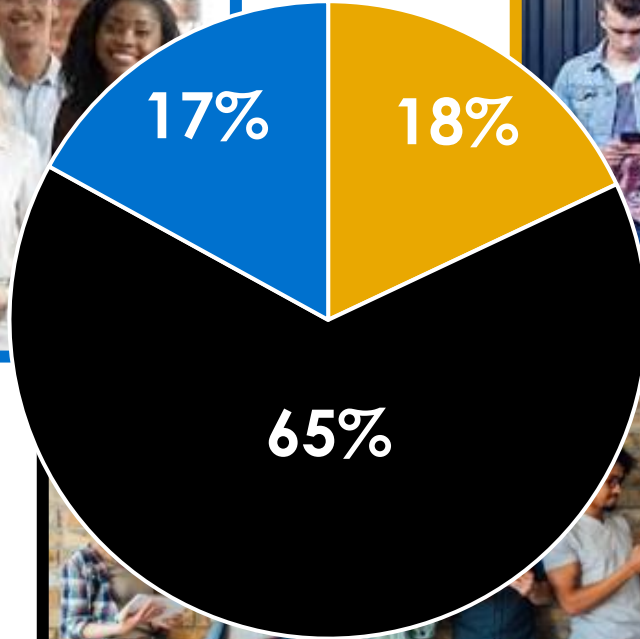


A blue-tinted photograph of three people in a meeting. A woman on the left is pointing at a laptop screen. A man in a plaid shirt is looking at the screen. A woman with glasses is also looking at the screen. There are papers and a laptop on the table.

*When we come back from  
our break, we're going to  
dive into what it will take to  
meet student expectations –*

*here's why...*

# Business Graduate Students by Generation



# Student Expectations have shifted. Are you ready?

Past student expectations



"Me" centric view of the world

Rise in consumer mentalities

Need for speed

Meaningful connections

# RNL's Graduate and Online Reports

**RNL** 2021 Graduate Student Recruitment Report  
Insights for graduate enrollment and marketing leaders

Co-sponsored by:  
**PLEXUSS**



The cover features the RNL logo in the top left, the title and subtitle in the top right, the PLEXUSS logo in the middle left, and a large QR code in the bottom center. The background is a photograph of a woman with glasses smiling while looking at a laptop.

**RNL** 2022 Online Student Recruitment Report  
10 Challenges and Solutions for Engaging Prospective Online Students

Co-sponsored by:  
**PLEXUSS**



The cover features the RNL logo in the top left, the title and subtitle in the top right, the PLEXUSS logo in the middle left, and a large QR code in the bottom center. The background is a photograph of a woman with glasses looking at a laptop.

**RNL** 2023 Graduate Student Recruitment Report  
25 key insights for enrollment leaders based on a survey of 1,500 prospective graduate students

Co-sponsored by:  
**PLEXUSS**

Access Full Report



The cover features the RNL logo in the top left, the title and subtitle in the top right, the PLEXUSS logo in the middle left, and a large QR code in the bottom center. The background is a photograph of a woman with blonde hair looking at a laptop.



# **RNL Regional Workshop**

Graduate and Online Enrollment



# 2

## Understanding Your Audience

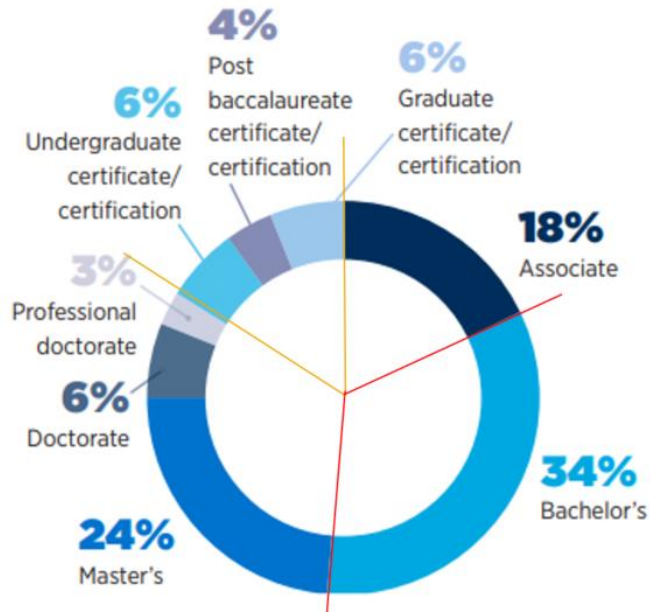
*12 Things You Need to Do  
in Order to Win*



What are the “must do”  
elements in program design?

# 1. Focus on degrees

TABLE 7: INTENDED ONLINE CREDENTIAL



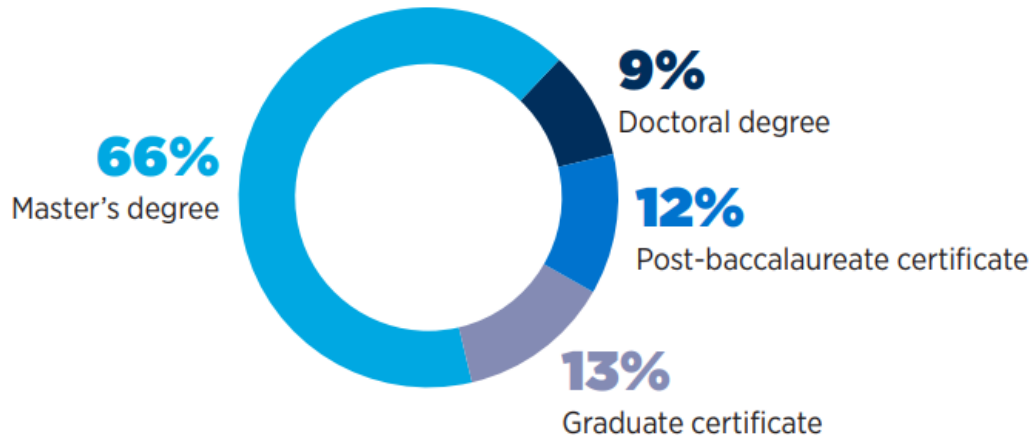
## How to Win



Ensure that you have adequate numbers of online master's **AND bachelor's** programs, rather than launching any program for which there is internal interest



# 1. Focus on degrees



## How to Win



Ensure that you have adequate master's level offerings. Don't spend undue time on certificates which demonstrate lower demand and produce less revenue – unless they can be stacked into a degree.

## 2. Focus on high demand degree areas.

# 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.

| 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%  |

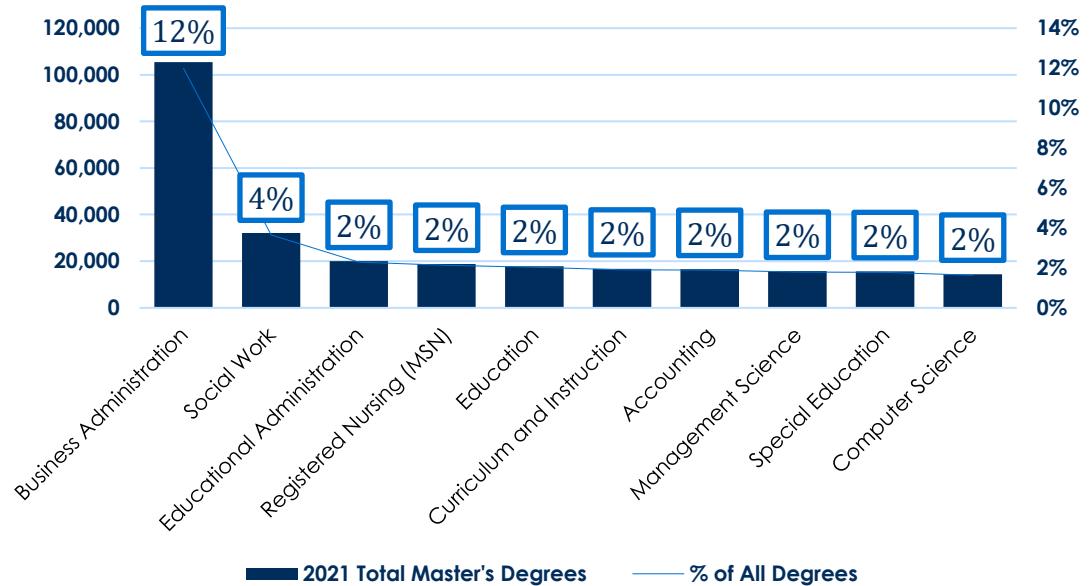
# 2a. You can't "niche" yourself into enrollment health.

## How to Win



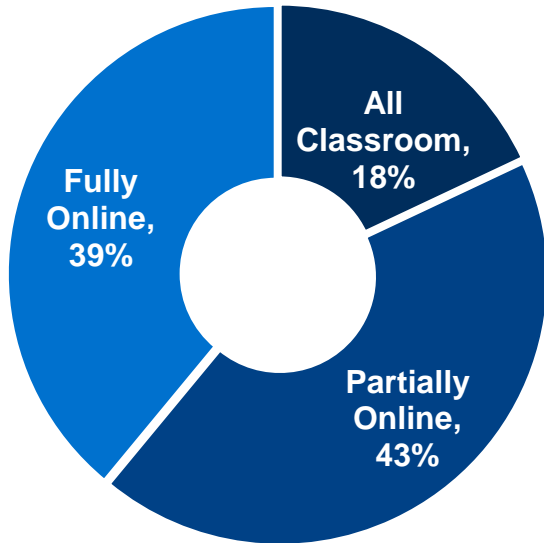
You cannot "niche" yourself into enrollment growth.

2021 Master's Degree Production: 10 Largest Programs



Among **1,101** different master's categories, the 10 largest account for 32% of the total in 2021. 173 degree areas produced fewer than 10 graduates.

### 3. Ensure you offer online programs – in high demand topics.



#### Distance of Furthest Programs Considered

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

## How to Win



Almost any program designed to materially contribute to enrollment growth must be available online. Recognize that online delivery is how institutions provide flexibility and convenience today.





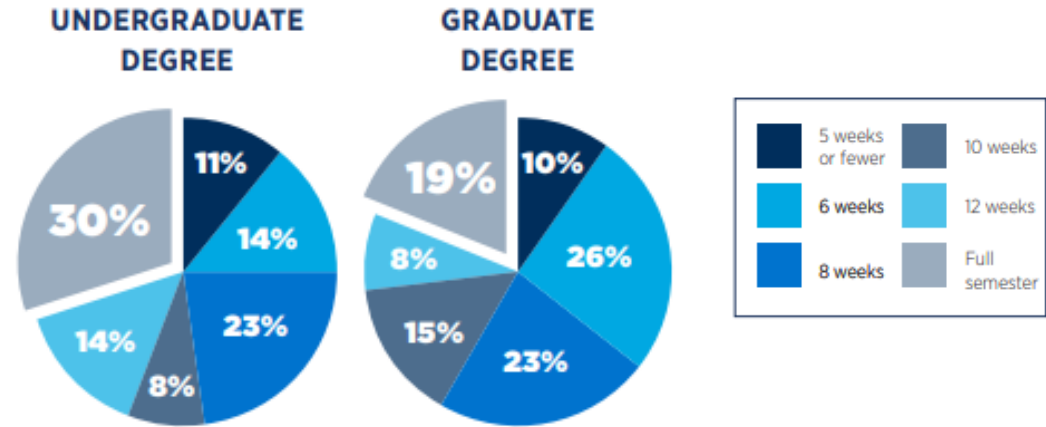
# 4. Ensure that programs offer accelerated courses.

## How to Win



Less than 30% of undergrads and 20% of grad students seek semester-length study. Growth programs must offer accelerated terms – and stackable courses.

**TABLE 11: PREFERRED LENGTH OF COURSES**



**TABLE 12: PREFERRED NUMBER OF COURSES PER SEMESTER/TERM**

|           | UNDER-GRADUATE DEGREE | GRADUATE DEGREE |
|-----------|-----------------------|-----------------|
| 1         | 17%                   | 21%             |
| 2         | 44%                   | 41%             |
| 3         | 21%                   | 23%             |
| 4 or more | 17%                   | 15%             |

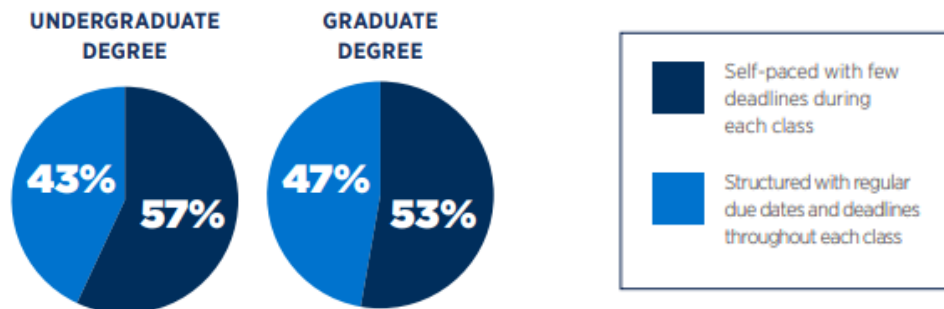
# 4a. In online programs, some self-paced and more structured elements should be included, with optional convenings.

