



Marketing and Enrollment Management Benchmarks 2022

Trends in Higher Education Marketing and Student Engagement

Benchmarks 2022

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Over the last year, education has undergone a transformation. Some of the changes that first seemed like temporary adjustments to accommodate the pressures of a pandemic have become permanent fixtures of the education landscape. Most universally, this year has revealed a demand for flexibility in higher education.

Lifestyles have shifted. Online and distributed lifestyles are becoming commonplace, with more people demanding the ability to work and study remotely and on their schedule.

Meanwhile, enrollment is declining. Those that are enrolling are more likely to be members of the workforce with responsibilities beyond completing their next credential. While schools face many enrollment and growth challenges, there is also an opportunity for schools that are able to create flexible solutions.

Forward-thinking colleges and universities have realized that old assumptions no longer apply. The needs of students have changed – are still changing – and online and non-traditional programs must change with them. This extends beyond formats to include where and how institutions market programs. To reach these students where they are, institutions must understand the trends affecting both education and marketing in a permanently reshaped landscape.

Throughout this report, we provide higher education leaders with the information and understanding they need to better focus on and serve today's student – those non-traditional, online, working adults that are seeking to balance competing priorities while following a path to a better life through education.

First, focus on the student

The makeup of the student population has shifted. The profile of the average student had started to shift even before the pandemic. Fewer 18 to 24-year-olds enrolled directly out of high school. That population was being replaced by students who were older, had job experience, and may have been returning to school after some time away.

Over the last year that shift has become a tidal wave. Even before the number of high school graduates decreases, their rate of post-secondary enrollments is falling. Colleges and universities can no longer depend on traditional students to meet their enrollment goals.

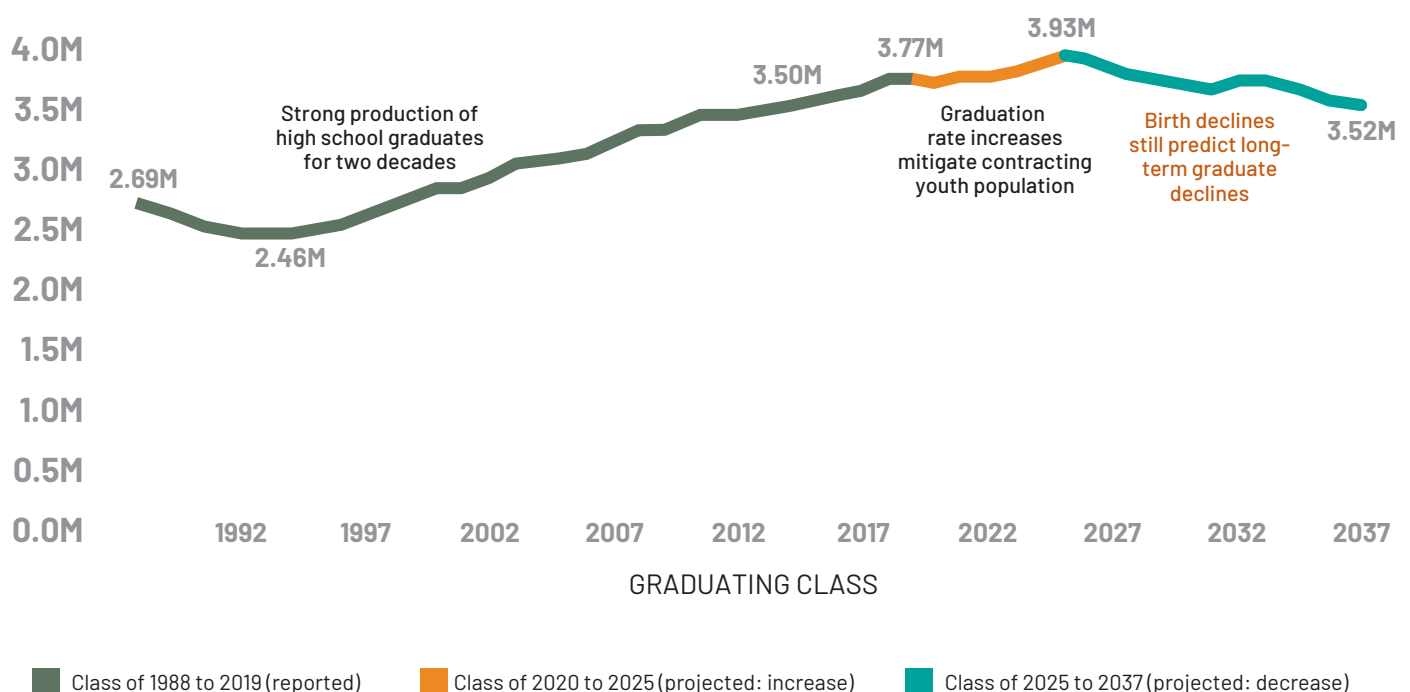
Today, more 18 to 24-year-olds are jumping straight into the workforce. Working students want and need more control over when, where, and how they complete education programs. These preferences are driving their education choices. They need flexible programs that fit their lifestyles.

At the same time, student populations are becoming more diverse. In addition to more working students, colleges and universities are welcoming more first-generation college students. These students value and rely on support services, flexibility and multiple points of entry. But, simply offering all of this is not enough for schools to succeed. They must also communicate and engage students where they are with messages that resonate.

In short, all of this makes one conclusion abundantly clear: **To survive in the reshaped higher ed landscape, institutions must adjust both their recruitment strategy and retention efforts to better serve the online and non-traditional student population.**

ENROLLMENT TRENDS

The high school graduate pipeline is about to slow. The number of higher school graduates is expected to peak at 3.9M with the class of 2025, but will decline over the following years.