## How to Win

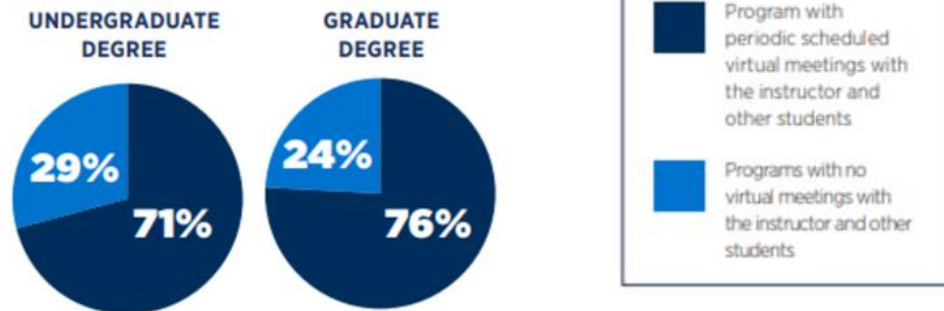


Online students want both self-paced and structured elements in their courses, and express interest in (not more than 2) synchronous convenings per course (which should be optional).

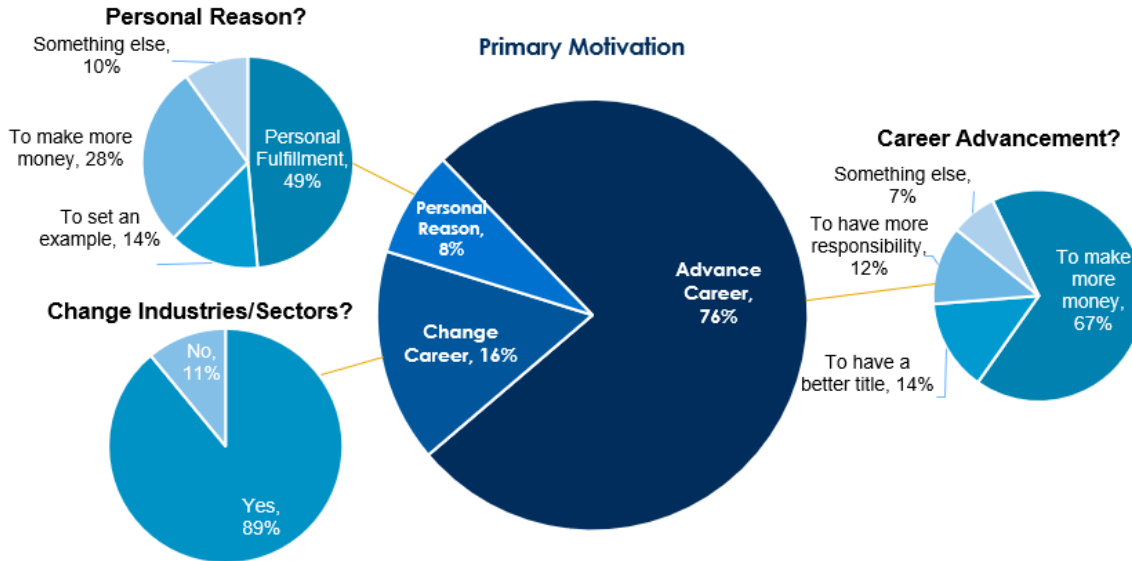
**TABLE 13: PREFERENCE: SELF-PACED OR STRUCTURED**



**TABLE 14: ENGAGEMENT**



# 5. Ensure that career advancement is at the core of your positioning – and curriculum.



## How to Win



All but 8% of students enroll for career reasons. Positioning and curriculum that does not make future career success (think ROI) clear will not win. Avoid imagery of grads in caps and gowns in favor of people in work situations.



# 6. Messaging, positioning, and programs should reflect concerns with cost, future employment, and flexibility.

## How to Win



Every aspect of programs should reflect student concern with total cost, future employment, and flexibility. This not only means positioning to these concerns, but developing programs that require as few credits as possible (less \$), accept previous credit, showcase the success of recent graduates, and offer flexibility in formats.

| IMPORTANCE OF FACTORS IN ENROLLMENT DECISIONS            | IMPORTANT<br>(IMPORTANT AND VERY IMPORTANT) |          |
|--|---|----------|
|  | NOT YET ENROLLED                            | ENROLLED |
| Cost   | 77%   | 72%      |
| Future employment opportunities                          | 70%   | 70%      |
| Flexible course options (online, evening, weekend, etc.) | 72%   | 63%      |
| Financial aid/scholarship opportunities                  | 69%   | 68%      |
| Academic reputation                                      | 66%   | 69%      |
| Campus location (close to work/home)                     | 54%   | 53%      |
| Personalized attention prior to enrollment               | 39%   | 41%      |
| Recommendations from family/friends/employer             | 33%   | 36%      |
| Size of institution                                      | 22%   | 28%      |

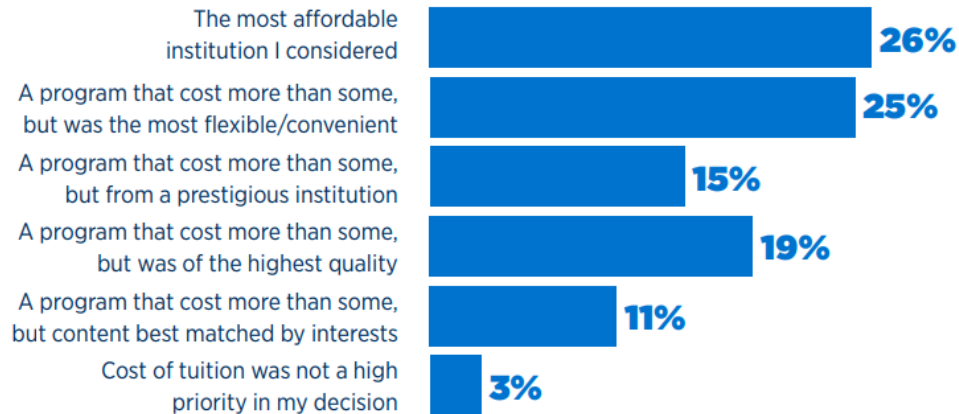
# 6a. If you are not the most affordable institution, focus even more messaging on other aspects of ROI.

## How to Win



Only 26% 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” factor unless you truly ARE the prestige provider in your region or program area.

### Balancing cost and other factors





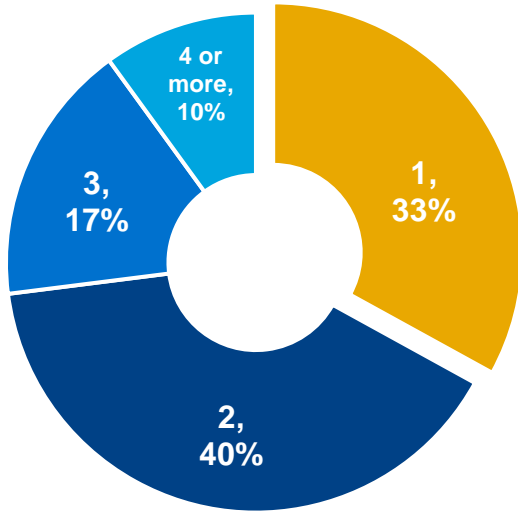
What are the “must do”  
processes in recruitment and  
cultivation?



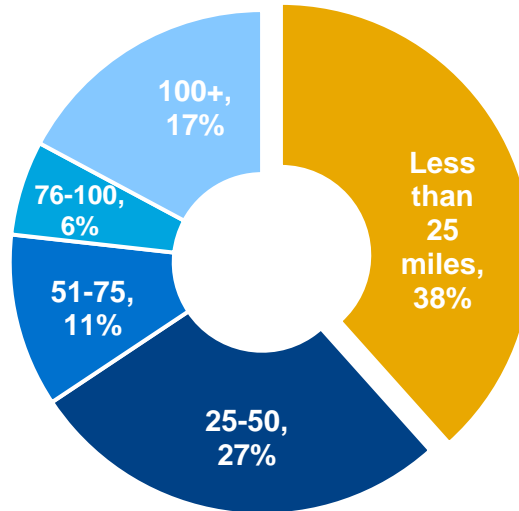
**What is your team doing (or does it want to do) to address evolving student expectations?**

# 7. Make the case for YOUR program in comparison with your competitors (which ARE local).

## How Many Programs



## How Far Away



## How to Win



Unlike past times, you are not the only program being considered, so focus on “selling” your program in relation to others. Also note that (even in online programs), you are competing locally more often than nationally – or even regionally.





# 8. Respond quickly – within minutes or hours – or risk losing the student and/or creating a bad “first impression.”

## How to Win



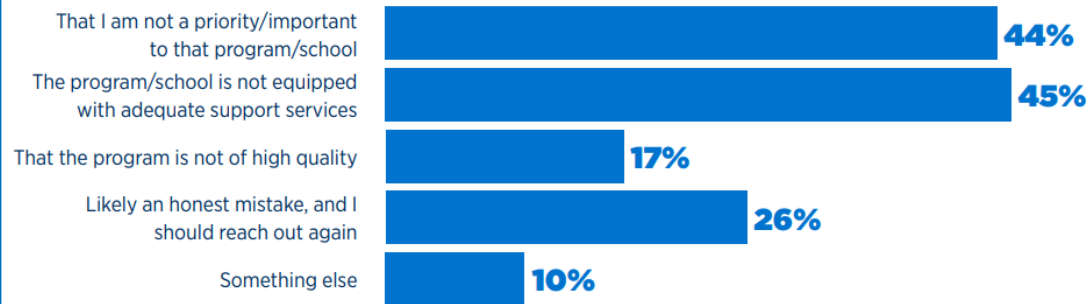
Students (young or old) expect response times like any other service they use. Responding within minutes (or hours) is essential in both satisfying the student AND ensuring they have a positive attitude about your program.

| TABLE 31: EXPECTED RESPONSE TIMES AFTER FIRST INQUIRY | UNDER-GRADUATE DEGREE | GRADUATE DEGREE |
|---|-----------------------|-----------------|
| <b>Personalized email</b>                             |                       |                 |
| Immediately   | 27%                   | 19%             |
| Within 3 hours  | 21%                   | 20%             |
| Within a day  | 29%                   | 26%             |
| More than 1 day                                       | 23%                   | 36%             |
| <b>Text message</b>                                   |                       |                 |
| Immediately   | 27%                   | 24%             |
| Within 3 hours  | 25%                   | 27%             |
| Within a day  | 25%                   | 23%             |
| More than 1 day                                       | 23%                   | 27%             |
| <b>Phone call</b>                                     |                       |                 |
| Immediately   | 29%                   | 24%             |
| Within 3 hours  | 19%                   | 20%             |
| Within a day  | 26%                   | 26%             |
| More than 1 day                                       | 26%                   | 31%             |

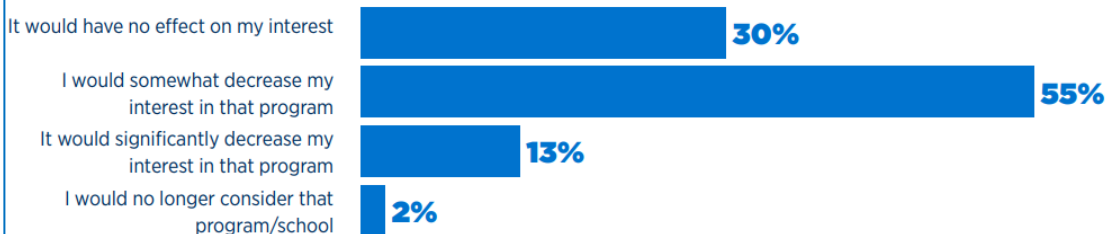
Source: 2022 Online Student Recruitment Report, RNL

# 8a. The best programs with the best marketing, are stunted by ineffective cultivation and follow up.

## What does a slow response signify to you?



## To what extent did/would a slow response affect your willingness to consider a particular program?



Source: 2023 Graduate Student Recruitment Report, RNL

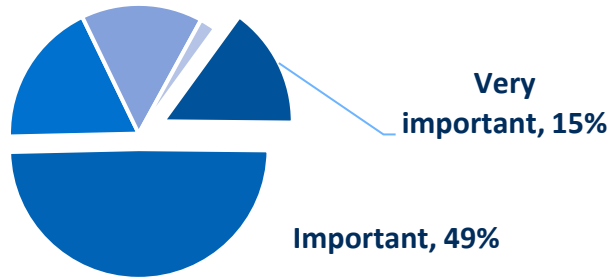
## How to Win



Response times that take longer than expectations result in diminished interest and negative impressions. Only one in three will “forgive” a slow response.

# 8a. Early personalized communication is essential

Importance of Personalized Communication



| PERSONALIZE THEIR RESPONSE?  | 1   | 2   | 3   | 4   | 5   | 6   |
|--|-----|-----|-----|-----|-----|-----|
| Use my first name in emails/texts  | 51% | 18% | 13% | 9%  | 6%  | 3%  |
| Send me information specific to my program of interest                         | 26% | 30% | 26% | 9%  | 6%  | 3%  |
| Appear to know me and my situation when I make contact                         | 10% | 16% | 20% | 16% | 28% | 9%  |
| Send me videos in which my name is used  | 6%  | 20% | 11% | 14% | 23% | 26% |
| Call me regularly to check in on my needs and questions                        | 4%  | 8%  | 13% | 16% | 17% | 43% |
| Share information reflecting/related to my demographic (age, background, etc.) | 3%  | 8%  | 17% | 35% | 20% | 16% |

## How to Win



While 90% percent of students will accept a non-personalized email as a place-holder, only 7% prefer ongoing non-personalized contact. Two-thirds indicate that personalized communication is an important aspect of their interest in programs, but the methods they expect are quite straightforward.

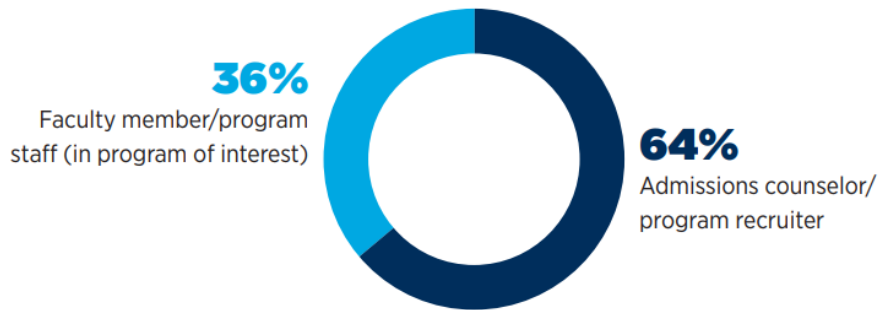
# 9. Ensure that professional recruiters are responding first, and in early follow up contact.

## How to Win

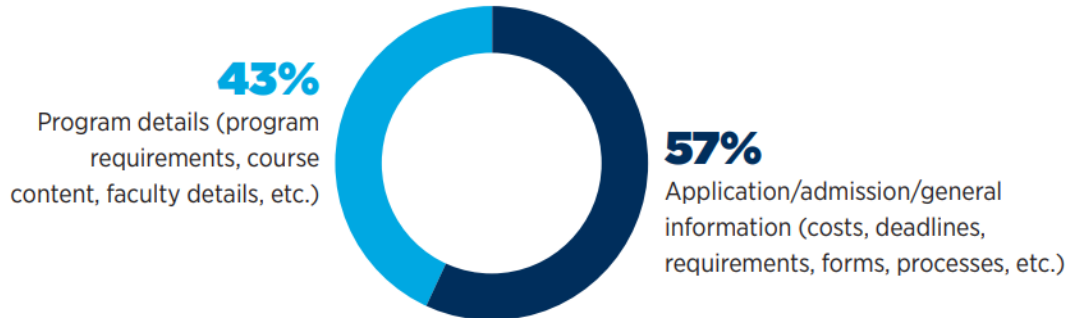


Many decentralized enrollment offices rely on faculty or other program staff to respond to inquiries. This is not only ineffective (in ensuring quick follow up) but also unnecessary, as students prefer a recruiter, and the information they need is general.

### Follow Up: Who



### Follow Up: What



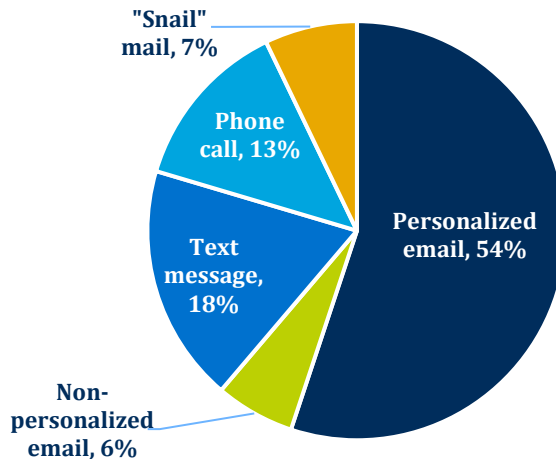
# 10. Create communications flows that engage prospects with relevant content in multiple channels.

## How to Win

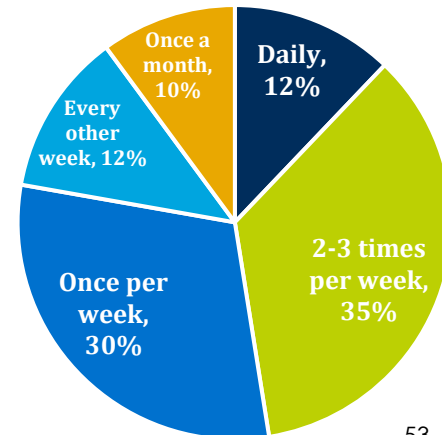


After first engagement, prospective students seek regular contact (once per week, after an initial period of more regular contact). Mix up your channels (add in text and leave phone messages) to ensure you catch them where they are at any given moment.

### Follow Up: How



### Follow Up: How Often



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

TABLE 38: EXPECTED TIME TO RECEIVE NOTIFICATION OF ADMISSION

|                     | UNDER-GRADUATE DEGREE | GRADUATE DEGREE |
|---------------------|-----------------------|-----------------|
| 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 | 2%                    | 3%              |



Source: 2022 Online Student Recruitment Report, RNL

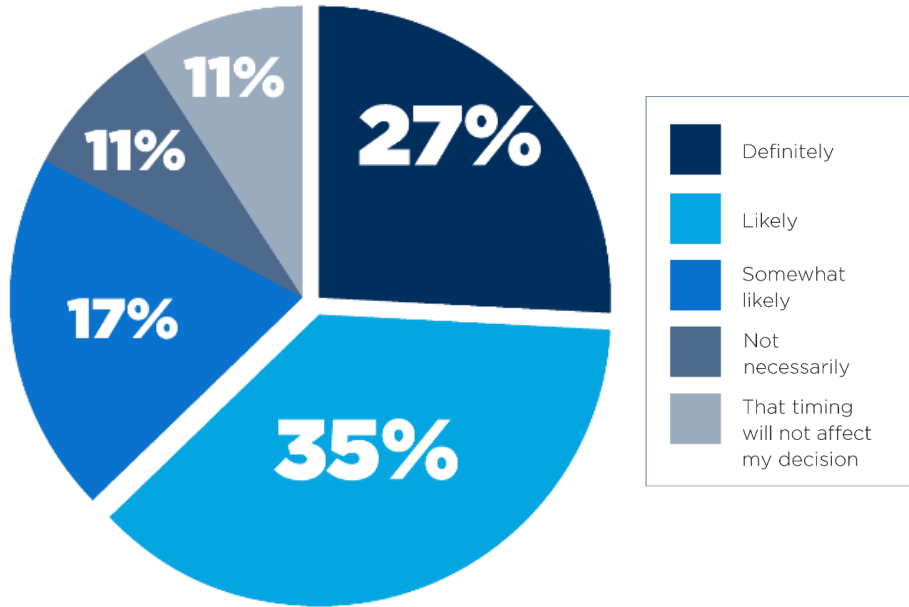
## How to Win



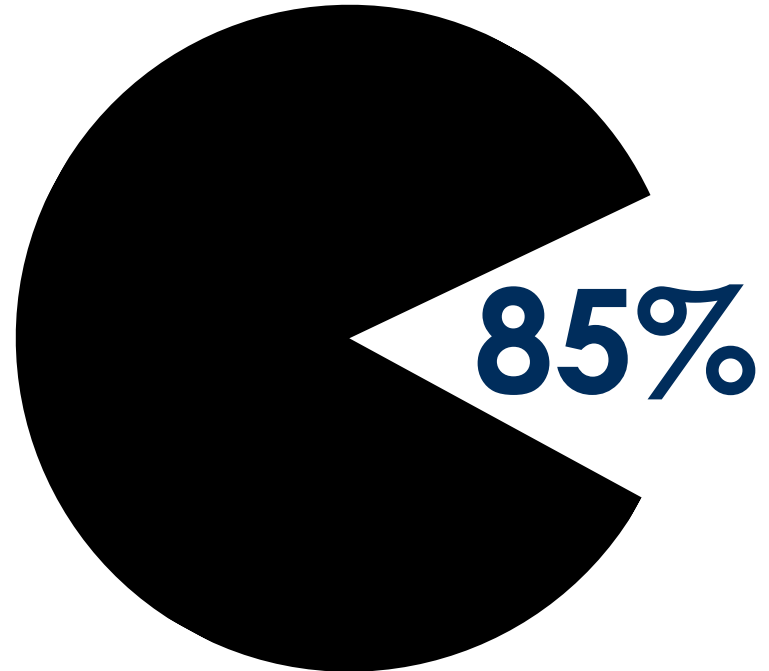
Admissions processes must be streamlined. Evaluate every element in your process (and materials required) to see if there is a regulatory or accreditation reason for its inclusion. If not, eliminate. Work with faculty to develop “minimum requirements” criteria that allows admissions office to accept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

# 12. Why is all of this SO important?

Likelihood of Enrolling:  
First Program to Respond



Likelihood of Enrolling:  
First Program to Admit



# We value you!

## RESOURCES

We are giving you exclusive access to our full research reports. Check out the reports at the registration table and at your seats.

## CONNECT WITH RNL

Let us know if you'd like to connect to discuss how we are partnering with campuses in any of the following areas:

- OPM alternative
- Conversion
- Lead generation
- Instructional design
- Full-funnel attribution
- Consulting and research

## EVALUATION FORM

Please complete evaluation form and leave at the table or hand to an RNL staff member.



OFFER TO RNL  
WORKSHOP PARTICIPANTS

## Access to RNL's latest report: the 2023 Graduate Student Recruitment Report



*scan me*



# **RNL Regional Workshop**

Graduate and Online Enrollment



# 3

## **Meet Your Market:** Best Practices in Lead Gen and Conversion





**How do you generate  
leads for your graduate  
and/or online  
programs?**

# 1. Marketing strategy should integrate multiple channels and tactics, and blend digital and traditional.

## How to Win

Integrated Marketing



Organic search, paid digital, traditional media, events, and working existing networks/partnerships for leads are all essential elements of success.



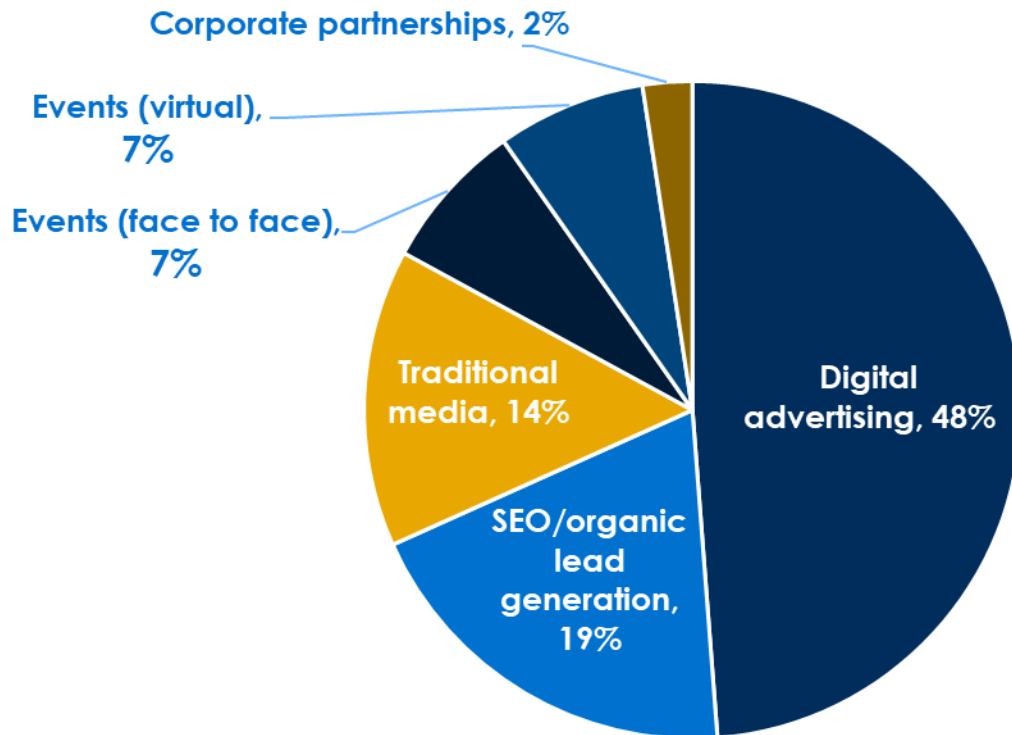
## 2. Marketing budget allocations should align with the channels that produce the largest numbers of leads.

### How to Win

Integrated Marketing



Allocate your resources to align with how students search.