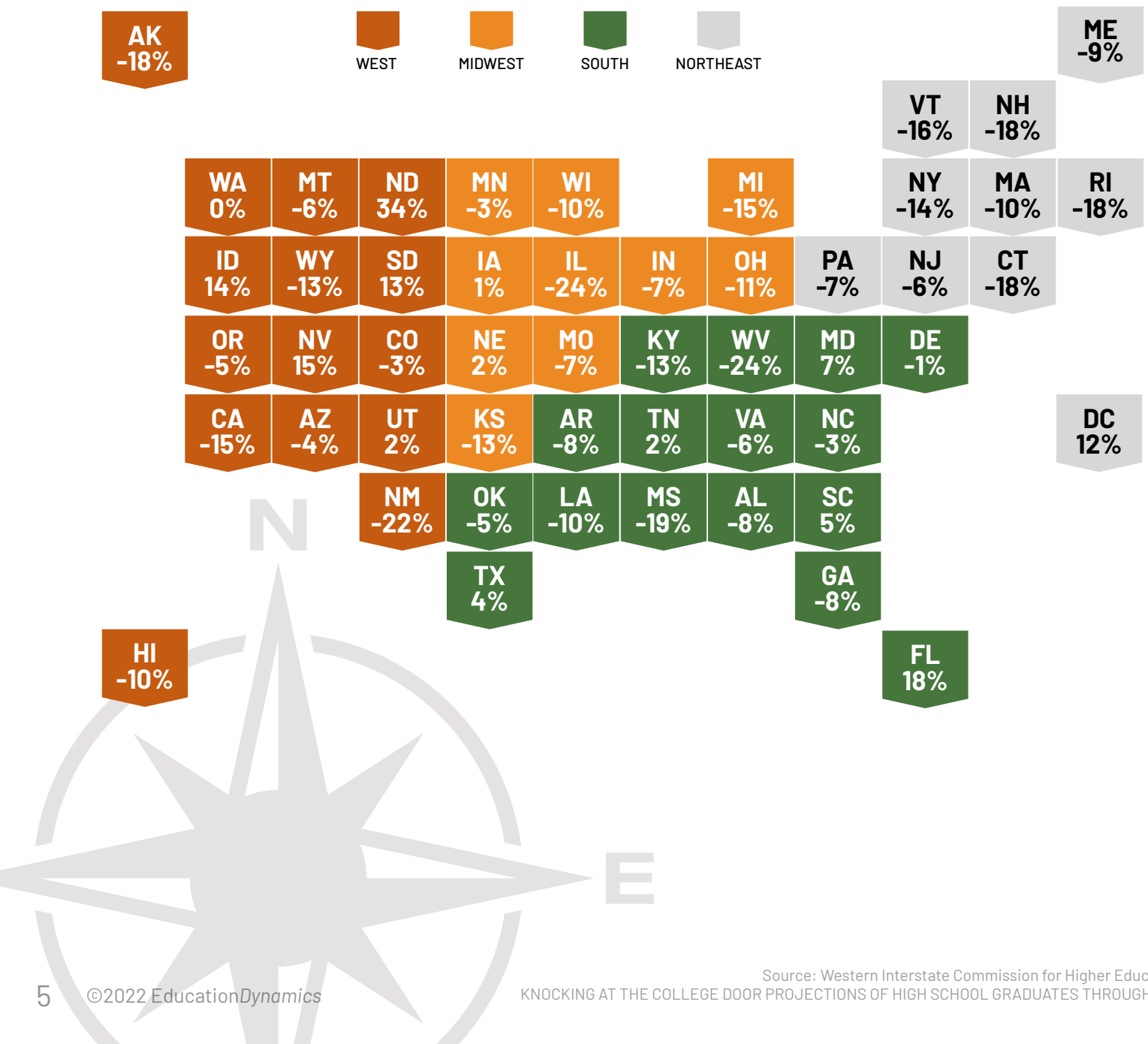


The current increase in high school graduates is not translating into college enrollments. The pandemic, along with other factors, has pushed more students to move directly into the workforce.

Impacts seem to vary by state

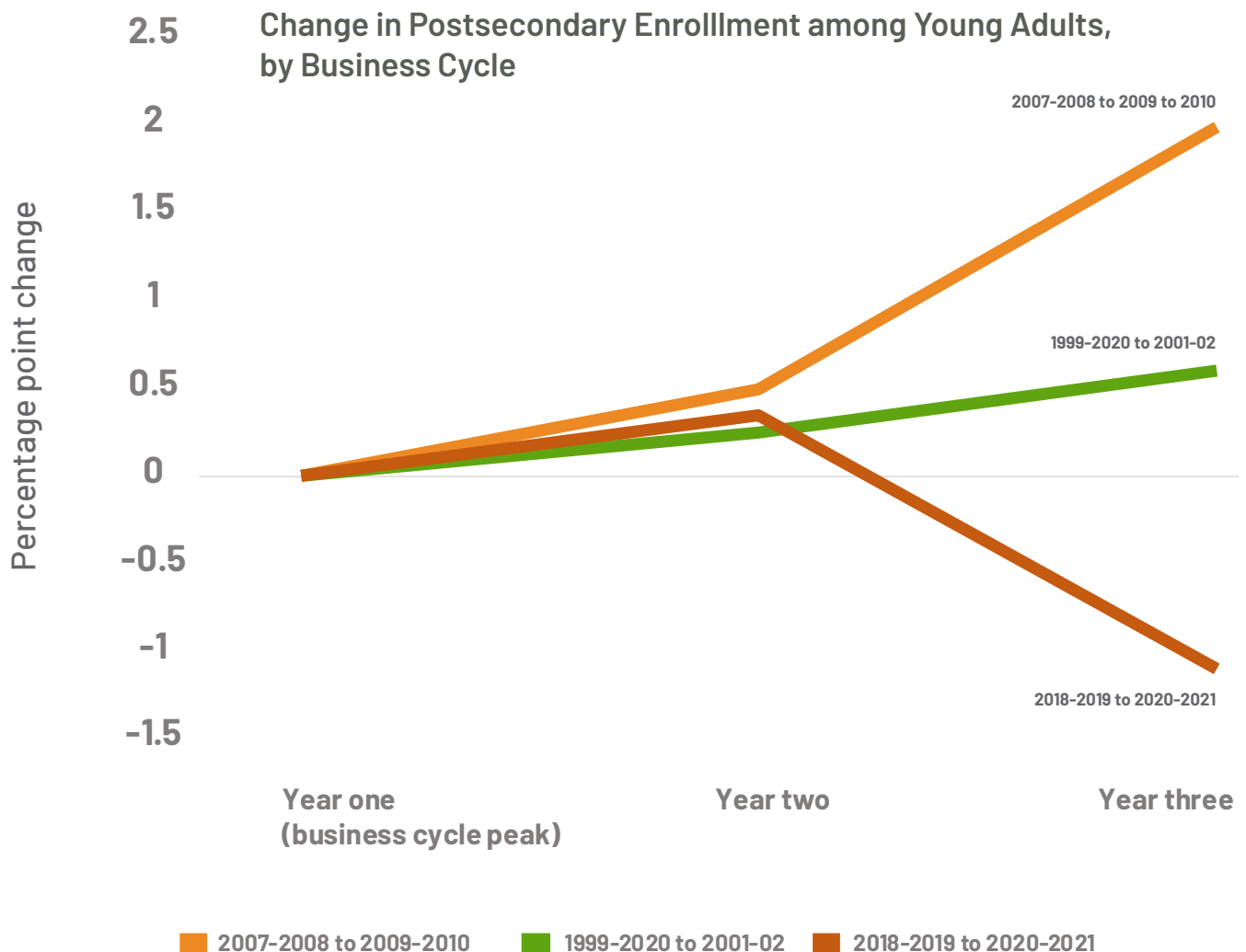
The impact of the pandemic has created uncertainty around high school graduation projections. This will likely impact the school enrollments unevenly, with some states experiencing a greater decline than others.