# 3. Organic lead gen needs to be the foundation of your strategy.

## How to Win

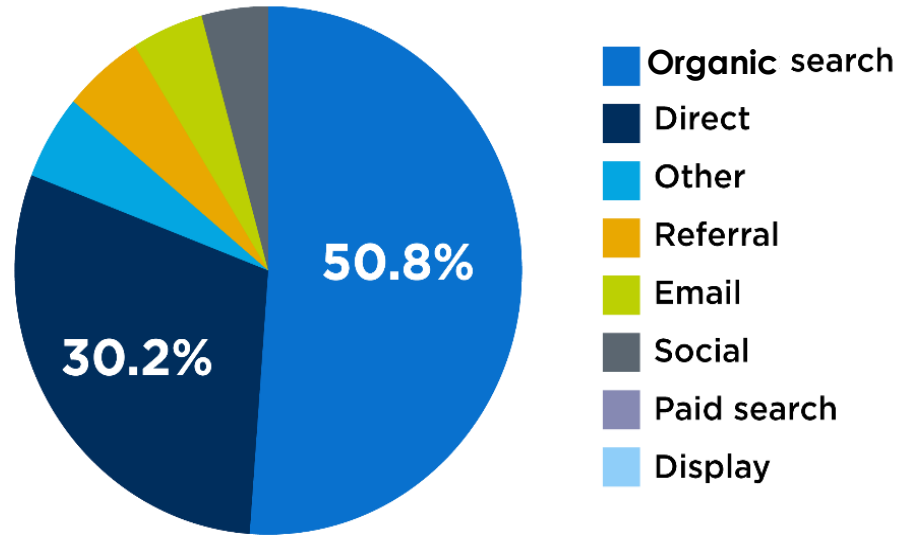
Search Engine Optimization



**Organic SEO** may not be your largest spend, but it is the foundation of success.

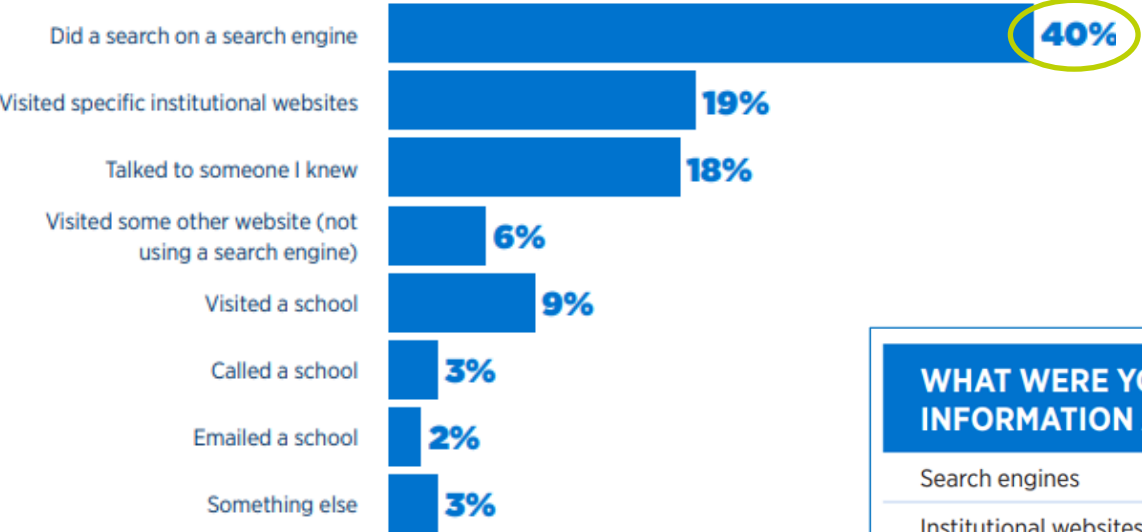
Organic leads convert at **7 times the rate** of other leads and 50% of all website traffic comes from organic search.

### TOP CHANNELS



# 90 percent of students start on a search engine.

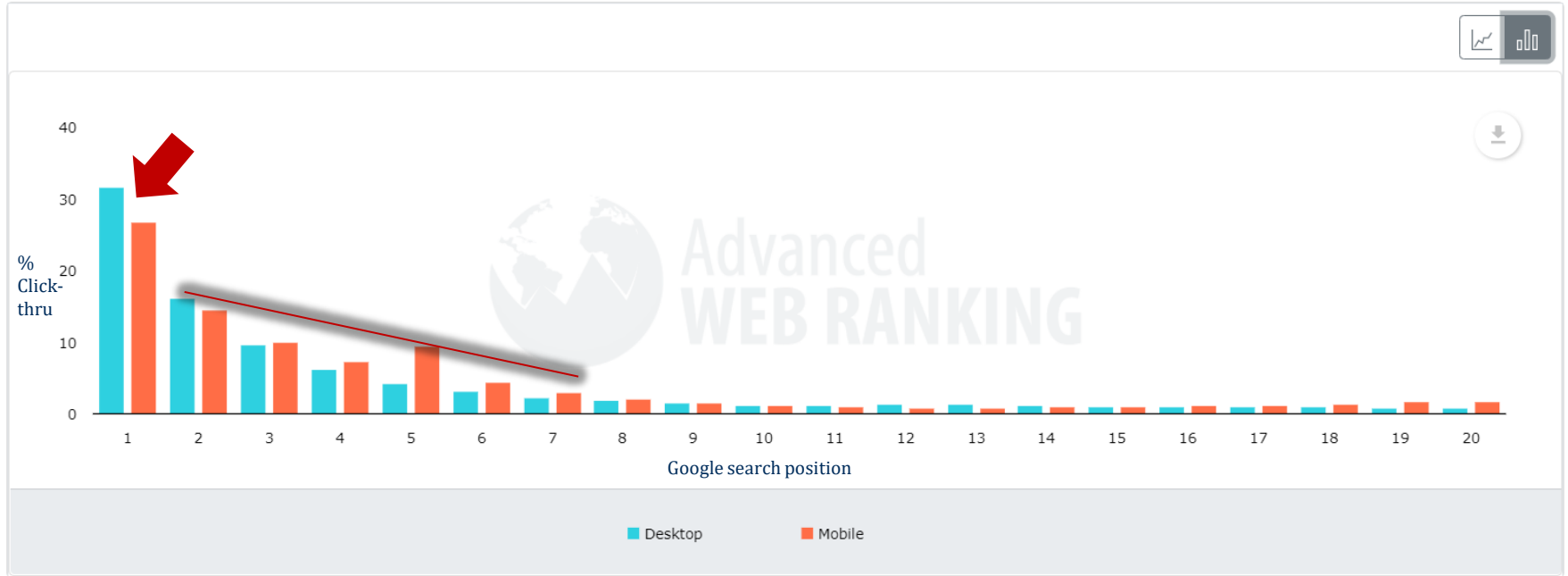
## First Step in Program Search



| 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% |



# National click-through rates per ranking position





# 4. Create an action plan that ensures that your SEO is updated regularly to drive results.

## How to Win

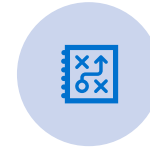
Search Engine Optimization



Effective SEO must be constantly attended to, it is not an event, it is a process.



**Assess:** Benchmark visibility based on organic sessions and current search ranking.



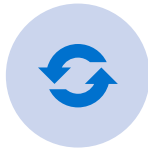
**Prioritize:** Establish a content strategy based on goals, trends and potential for lift.



**Assign:** Identify resources for management of SEO strategy and content development.



**Research and Write:** Develop keyword-driven, benefits-focused content for program and enrollment pages.



**Fix and Repeat:** Resolve content and technical errors to improve performance, and develop additional content and continue...

# SEO: Key performance indicators

*RNL State University vs. RNL College*

| Site               | Total Organic Keywords | Ranked on Page 1 | Ranked on Page 1 % Change | Ranked on Page 2 | Ranked on Page 2 % Change |
|--------------------|------------------------|------------------|---------------------------|------------------|---------------------------|
| rnlstate.edu/mba   | 33                     | 0                | 100.00% ▼                 | 1                | No Change                 |
| rnlcollege.edu/mba | 26                     | 10               | 28.57% ▼                  | 4                | 42.86% ▼                  |



RNL State

RNL College

Comparison of academic **search engine footprint**, based on the keywords each institution ranks for, the position they rank in, and the related search volume.



# Great example of utilizing SEO to drive leads

Google

how to pay for my masters degree

https://www.franklin.edu › blog › how-to-pay-for-a-ma...  
**How to Pay for a Master's Degree: 6 Big Tips For Working Adults**  
Look for scholarships and grants that match your personal background, industry and experience. Start with professional associations you belong to and branch out ...

People also ask

- How do people pay for a master's degree?
- How can I not pay for my masters degree?
- Does FAFSA cover a master's degree?

Feedback

https://www.forbes.com › advisor › student-loans › ho...  
**How To Pay For Grad School – Forbes Advisor**  
Aug 11, 2021 — **How To Pay** For Grad School · 1. Start Looking for Free Money · 2. Apply for Assistantships · 3. Utilize the Federal Work-Study **Program** · 4. Research ...  
[Compare Student Loan Rates...](#) · [Federal Loans For Graduate...](#) · [Private Loans For Graduate...](#)

https://www.usnews.com › paying › articles › 2013/03/12  
**Use These 5 Strategies to Pay for Graduate School**  
Mar 12, 2013 — Get an employer to **pay** for **graduate** school. Secure a **graduate** school scholarship. Work for the **graduate** school. Borrow smart. Use available ...  
[Work For The Graduate School](#) · [Borrow Smart](#) · [Find The Best Student Loans...](#)

FRANKLIN UNIVERSITY

DEGREES | ONLINE DEGREES | ADMISSIONS | TUITION & FINANCIAL AID | TRANSFERRING CREDIT | THE FRANKLIN EXPERIENCE

 **Back To College Blog**

BROWSE BY: Program Program Type Academic Level Topic



## How to Pay for a Master's Degree: 6 Big Tips For Working Adults



Master's Degree Paying for School

You know a master's degree can be pivotal to your success. You've read how it can help advance your career, increase your salary, or transition into a brand new field. But, how will

**Request Information**

STEP 1 STEP 2 SUBMIT

What type of program are you seeking?\*

-- Select Program Type --

What is your program of interest?

-- Select Program --

Step 1 of 3

**GET STARTED >**

In submitting my contact information, I understand that I will receive phone calls, text messages and email about attending Franklin University. I may opt out of these communications at any time.

Your privacy is important to us. [Privacy Policy](#)

**POPULAR POSTS**

**1** What Exactly Can You Do with A Business Degree? Quite a Lot.



# SEO Analysis: Program Page Performance



## Keyword Ranking by Search Volume

entries

| Keyword  | Blended Rank | Search Volume |
|--|--------------|---------------|
| masters curriculum and instruction                 | 40           | 1,300         |
| master in curriculum and instruction               | 50           | 1,300         |
| master curriculum and instruction                  | 41           | 1,300         |
| masters curriculum and instruction online          | 88           | 480           |
| masters of curriculum and instruction online       | 99           | 480           |
| online masters in curriculum and instruction       | 70           | 480           |
| masters in curriculum and instruction online       | 88           | 480           |
| master in curriculum and instruction online        | 83           | 480           |
| online masters curriculum and instruction          | 22           | 480           |
| masters of education curriculum and instruction    | 33           | 320           |
| masters of education in curriculum and instruction | 40           | 320           |
| master of education in curriculum and instruction  | 57           | 320           |
| online masters degree in teaching                  | 99           | 320           |
| master of education curriculum and instruction     | 52           | 320           |
| online masters degree for teachers                 | 63           | 320           |
| masters degree in curriculum and instruction       | 42           | 260           |
| online ma in education                             | 84           | 210           |

## Keyword Ranking by Rank

entries

| Keyword  | Blended Rank | Search Volume |
|--|--------------|---------------|
| ams reading certificate program                          | 17           | 0             |
| online masters curriculum and instruction                | 22           | 480           |
| masters of education curriculum and instruction online   | 27           | 70            |
| masters of education curriculum                          | 30           | 50            |
| masters of education curriculum and instruction          | 33           | 320           |
| curriculum and instruction degree                        | 35           | 170           |
| master of education curriculum                           | 39           | 50            |
| masters of education in curriculum and instruction       | 40           | 320           |
| masters curriculum and instruction                       | 40           | 1,300         |
| what is a masters in curriculum and instruction          | 41           | 20            |
| master curriculum and instruction                        | 41           | 1,300         |
| masters in curriculum development                        | 42           | 90            |
| online master of education in curriculum and instruction | 42           | 70            |
| masters degree in curriculum and instruction             | 42           | 260           |
| what is curriculum and instruction                       | 47           | 50            |
| master of arts in curriculum and instruction             | 47           | 50            |
| master in curriculum and instruction                     | 50           | 1,300         |
| master of education curriculum and instruction           | 52           | 320           |
| ma curriculum and instruction                            | 56           | 50            |



**What does SEO  
look like on your campus:  
web copy or optimized content?**

**Is SEO generating quality leads  
on your campus? Why or why not?**

# 5. Digital marketing (multi-channel/platform) is essential to ensuring students know your programs.

## How to Win

### Digital Marketing



Graduate and online students begin and end their search online. If you are not (effectively) advertising online, you are not visible to prospective students. The right channels, with the right messages, with constant updates and adjustment are essential.



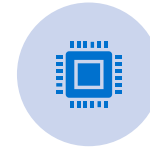
**Ensure adequate investment:** CLP/CPE have increased with added competition. You cannot win the student if they don't know you exist.



**Focus your strategy:** Student personas will help ensure you are connecting with the right prospects.



**Select the right channels:** Success relies on a multi-channel approach that matches where prospects are looking.



**Continually optimize for success:** There is no “set it and forget it.” Algorithms etc. require regular evaluation of ROI.



**Track regulatory changes:** The regulatory environment is in constant flux and as such must be monitored and adjusted for.