State-by-state projected percent change from class of 2019 to 2037, grand total of public and private schools

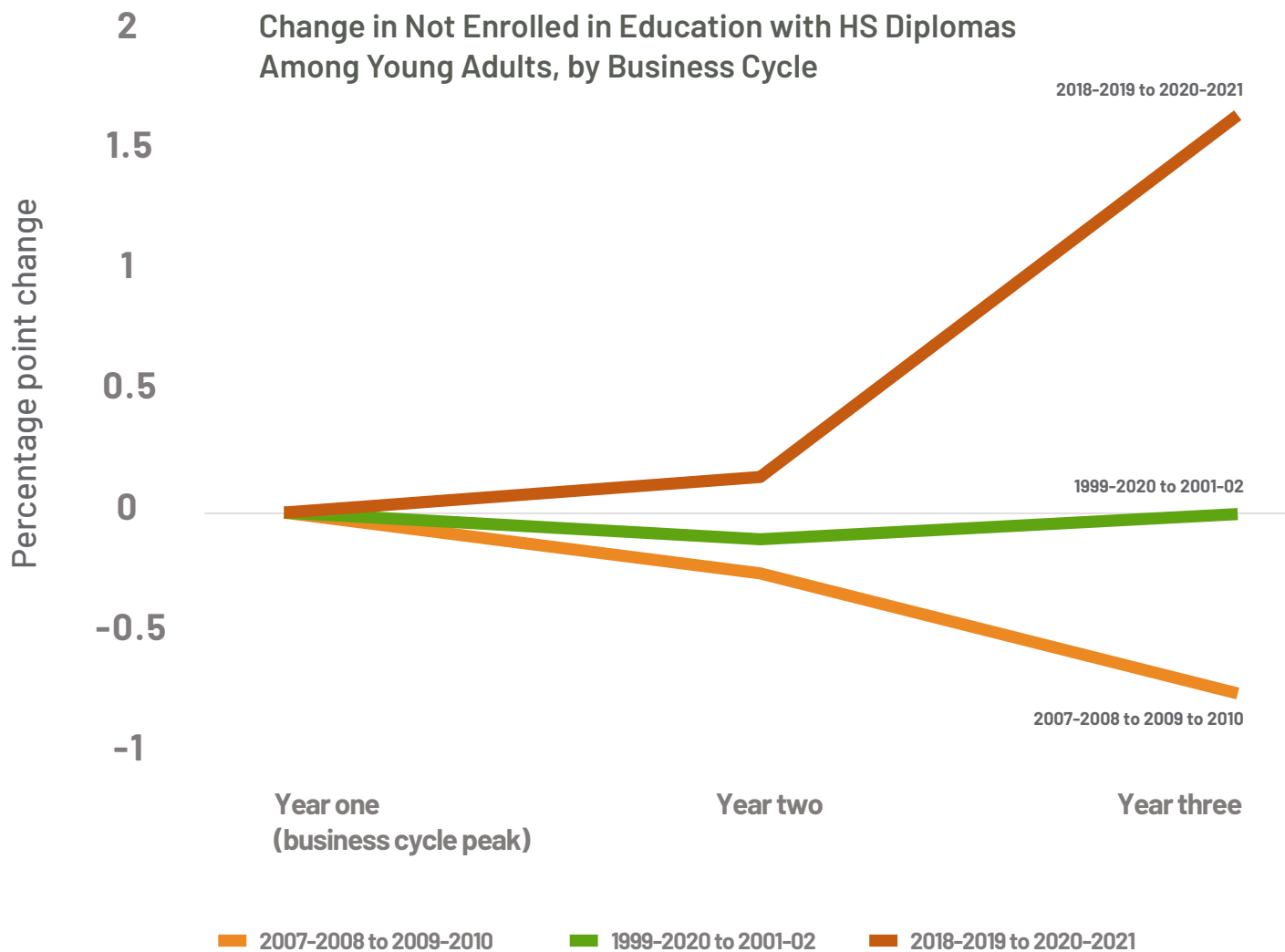


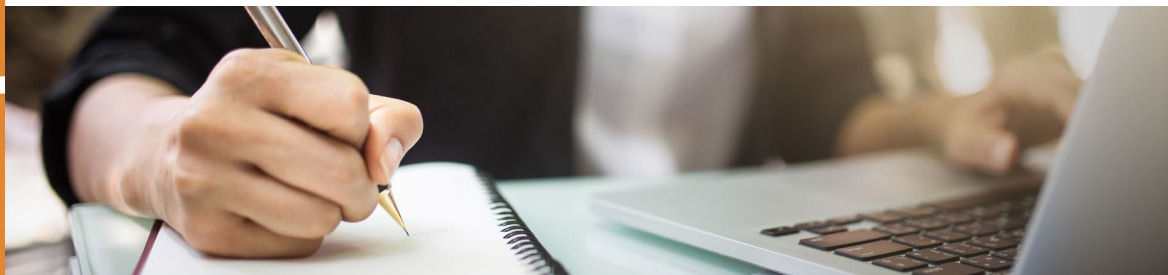
Increased number of graduates not translating into enrollments

Prospective students are behaving differently as a result of this recession. Since February 2020, the trends