# Digital media are used by massive majorities of graduate and online students; marketing strategies should be aligned.

TABLE 15: SOURCES USED TO FIND ONLINE PROGRAMS OF INTEREST

UNDER-GRADUATE DEGREE

GRADUATE DEGREE

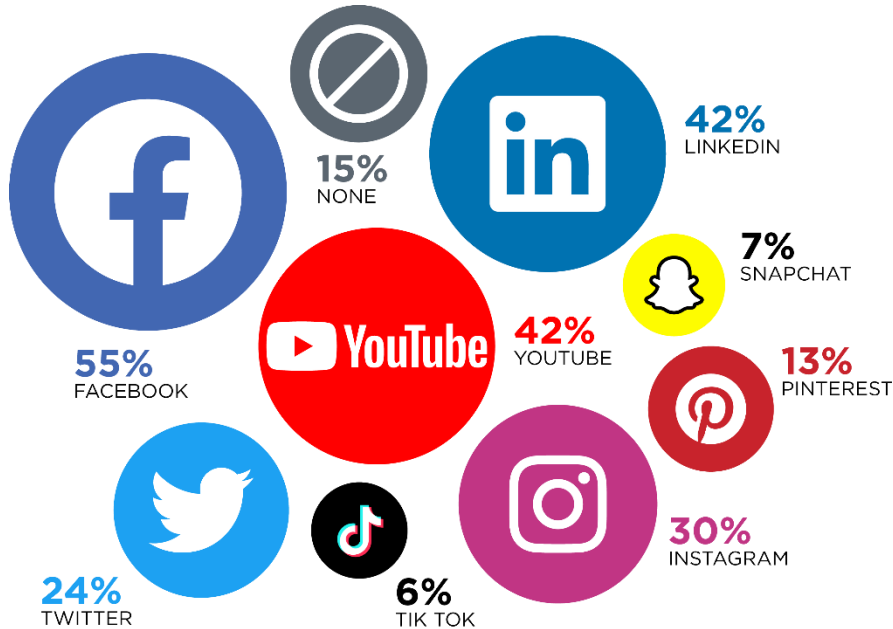
|                                       | UNDER-GRADUATE DEGREE | GRADUATE DEGREE |
|---------------------------------------|-----------------------|-----------------|
| Search engines                        | 89%                   | 85%             |
| College/program search sites          | 77%                   | 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%             |

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

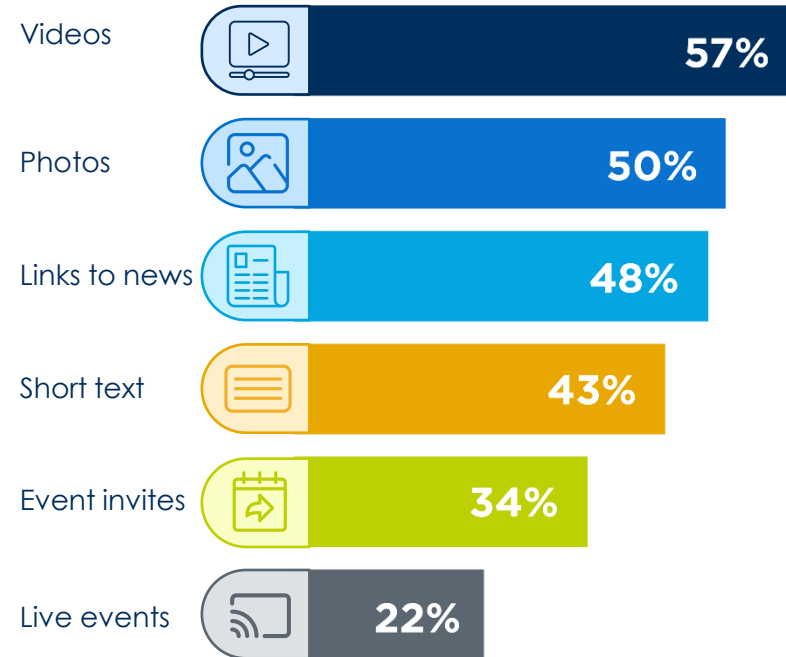


# 60+% of prospective students use social media in their search

## PREFERRED SOCIAL MEDIA FOR GRADUATE PROGRAM INFO



## PREFERRED CONTENT ON SOCIAL





# 6. Program-specific personas should be developed in order to maximize the click-through rate.

## How to Win

Digital Media



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.

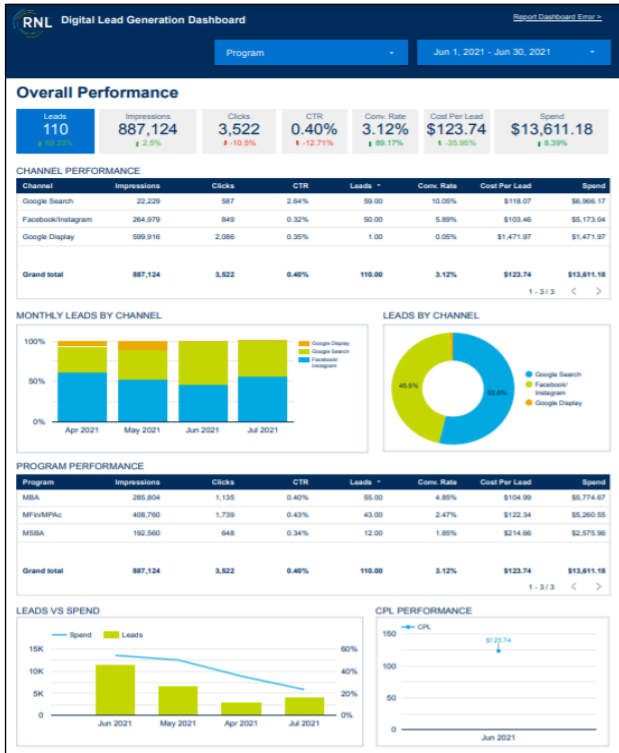
### Did you click on digital ads during search?



| 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% |



# Lead Source Reporting (Paid Digital)



- Analyze all paid efforts overall, but also by channel.
- Know and analyze the goals of each channel (i.e... Facebook vs Paid search, etc.)
- Most successful paid efforts are at the program level and include paid search, social, display, and programmatic plays.



# 7. Traditional media should be leveraged as part of an integrated media campaign, but in new ways.

## How to Win

### Traditional Media



Continuing to use traditional media in the manner that it was used in the past is likely ineffective, but leveraging digital tracking to ensure an understanding of ROI can make traditional marketing an important element in your campaigns.



**Direct Mail:** While mailing catalogs is a thing of the past, mailing post cards with QR codes makes this entirely measurable.



**Traditional Radio:** In many markets, traditional radio continues to be among the best ways to raise general visibility and awareness.



**Transit and Billboards:** Similar to direct mail, the inclusion of a QR code can turn a billboard or subway ad into a trackable asset.



**Traditional TV:** Provides broad reach and allows for competition with bigger brands.



**Out of Home:** Builds awareness and interest but is static.

# Traditional media are cited by as many as 40 percent of prospective students as one of their “go to” ways to learn.

| 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%             |

Lower usage but important to include in the mix





**How are you leveraging traditional media  
in new ways to support the overall  
strategy?**

## 8. Leverage existing leads and partnerships to grow lead sources.

# How to Win

## Existing Leads and Partnership



Every institution has relationships that are underutilized. Think creatively about where dormant leads may be hiding.



**Ensure that dormant leads are cultivated on a periodic basis.** There was a reason they approached you...



**Market your graduate programs to graduates of your undergraduate programs.** They already love you...



**Use institutional data to identify current partnership possibilities**

In what companies are alumni employed?

Where are our faculty networked and known?

What employers are providing tuition reimbursement/direct payment?



# Existing Leads & Partnerships

Outside data that can help you create new partnerships:  
(sources: *Lightcast*, BLS, etc.)

## Jobs in Greatest Demand in Business Fields

|  |   |   |                  |
|--|---|---|------------------|
| 124,676                                    | +6.0%                                   | \$33.81/hr<br>\$70.3K/yr                          | 13,099           |
| Jobs (2022)*<br>3% above National average* | % Change (2022-2027)*<br>Nation: +8.9%* | Median Earnings<br>Nation: \$30.07/hr; \$62.5K/yr | Annual Openings* |

| Occupation   | 2022 Jobs* | Annual Openings* | Median Earnings | Growth (2022 - 2027)* | Employment Concentration (2022)* |
|--|------------|------------------|-----------------|-----------------------|----------------------------------|
| Accountants and Auditors   | 19,838     | 1,942            | \$38.20/hr      | +4.91%                | 1.06                             |
| Management Analysts  | 19,482     | 2,242            | \$45.88/hr      | +9.91%                | 1.27                             |
| Market Research Analysts and Marketing Specialists   | 11,405     | 1,434            | \$32.95/hr      | +11.34%               | 1.18                             |
| Financial Managers   | 8,918      | 818              | \$70.65/hr      | +7.59%                | 1.16                             |
| Project Management Specialists   | 8,403      | 814              | \$46.38/hr      | +7.07%                | 0.82                             |
| Computer and Information Systems Managers  | 7,239      | 651              | \$77.83/hr      | +7.24%                | 1.01                             |
| Human Resources Specialists  | 6,359      | 719              | \$35.48/hr      | +7.75%                | 0.85                             |
| Chief Executives   | 5,529      | 449              | \$84.34/hr      | +2.88%                | 1.55                             |
| Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products | 5,182      | 513              | \$29.84/hr      | -3.16%                | 0.99                             |
| Marketing Managers   | 5,166      | 528              | \$67.16/hr      | +6.31%                | 1.32                             |

## Employers Most Frequently Looking for Nurses

### Top Companies Posting

| Company                                   | Total/Unique (Oct 2019 - Sep 2020) | Posting Intensity | Median Posting Duration |
|---|------------------------------------|-------------------|-------------------------|
| Cross Country Healthcare, Inc.            | 2,267 / 244                        | 9 : 1             | 28 days                 |
| Children's Hospital Medical Center        | 737 / 163                          | 5 : 1             | 19 days                 |
| Vanderbilt University                     | 1,303 / 116                        | 11 : 1            | 64 days                 |
| Medstaff Inc                              | 832 / 94                           | 9 : 1             | 32 days                 |
| Vanderbilt University Medical Center      | 949 / 92                           | 10 : 1            | 72 days                 |
| HCA Holdings, Inc.                        | 622 / 64                           | 10 : 1            | 51 days                 |
| United States Department of the Air Force | 228 / 57                           | 4 : 1             | 32 days                 |
| Allied Health Group Inc                   | 156 / 34                           | 5 : 1             | 16 days                 |
| Department of Veterans Affairs            | 248 / 29                           | 9 : 1             | 33 days                 |
| Fcs, Inc.                                 | 71 / 25                            | 3 : 1             | 19 days                 |



**Given the mix of your lead generation activity, do you have a healthy and balanced lead generation strategy?**

**What activities or additional strategies could help you generate more quality leads?**



# **RNL Regional Workshop**

Graduate and Online Enrollment



# 4

## Applying What You Learned: Next Steps in Making Change Happen





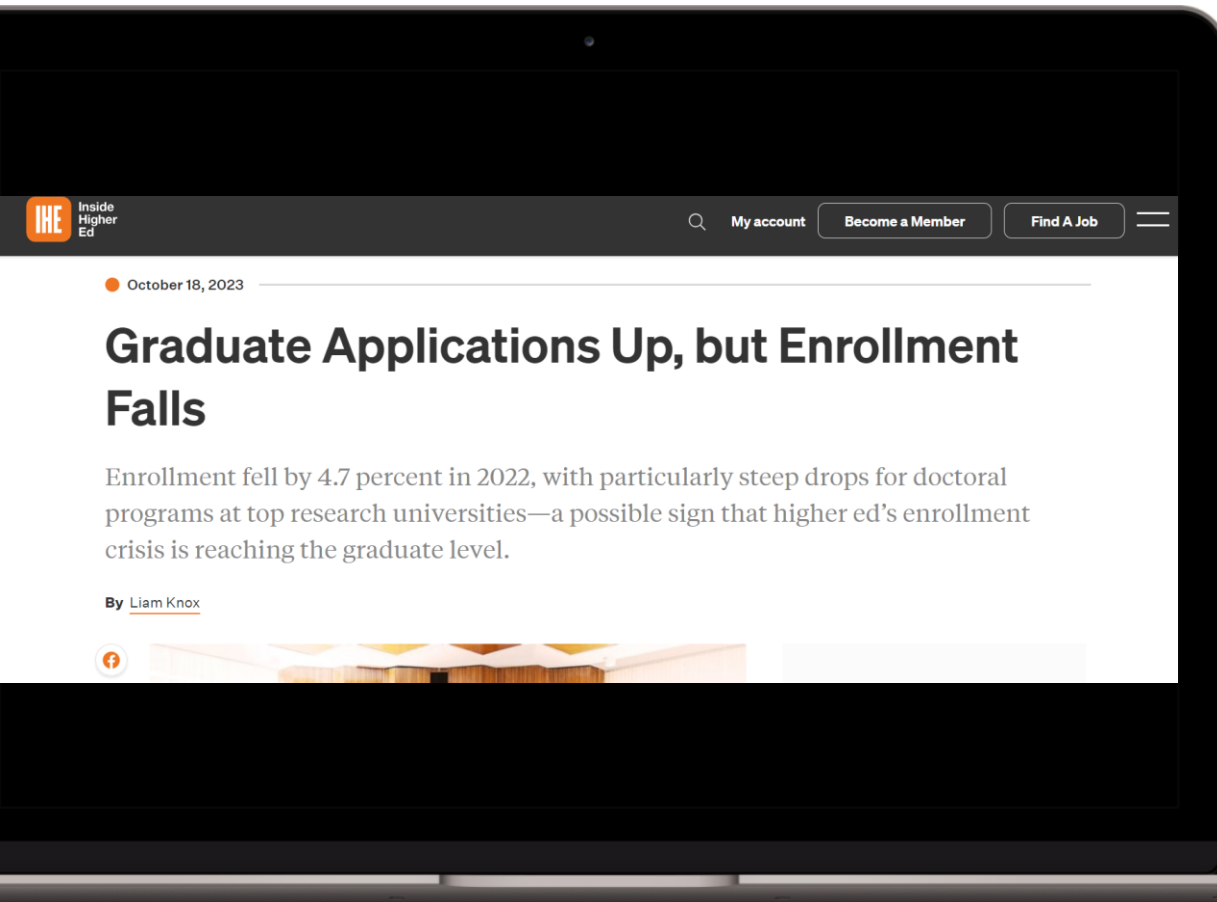
A person is shown from the chest down, wearing a blue checkered shirt. They are holding a smartphone in their right hand and looking at it. In the foreground, the keyboard of a laptop is visible. The entire image has a blue tint. Overlaid on the center of the image is the text "Q & A" in a white, sans-serif font.