have indicated that young adults are spending less time with education and more time in the workforce. They've also experienced better wage outcomes compared to the 2001 and 2008 recessions.

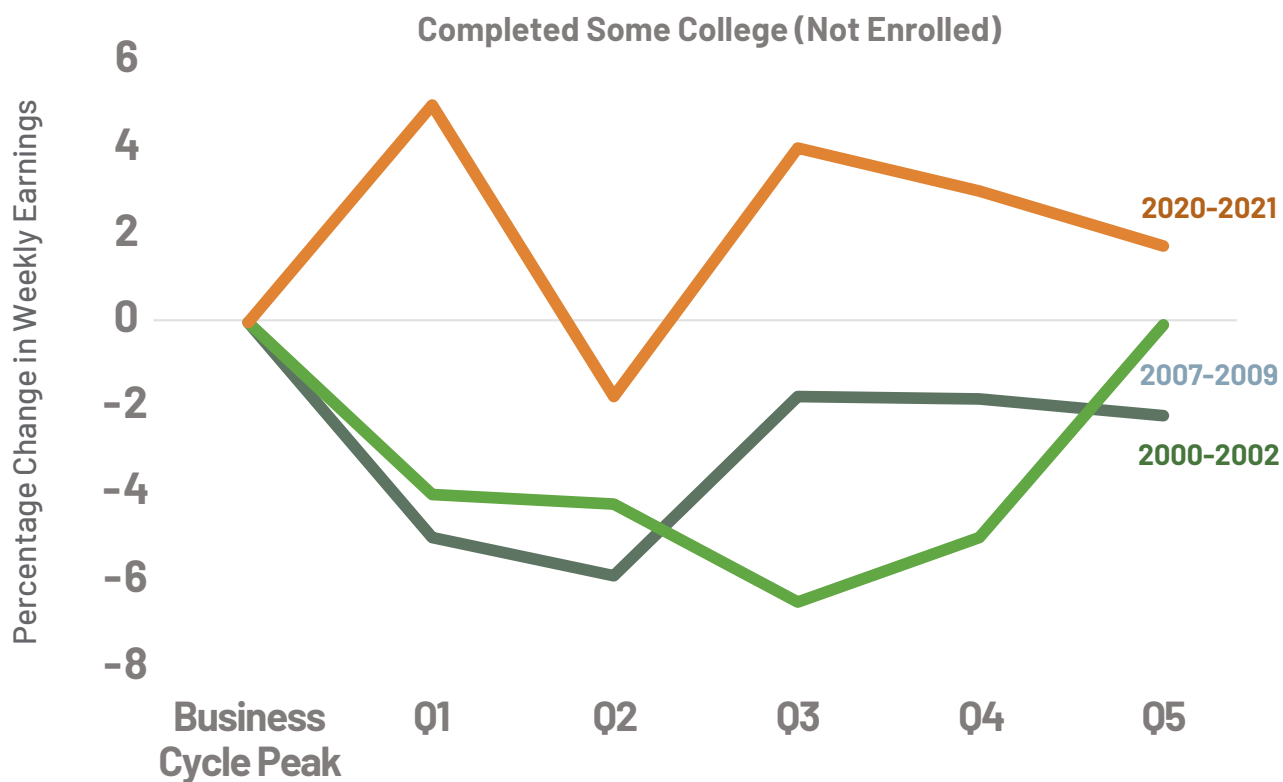


Partly a result of these outcomes, the increase in high school graduations has not translated into an increase in college enrollments.

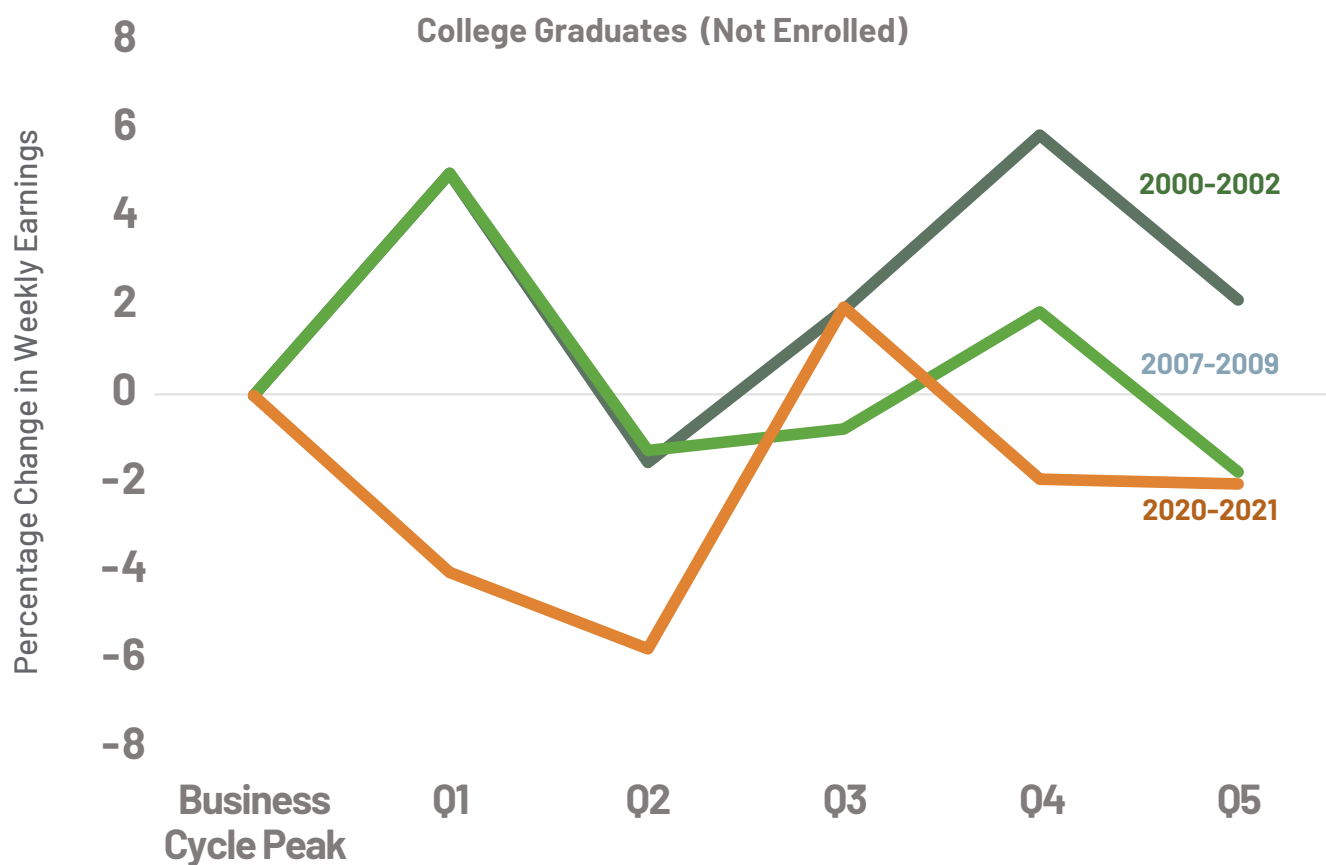




New high school graduates without a college degree have experienced a spike in employment accompanied by strong wage gains. Real hourly wages for high school graduates working full time have increased in the past two years. Young adults with some post-secondary education are also doing better in comparison to prior recessions - as the graph below illustrates. In contrast, recent college grads are experiencing similar compensation outcomes to what we saw in periods following the previous 2 recessions.



High school graduates seem to be aware of this trend. In the past year and a half, they have been more likely to enter the labor force rather than enrolling in higher education.



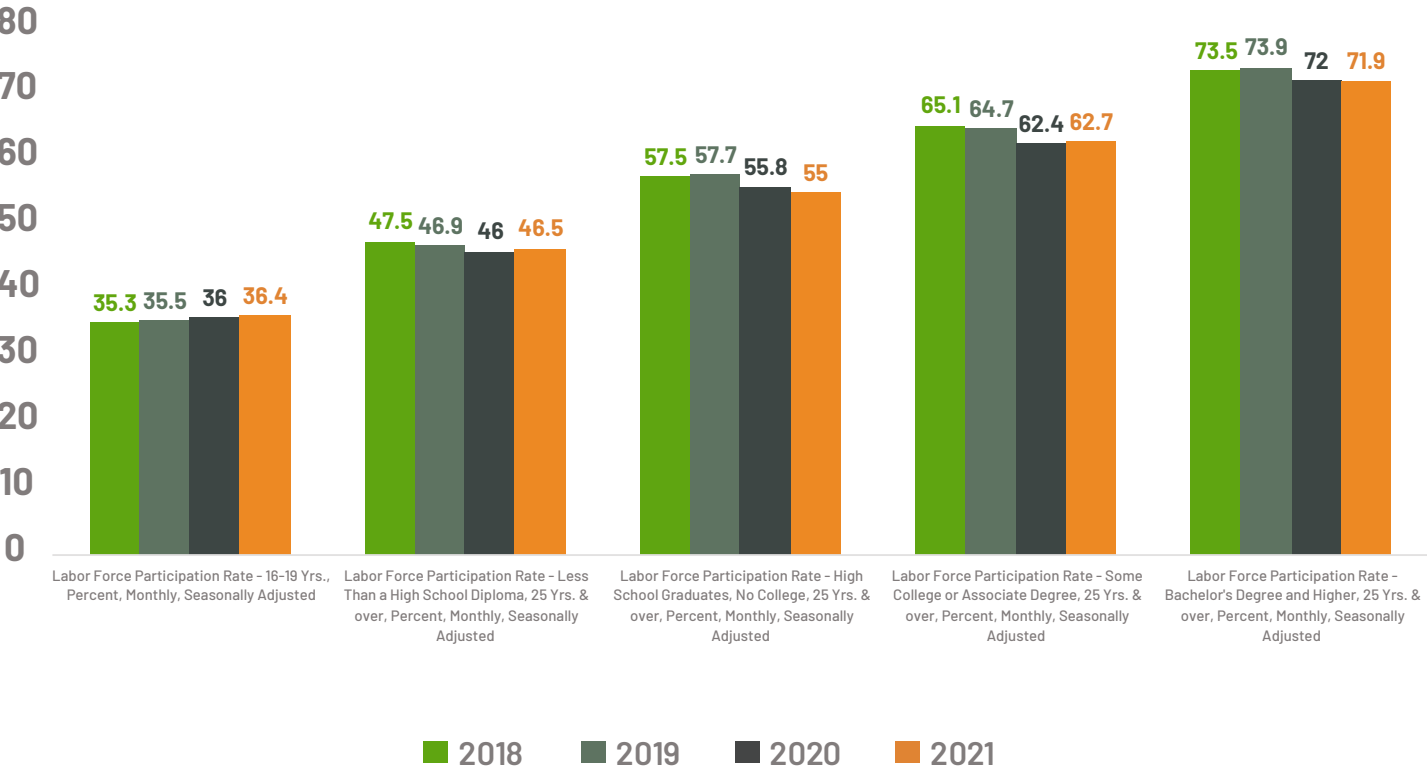
Source: <https://www.brookings.edu/blog/up-front/2021/10/14/has-covid-disrupted-the-postsecondary-pipeline/>