Q & A

# RNL's Formula for Success



**= Success**



Did you see this recent headline?

Who's missing from the data?

SNHU  
Liberty  
Grand Canyon  
Capella  
Western Governors  
University of Phoenix

The background is a solid blue color. It features a faint grid pattern. Overlaid on the grid are two types of data visualizations: a network diagram consisting of interconnected circles and lines, and a bar chart with vertical bars of varying heights. The text is centered in the upper half of the image.

How to respond to  
decreasing employer  
demand for degrees?

# What everyone is talking about...

EDUCATION JULY 11, 2023

## Americans' Confidence in Higher Education Down Sharply

### Shifting Confidence in Higher Education Among Demographic Groups, 2015-2023

% of U.S. adults with "a great deal" or "quite a lot" of confidence in higher education

|                             | 2015<br>% | 2018<br>% | 2023<br>% | 2015-2023<br>change<br>pct. pts. |
|-----------------------------|-----------|-----------|-----------|----------------------------------|
| <b>Party identification</b> |           |           |           |                                  |
| Republicans                 | 56        | 39        | 19        | -37                              |
| Independents                | 48        | 44        | 32        | -16                              |
| Democrats                   | 68        | 62        | 59        | -9                               |
| <b>Education</b>            |           |           |           |                                  |
| No college degree           | 54        | 45        | 29        | -25                              |
| College degree only         | 57        | 50        | 47        | -10                              |
| Postgraduate degree         | 67        | 60        | 50        | -17                              |

Percent of the public that has confidence in higher ed:

48%

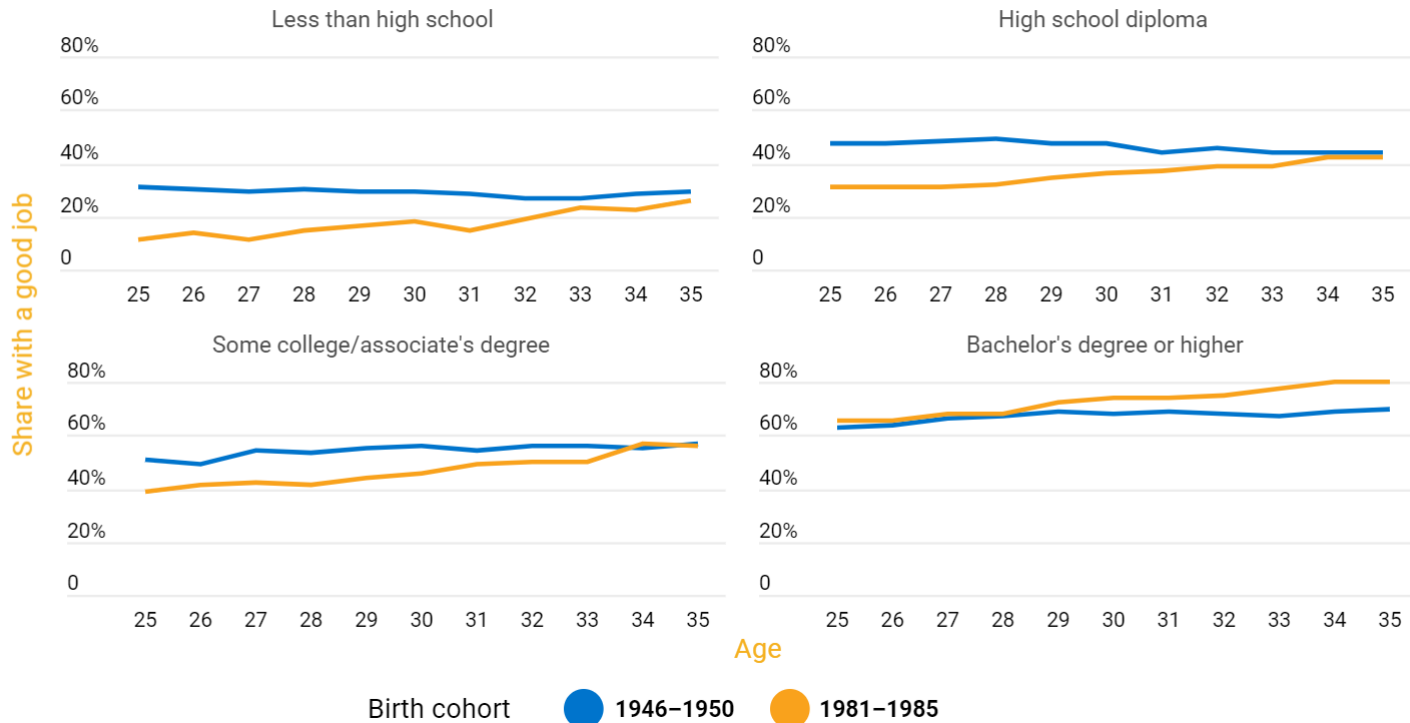
2018

36%

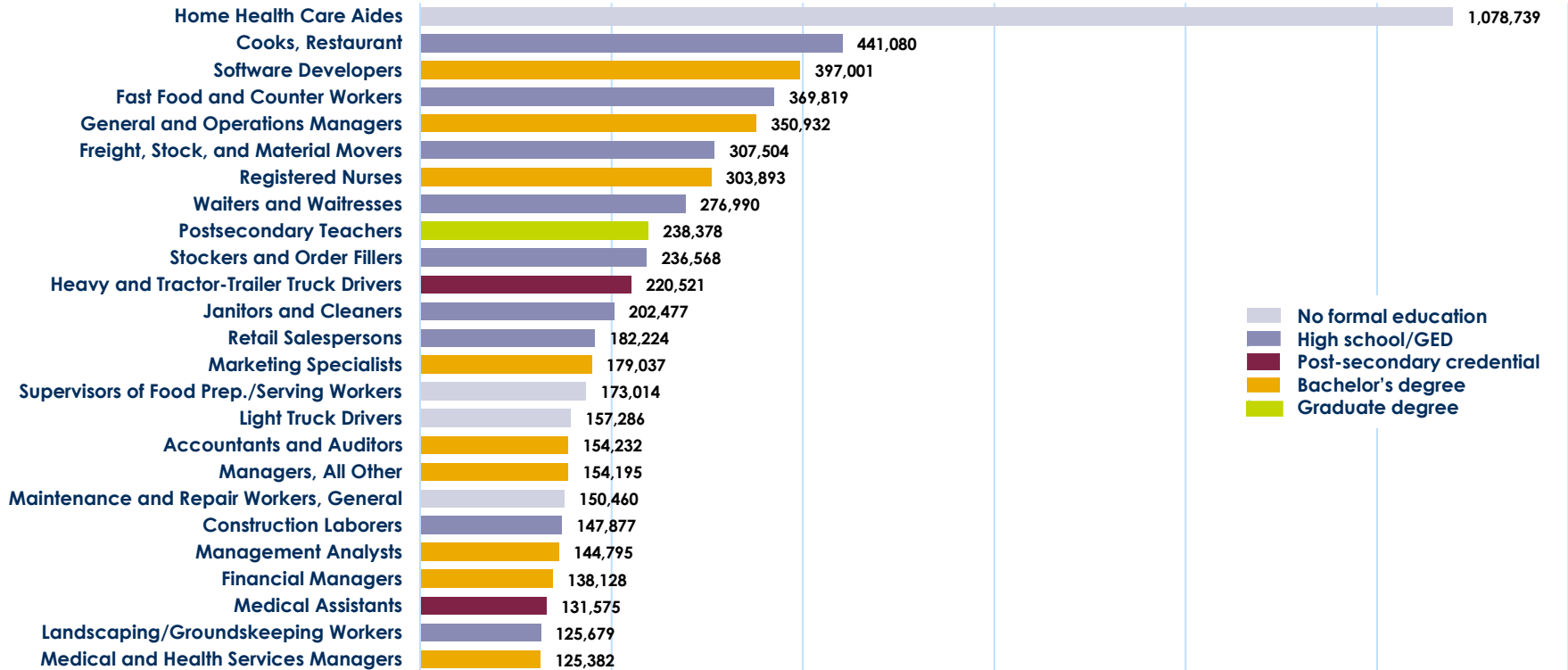
2023



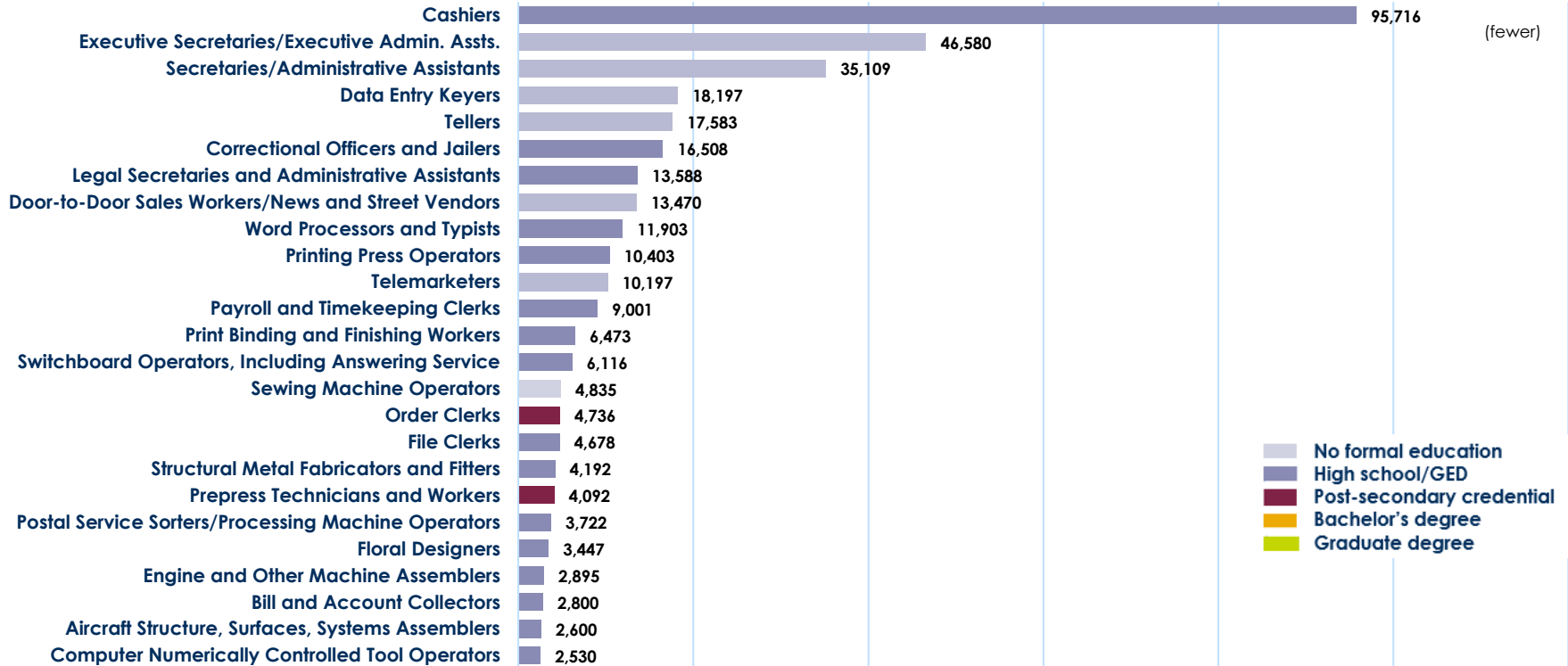
# What is driving these attitudes?