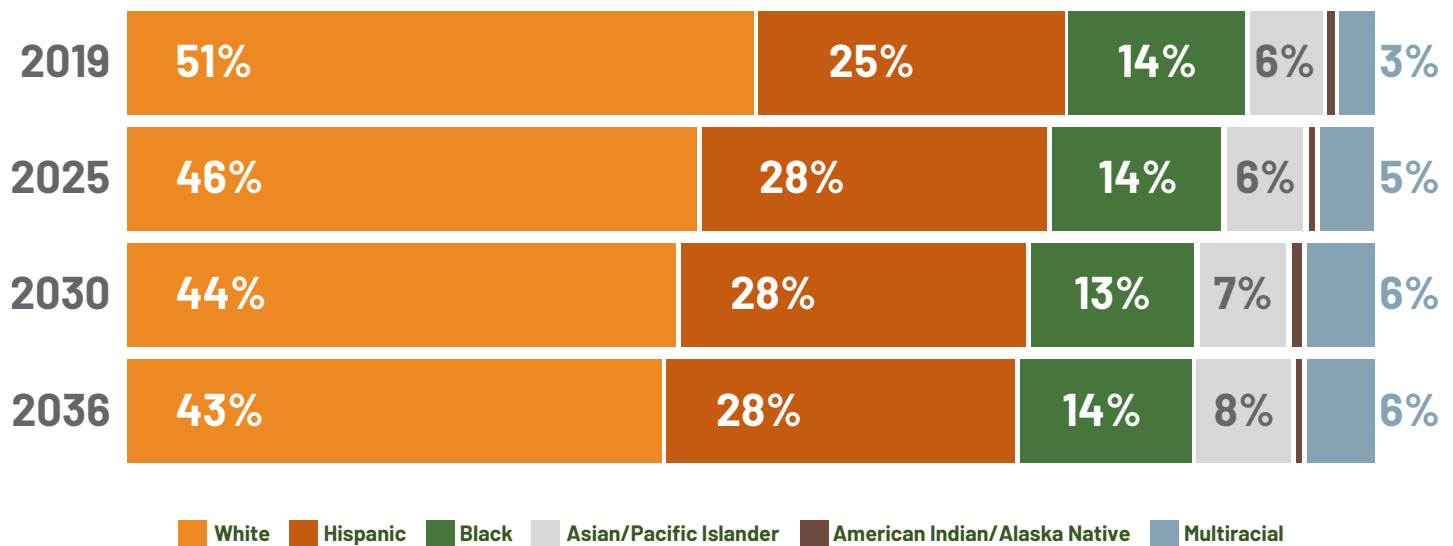
As illustrated in the graph below, October labor force participation rates have increased in 2021 for 3 pertinent categories: 16-19 years, those 25 and older with less than a high school diploma, and 25+ with some college or Associate degree.

In Percentages



More diversity in the graduating populations

Graduating high school populations are becoming more diverse, which means that the college students of the future are likely to be more diverse as well. Institutions may need to adjust services and programs to better meet the needs of these students.



Source: Western Interstate Commission for Higher Education, KNOCKING AT THE COLLEGE DOOR PROJECTIONS OF HIGH SCHOOL GRADUATES THROUGH 2037

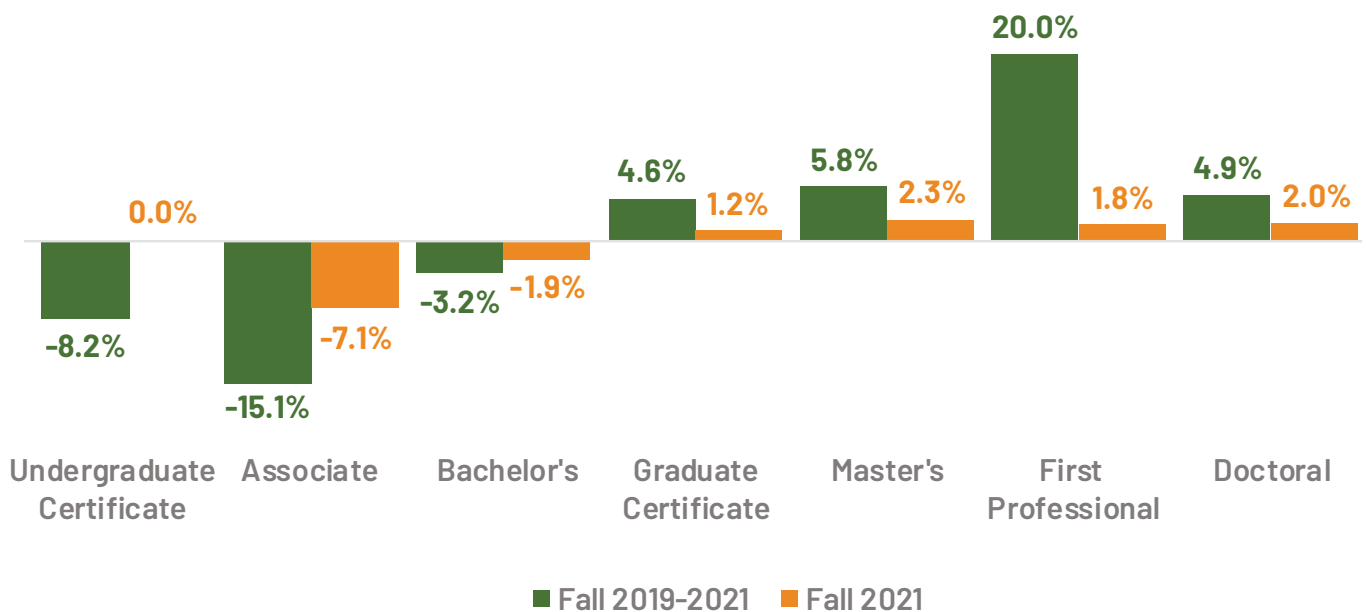
Institutions should focus on supporting their current students, improving retention and completion, and finding ways to reach the adult market.



State of enrollments – Fall 2021 enrollments were down again

Fall enrollments were down again. They were down 2.5% from the prior year, indicating no signs of recovery from last year's decline. In fact, over the past several years, undergraduate enrollments have fallen 7.8%.

When broken down by credential type, there is encouraging news. Enrollments grew among Graduate Certificates, Master's, First Professional and Doctoral programs.



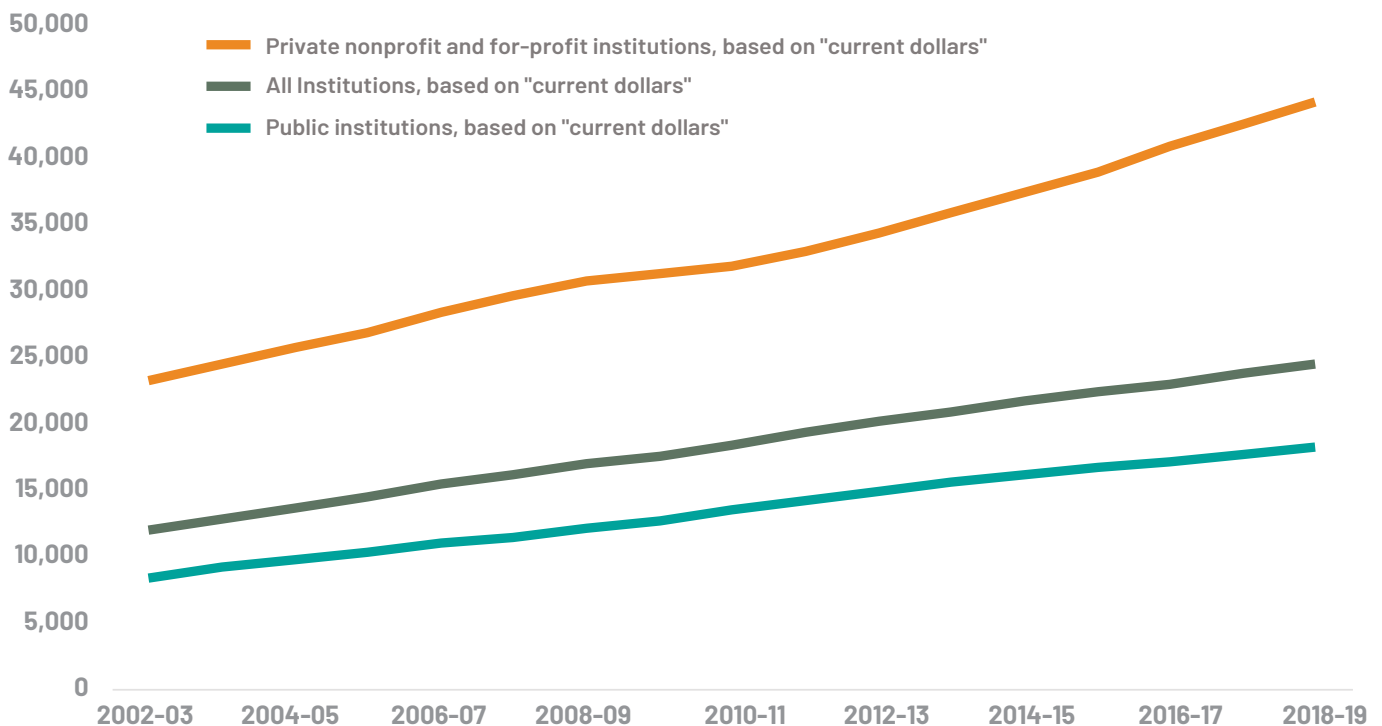
Source: National Student Clearinghouse preliminary data as of 11/19/21 (73.5% reported, representing 13.7 M Undergraduate + Graduate Students)



What's keeping students away? COST.

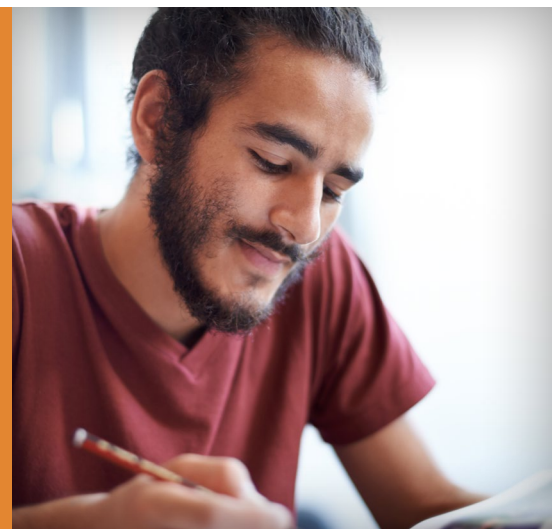
As stated by the Princeton Review, 98% of families say financial aid is necessary to pay for college and 82% cite it as “extremely” or “very necessary.” Yet the cost of college has continued to rise.

20-year average tuition among universities, 2002-2019



Based on the National Center for Education Statistics data, average tuition and fees continue to grow.