# Greatest Growth Occupations (2023-2032)



# Greatest Contracting Occupations (2023-2032)



Source: RNL analysis of U.S. Labor Department, Bureau of Labor Statistics data (retrieved 7/2023, via Lightcast)

# CEOs, Supervisors, and HR Leaders Differ on Alternative Credentials

The New York Times

OPINION  
GUEST ESSAY

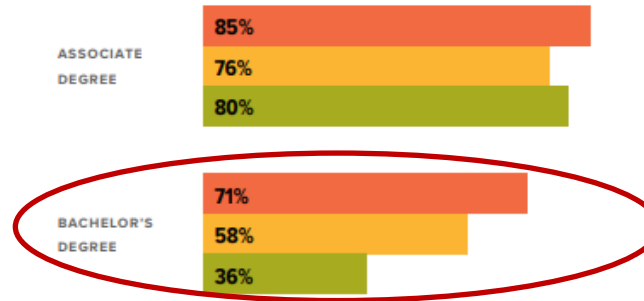
## Let's Stop Pretending College Degrees Don't Matter

Aug. 21, 2023

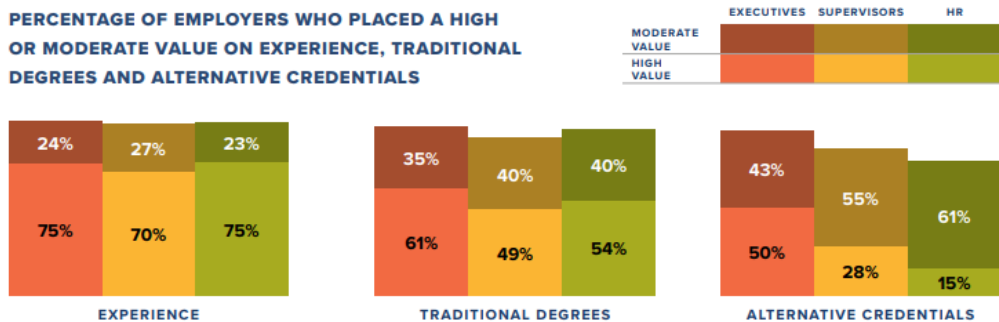
In April 2022, a [major study](#) by the Society for Human Resource Management, or S.H.R.M., found that 71 percent of executives said that some alternative credentials are equivalent to a bachelor's degree. But only 58 percent of supervisors (most likely beneath those executives on the organization chart) concurred, a figure that fell to 36 percent for human resources professionals, or those typically closest to hiring decisions.

### PERCENTAGE OF EMPLOYER GROUPS AGREEING CERTAIN ALTERNATIVE CREDENTIALS EQUATE TO EDUCATION

EXECUTIVES SUPERVISORS HR PROFESSIONALS



### PERCENTAGE OF EMPLOYERS WHO PLACED A HIGH OR MODERATE VALUE ON EXPERIENCE, TRADITIONAL DEGREES AND ALTERNATIVE CREDENTIALS



Source: <https://shrm.org/foundation/about/Documents/The%20Rise%20of%20Alternative%20Credentials%20In%20Hiring.pdf>



How to think about  
identifying new  
degree areas

# Choosing/Prioritizing Programs

*Success is rooted in a balance between market demand and institutional strength. How do you order your internal factors?*

INTERNAL

Will



Capacity



Culture



Expertise



EXTERNAL

Market Demands

Trends

Expertise



# Landscape, Road Map, and Mirror



## LANDSCAPE

Do you know the terrain will be to travel? A Quantitative assessment of the demand and supply characteristics confronting each program in your market helps you plan for success.



## ROAD MAP

Do you know how to navigate the terrain? Qualitative investigation of specific competitors will ensure you can differentiate your program in a crowded market. Differentiation is more than a unique program name.



## MIRROR

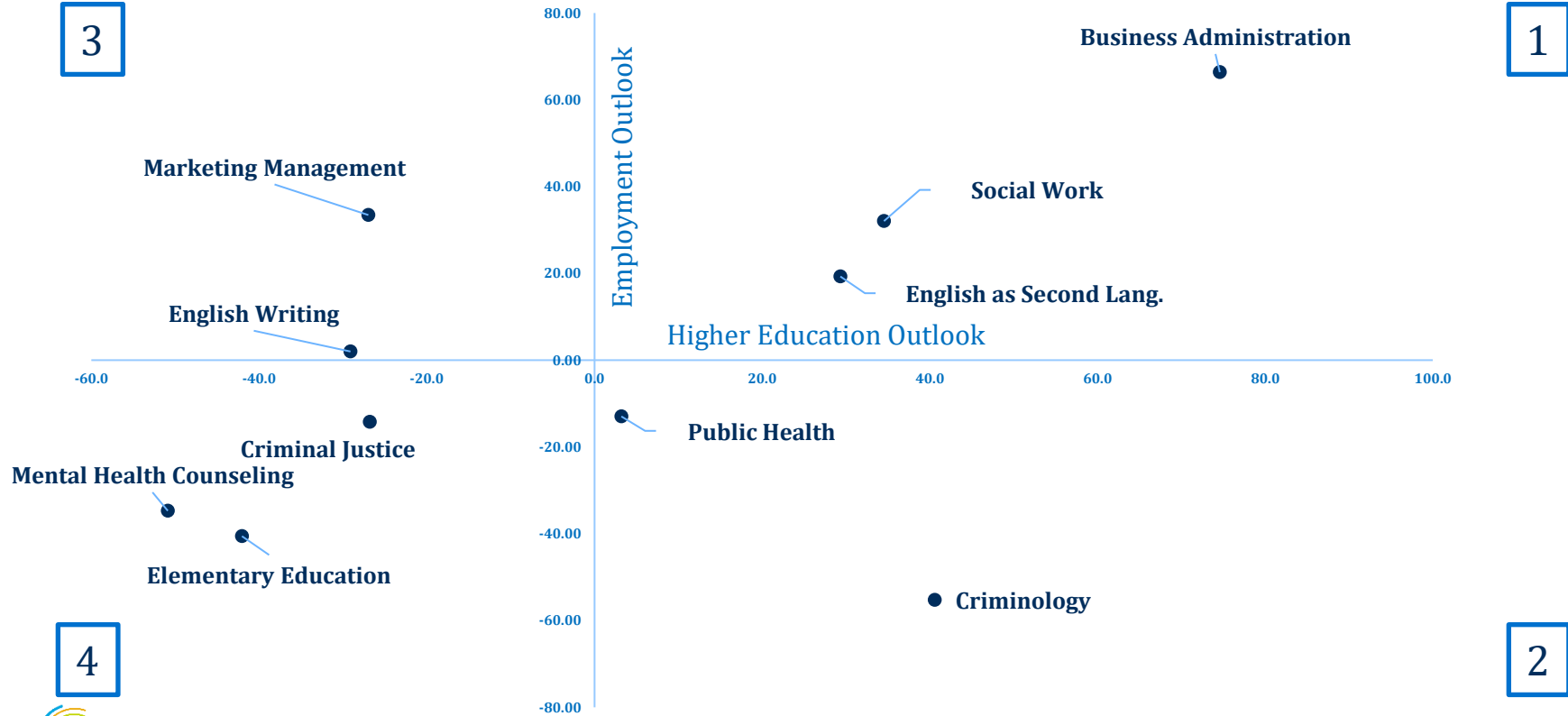
What do others think of you as a provider? Do you programs align with those perceptions? Surveying your audience(s) will help you understand how you fit into your regional (and wider) market.

# Largest Master (1-25) Programs (100-mile radius)

| Program                                    | ALL Master's              |            |              |                 |                 |                              |                      | Online Master's              |                |                 |                 |                              | Related Occupations |                 |                          |
|--|---------------------------|------------|--------------|-----------------|-----------------|------------------------------|----------------------|------------------------------|----------------|-----------------|-----------------|------------------------------|---------------------|-----------------|--------------------------|
|  | 2019 ALL Master's Degrees | Rank - ALL | Client Total | 5-Year Growth # | 5-Year Growth % | Average Annual Growth (CARG) | Online as % of Total | Online Master's Degrees 2019 | Rank - ON-LINE | 5-Year Growth # | 5-Year Growth % | Average Annual Growth (CARG) | 2020 Jobs           | Annual Openings | Proj. Growth (2020-2030) |
| Business Administration                    | 3,584                     | 1          | -            | (247)           | -6.4%           | -1.3%                        | 61%                  | 2,189                        | 1              | 205             | 10%             | 2%                           | 281,501             | 23,537          | 15,987                   |
| Social Work                                | 1,693                     | 2          | -            | 399             | 30.8%           | 5.5%                         | 19%                  | 320                          | 3              | 320             | Insf. Data      | #DIV/0!                      | 50,913              | 4,871           | 4,209                    |
| Educational Leadership and Admin.          | 796                       | 3          | -            | 16              | 2.1%            | 0.4%                         | 38%                  | 306                          | 5              | 76              | 33%             | 6%                           | 12,774              | 883             | (56)                     |
| Accounting                                 | 755                       | 4          | -            | (145)           | -16.1%          | -3.5%                        | 8%                   | 62                           | 31             | 23              | 59%             | 10%                          | 71,042              | 6,039           | 1,651                    |
| Mechanical Engineering                     | 669                       | 5          | -            | 206             | 44.5%           | 7.6%                         | 33%                  | 219                          | 8              | 3               | 1%              | 0%                           | 79,768              | 5,202           | (164)                    |
| Electrical Engineering                     | 609                       | 6          | -            | 121             | 24.8%           | 4.5%                         | 25%                  | 150                          | 16             | -22             | -13%            | -3%                          | 33,857              | 2,254           | 907                      |
| Occupational Therapy                       | 577                       | 7          | -            | 131             | 29.4%           | 5.3%                         | 21%                  | 124                          | 23             | 44              | 55%             | 9%                           | 8,081               | 511             | 621                      |
| Organizational Leadership                  | 550                       | 8          | -            | 149             | 37.2%           | 6.5%                         | 91%                  | 501                          | 2              | 165             | 49%             | 8%                           | 169,348             | 14,092          | 10,741                   |
| Education                                  | 541                       | 9          | 1            | (167)           | -23.6%          | -5.2%                        | 25%                  | 134                          | 22             | -71             | -35%            | -8%                          | 135,323             | 9,228           | (2,072)                  |
| Business Admin., Mgmt. and Operations      | 536                       | 10         | 156d         | (147)           | -21.5%          | -4.7%                        | 59%                  | 317                          | 4              | -217            | -41%            | -10%                         | 60,280              | 5,180           | 3,494                    |
| Curriculum and Instruction                 | 491                       | 11         | -            | (26)            | -5.0%           | -1.0%                        | 49%                  | 242                          | 6              | -83             | -26%            | -6%                          | 6,658               | 596             | 214                      |
| Business Management                        | 423                       | 12         | -            | (78)            | -15.6%          | -3.3%                        | 0%                   | 0                            | n/a            | -193            | -100%           | -100%                        | 268,500             | 21,781          | 14,840                   |
| Physician Assistant                        | 402                       | 13         | -            | 67              | 20.0%           | 3.7%                         | 0%                   | 0                            | n/a            | -37             | -100%           | -100%                        | 7,348               | 582             | 1,548                    |
| Public Administration                      | 399                       | 14         | -            | (123)           | -23.6%          | -5.2%                        | 35%                  | 139                          | 19             | -3              | -2%             | 0%                           | 164,850             | 13,207          | 9,382                    |
| Industrial Engineering                     | 393                       | 15         | -            | 181             | 85.4%           | 13.1%                        | 19%                  | 74                           | 27             | 60              | 429%            | 40%                          | 70,724              | 4,685           | 2,001                    |
| Teacher Educ./Prof. Dev., Specific Levels  | 377                       | 16         | -            | 143             | 61.1%           | 10.0%                        | 16%                  | 59                           | 33             | 53              | 883%            | 58%                          | 19,269              | 2,200           | 965                      |
| Health Care Administration/Management      | 371                       | 17         | -            | (91)            | -19.7%          | -4.3%                        | 53%                  | 195                          | 10             | 26              | 15%             | 3%                           | 19,265              | 1,923           | 4,374                    |
| Registered Nursing/Registered Nurse        | 363                       | 18         | -            | 52              | 16.7%           | 3.1%                         | 41%                  | 149                          | 17             | -6              | -4%             | -1%                          | 160,526             | 8,721           | 5,505                    |
| Counselor Education/School Counseling...   | 359                       | 19         | 21           | (125)           | -25.8%          | -5.8%                        | 11%                  | 38                           | 50             | 0               | 0%              | 0%                           | 12,966              | 1,237           | 456                      |
| Information Sciences                       | 334                       | 20         | -            | 80              | 31.5%           | 5.6%                         | 24%                  | 81                           | 25             | 51              | 170%            | 22%                          | 97,780              | 7,109           | 5,749                    |
| Family Practice Nursing                    | 317                       | 21         | -            | 73              | 29.9%           | 5.4%                         | 3%                   | 8                            | 117            | -115            | -93%            | -42%                         | 9,758               | 919             | 3,523                    |
| Library and Information Science            | 309                       | 22         | -            | (107)           | -25.7%          | -5.8%                        | 72%                  | 222                          | 7              | -194            | -47%            | -12%                         | 6,484               | 582             | 0                        |
| Special Education and Teaching             | 288                       | 23         | -            | (67)            | -18.9%          | -4.1%                        | 48%                  | 139                          | 20             | 101             | 266%            | 30%                          | 12,870              | 940             | 102                      |
| Human Resources Management...              | 281                       | 24         | -            | (116)           | -29.2%          | -6.7%                        | 74%                  | 209                          | 9              | -89             | -30%            | -7%                          | 64,974              | 5,918           | 934                      |
| Architectural/Building Sciences/Technology | 274                       | 25         | -            | 274             | Insf. Data      | #DIV/0!                      | 14%                  | 38                           | 51             | 38              | Insf. Data      | #DIV/0!                      | 102,190             | 8,409           | 3,151                    |




# Program Prioritization Matrix – All Program Formats



4

2



How to effectively  
differentiate new  
programs in a  
crowded market?

# Graduate (and online) students say that the match between content and interests is the most important factor in selecting a program.

Content “fit,” online and hybrid options, and affordable tuition guide enrollment decisions.

| MOST IMPORTANT FACTORS IN ENROLLMENT DECISION* (SELECT THREE) | CLASSROOM | HYBRID | ONLINE |
|---|-----------|--------|--------|
| Program content I want  | 51%       | 45%    | 53%    |
| Online/hybrid courses available                               | 8%        | 28%    | 47%    |
| The lowest tuition (among programs I am considering)          | 33%       | 35%    | 42%    |
| Positive career opportunity and job placement information     | 46%       | 39%    | 32%    |
| University's reputation                                       | 41%       | 35%    | 29%    |
| Being able to enroll in courses year-round                    | 17%       | 16%    | 23%    |
| Having accelerated (shorter) terms                            | 13%       | 14%    | 19%    |
| Having specific faculty with whom you want to study           | 29%       | 19%    | 11%    |
| Their plans for dealing with the pandemic                     | 14%       | 14%    | 8%     |

*\*Respondents chose their three most important factors.*

# You differentiate through the language you use, the information you provide...

## Program Descriptive Language

We analyze the content and tone of the primary program descriptions that are presented by each competitor on program webpages because this helps us understand how they position the program to stand out among competitors.

Program descriptions can be “student-focused,” focusing on what the program will do for the student, or “institution-focused” focusing on what the program brings to the student. Some combination of the two. As increasing numbers of students indicate that the match between the program content and their own interests is the most important enrollment decision factor (RNL, Graduate Student Report, 2021), it has become more important for institutions to lead with what the program will do for the student in life, work, and community – rather than focusing on specific pedagogy, institutional mission, philosophy, or reputation.

In what follows we highlight key passages that we identified as critical to framing how visitors view the program from their first review of material.

| Chamberlain University   | DePaul University   | Purdue University Northwest  | University of St Francis  |
|--|---|--|---|
| <b>Primary Program Description</b>   |   |  |   |
| <p><b>By Nurses, For Nurses</b><br/>Our 100% doctorally-prepared faculty use their nursing experience to help you grow. Join a CCNE-accredited nursing school with more than 130 years of history educating nurses.</p> <p><b>You're in Good Company</b><br/>You'll join a network of more than 90,000 students and alumni nationwide who step forward to support each other - and their patients.</p> <p><b>8 Specialty Track Options</b><br/>Specialize your practice as you earn your MSN degree. Choose from specialty tracks including healthcare policy, nurse educator, nurse executive, nursing informatics, family nurse practitioner, adult-</p> | <p><b>Earn the credentials to advance your career</b><br/>If you're a registered nurse, DePaul's MS in Nursing program will help you develop the skills and credentials you need to become a nurse administrator, nurse educator, family nurse practitioner or adult-gerontology nurse practitioner. We'll tailor the program for you depending on your educational background.</p> <p>If choosing nurse educator or nurse administrator track, you'll earn a Master of Science in Nursing through DePaul; and a certificate in health administration or health professions education through DePaul's alliance</p> | <p>Elevate your career with Purdue University Northwest's online Master of Science in Nursing (MSN). Discover a high-quality and affordable pathway to your next nursing credential. Power onward in your nursing career with PNW.</p> <p><b>Online Flexibility for Working Nurses</b></p> <ul style="list-style-type: none"> <li>• Customize your path and pace to fit your busy nursing schedule.</li> <li>• Complete your practicum hours where you work.</li> <li>• Graduate with your master's degree in nursing in two years or less.</li> </ul> | <p><b>Who are USF MSNs?</b><br/>As a master's graduate of Leach College of Nursing, you can take on the role of an advanced nurse who functions in a family nurse practitioner, psychiatric mental health nurse, nurse educator, or nurse administrator role. The MSN is a valuable, respected degree. Advanced practice nurses are often called on to assume leadership roles in the profession and in health care delivery.</p> <p>As a graduate you will incorporate your education and research into a practice that is reflective of the dynamic needs of a diverse population. Through the advanced role you will be instrumental in ensuring</p> |

## WEBSITE BEST PRACTICES

Because undergraduate students conduct almost the entirety of their search process online, and then make their enrollment decisions largely based on the information they can (or cannot) find on institutional websites, it is more important than ever for institutional websites to ensure that they're following many of the best practices that are commonly found on the sites of other services with which prospective students interact regularly. 2021 RNL data indicates that nearly 80 percent of both prospective undergraduate and graduate students have watched a video on an institutional/program page; that more than half have used a chat feature; and that an information request form is the most common way to make first contact with the programs that interest them. For these reasons, we assess how each of these are done at competitor programs/institutions.

| Franklin University  | Ohio Christian University  | Ohio State University   | University of St. Francis   |
|--|--|---|---|
| <b>Website Best Practices: Use of Video, Chat, Information Request Form</b>  |  |   |   |
| <b>Video:</b> Not present on home page   | <b>Video:</b> Not present on home page   | <b>Video:</b> Not present on home page  | <b>Video:</b> Not present on home page  |
| <b>Chat:</b> None  | <b>Chat:</b> None  | <b>Chat:</b> Yes, but it is not on the home page. Therefore, obtaining information through chat features is more difficult than searching an FAQ page.  | <b>Chat:</b> Yes, but it is not on the home page. Therefore, obtaining information through chat features is more difficult than searching an FAQ page.  |
| <b>Information Request Form:</b> A pop-up window appears as users scroll that leads to an information request form. There are also action buttons to Request Info at the top of the vertical navigation bar and just below the main image, as well as an embedded form within the body of the home page. | <b>Information Request Form:</b> Prominently positioned at the very top of the home page is an embedded information request form.                            | <b>Information Request Form:</b> There is a top and an action "sticky" bar at the contact staff, both lead to a list of contact numbers, but no information request form. There are links within the home page that lead to university staff (e.g., program staff). | <b>Information Request Form:</b> There is a top and an action "sticky" bar at the contact staff, both lead to a list of contact numbers, but no information request form. There are links within the home page that lead to university staff (e.g., program staff). |
| <b>General Navigation Summary:</b> Most, if not all, of the information prospective students need is available and navigation is intuitive.  | <b>General Navigation Summary:</b> Most, if not all, of the information prospective students need is available and navigation is somewhat intuitive. Because | <b>General Navigation Summary:</b> Most, if not all, of the information prospective students need is available and navigation is intuitive. However   | <b>General Navigation Summary:</b> Most, if not all, of the information prospective students need is available and navigation is intuitive. However   |

## Video: How Programs Compare with Valparaiso University

More than 70 percent of prospective students watch videos during their search for study. Like three of its competitors, Valparaiso University does not include a video on its home page. Only University of Maryland Global provides a video. It's about one minute long and narrated by a graduate who is depicted at home with her family, as well as in an interview setting, and talks about the benefits of the program.

## Examples of Videos UNIVERSITY OF MARYLAND GLOBAL



Cate Reich wanted to be a role model to her children and to give back to her country. She decided to earn an MS in Cybersecurity. UMGC's reputation and flexibility were the perfect fit for Cate's busy life. What's more, Cate's UMGC courses were not only immediately useful to her work, they also allowed her expand her career while making the world a safer place.

# ...and the options that you provide students to customize their program.

Valparaiso University – Competitor Analysis

| Master of Science in Cybersecurity  |   |   |  |  |           |                            |
|---|---|---|--|--|-----------|----------------------------|
| Institution, Program Name, and Home Page  | Total Credits   | Required Courses  | Concentrations/ Specializations  | Culminating Experience: Thesis/Capstone  | Format(s) | Schedules: Semesters/Terms |
| <b>DePaul University</b><br><b>MS in Cybersecurity</b><br><a href="https://www.cdm.depaul.edu/academics/pages/MS-In-Cybersecurity.aspx">https://www.cdm.depaul.edu/academics/pages/MS-In-Cybersecurity.aspx</a> | 52 quarter credits/17 courses (equivalent to 35 semester credits) | <b>Governance, Risk Management and Compliance and Networking and Infrastructure</b> <ul style="list-style-type: none"> <li>NET 405 Network Fundamentals</li> <li>NET 411 Introduction to Computer and Network Systems</li> <li>NET 413 Introduction to Lan Technologies</li> <li>CSEC 418 Introduction to Host Security</li> </ul> <b>Computer Security</b> <ul style="list-style-type: none"> <li>CSC 400 Discrete Structures for Computer Science</li> <li>CSC 401 Introduction to Programming</li> <li>CSC 402 Data Structures I</li> <li>CSC 403 Data Structures II</li> <li>CSC 406 Systems I</li> <li>CSC 407 Systems II</li> </ul> | <ul style="list-style-type: none"> <li>Computer Security</li> <li>Governance, Risk Management and Compliance</li> <li>Networking and Infrastructure</li> </ul> | <b>Computer Security and Networking and Infrastructure.</b><br><i>Students have the option of completing the Information Security Governance course, the Computer Information and Network Security Capstone course, or completing a Master's Research Project. If a student chooses to complete a Master's Research project for 8 credit hours, 4 credit hours of CSC 695 replaces one major or open elective course. A student who completes a Master's Research project also has the option of completing a Master's Thesis.</i> | Online    | 10-week terms              |

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**Examples of Career Information Presentation**  
**CONCORDIA UNIVERSITY CHICAGO**

**INFORMATION ON RELATED CAREERS**

2021 data on the enrollment decision making patterns of prospective students indicate that positive career outlook and/or positive outcomes data on the employment of recent graduates is the second most frequently cited factor in choosing graduate programs/institutions. This is a function of the combination of the cost of higher education, the soft job market in many fields, and the rising skepticism of many about the value of a college education after a generation of dreamers have had to return to school in order to equip themselves with useable job skills.

Therefore, it is mission critical for successful programs to prominently present as much detailed information as possible in order to attract students to their programs. While programs and institutions are doing better—although not great—at presenting some information on career prospects, these data tend to be superficial, without detail or clickable links, and almost completely devoid of data on the success of recent graduates of the specific institution the visitor is considering. With this in mind, we evaluate the related career information that is presented by programs and institutions.

| Concordia University Chicago  | University of Cincinnati   | University of Indianapolis  |
|---|--|---|
| <b>Information on Related Careers</b>   |  |   |
| <p><b>Medium-High.</b> The home page includes a section "What Can You Do With a Master's in Sports Leadership?" that includes headshots of four (presumed) alumni with their position titles, as well as a bulleted list of potential positions.</p> <p><b>What Can You Do With a Master's in Sports Leadership?</b><br/> <i>The Sports Industry Needs More Business Leaders - You Can Fill That Need</i></p> | <p><b>Medium-High.</b> Clicking on Careers leads to an entire webpage dedicated the career outlook of graduates.</p> <p><b>Career Outlook</b><br/> <i>Obtaining employment in sport requires a distinctive game plan that often draws heavily on face-to-face networking with industry professionals. That's why we developed our online Master of Science in Sport Administration program designed to leverage the Bearcat Nation's vast alumni network and UC faculty members with close industry connections.</i></p> | <p><b>Low.</b> The home page includes a "Potential Careers" section that comprises a short list of general position titles.</p> <p><b>POTENTIAL CAREERS</b><br/> <i>The MS in sport management prepares you for a variety of roles in athletic administration.</i></p> <ul style="list-style-type: none"> <li>Compliance</li> <li>Facility/operations management</li> <li>Ticket office management</li> <li>Development (sales, sponsorship, fundraising)</li> <li>Public relations</li> <li>Business office management</li> <li>Human resource management</li> </ul> |
| <b>Information on the Career Outcomes of Recent Graduates</b>   |  |   |
| <p><b>Low.</b> There are headshots of what we presume are four alumni along with their position titles.</p>   | <p><b>Low.</b> Under "Testimonials," users can watch two videos, which comprise alumni stories.</p>  | <p><b>None.</b> No information on the career outcomes of recent graduates is presented.</p>   |



# Thank you for attending!

## EVALUATION FORM

Please complete evaluation form and leave at the table or hand to an RNL staff member.

## RESOURCES

Resources are at the check-in table and online. An email will be sent out with a copy of the slides from today.

## CONNECT WITH RNL

Let us know if you'd like to connect to discuss how we are partnering with campuses in any of the following areas:

- OPM alternative
- Conversion
- Lead generation with full-funnel attribution
- Instructional design
- Consulting and research



OFFER TO RNL  
WORKSHOP PARTICIPANTS

## Access to RNL's latest report: the 2023 Graduate Student Recruitment Report



*scan me*

# Thank You

*We appreciate your time and look forward to further conversations with your teams!*

<https://www.ruffalonl.com/graduate-online-enrollment-solutions/>



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