- Across all institutions, tuition has risen by 105% in the last 20 years.
- Public institutions have grown the most at 116%.
- Private nonprofit and for-profit institutions have seen increases of almost 90%.



Consolidations and full closures are underway

Consolidations are keeping some institutions afloat, but others are closing their doors completely. As federal stimulus funds fade, this trend may accelerate again.

Institution Type	2017-18	2018-19	2019-20	2020-21	1-Year % Change	3-Year % Change
All Institutions	6,642	6,281	6,145	6,063	-1.3	-8.7%
Public 4-year	760	788	791	773	-2.3	1.7%
Private nonprofit 4-year	1,643	1,630	1,621	1,608	-0.8	-2.1%
Private for-profit 4-year	499	369	352	343	-2.6	-31.3%
Public 2-year	978	963	946	920	-2.7	-5.9%
Private nonprofit 2-year	159	140	146	139	-4.8	-12.6%
Private for-profit 4-year	795	625	563	564	0.2	-29.1%
Public less-than-2-year	235	228	223	226	1.3	-3.8%
Private nonprofit less-than-2-year	76	60	59	59	0	-22.4%
Private for-profit less-than-2-year	1,497	1,478	1,444	1,431	0.9	-4.4%

Source: <https://www.insidehighered.com/news/2021/08/02/number-colleges-shrinks-again-including-publics-and-private-nonprofits>



SO WHAT'S NEXT?

Stopouts, student experience and retention

At least 36 million Americans have started but never finished college, the National Student Clearinghouse Research Center calculates. That's a market nearly 10 times bigger than the number of people who graduate from high school every year. Already, a quarter of undergraduates are 25 and older, the U.S. Department of Education reports.

"There's a huge opportunity to rethink what the college experience looks like for all types of students. We've tried to reimagine it for working adults."

Jeff Manassero, Executive Director, Rivet School

Meeting that opportunity will almost certainly require more stackable certificates and micro-credentials. Institutions should develop strategies for re-engaging with students who have stopped out from their programs and attracting those who left other institutions without completing their credential. These former students may be eager to improve their skills, increase their education level, and grow their salaries. It's up to colleges and universities to show them this is possible.

HOW TO ENGAGE STUDENTS WHERE THEY ARE

A strong, effective awareness strategy is vital to open lines of communication with those who are ready to consider a return to school. But slick and impersonal advertising won't do. The most effective messaging is much more sincere, relatable, and personalized.

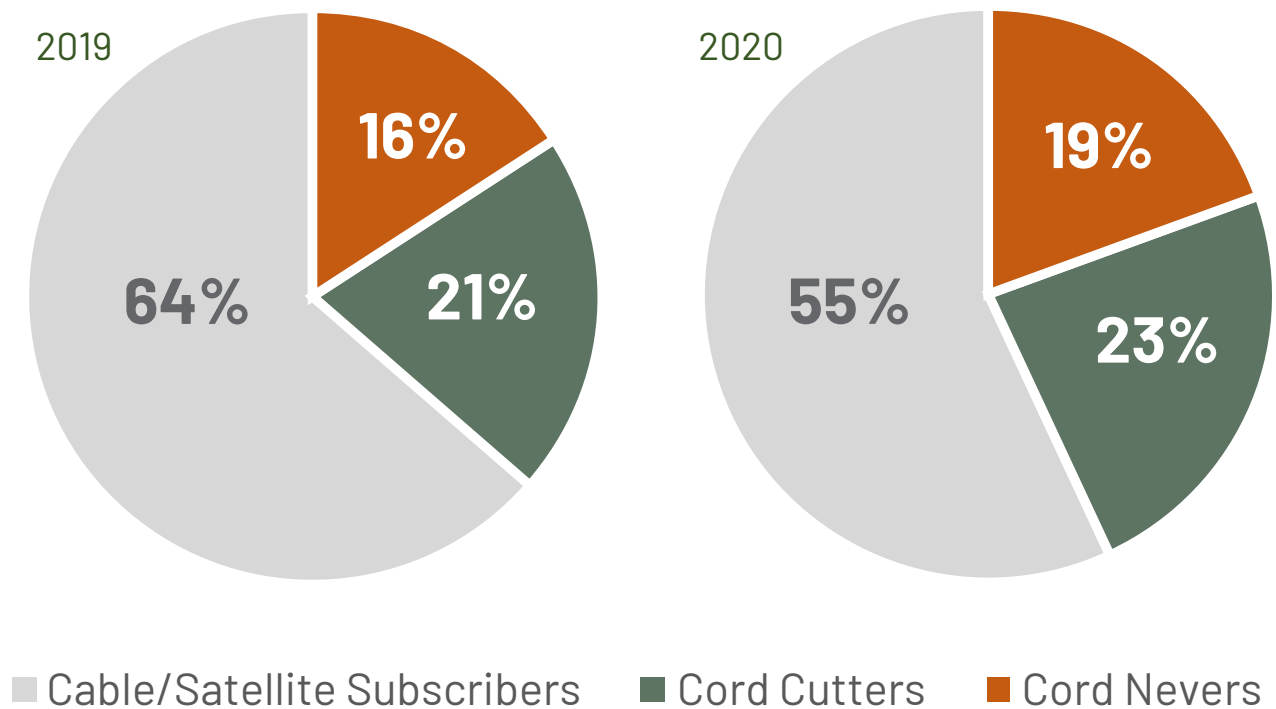
Campaigns focusing on your beautiful campus, or the college experience, don't speak to a growing portion of the student population. Instead, effective marketing shows how your program will impact their lives quickly and permanently.

Marketing should drive potential students to your website, where they can find answers to their questions. Prospective students are more discerning than ever before and savvy consumers capable of detecting authenticity in messaging. Many are doing extensive research and gathering information before making contact. Making sure they know about your program through thoughtful awareness campaigns is an essential first step.

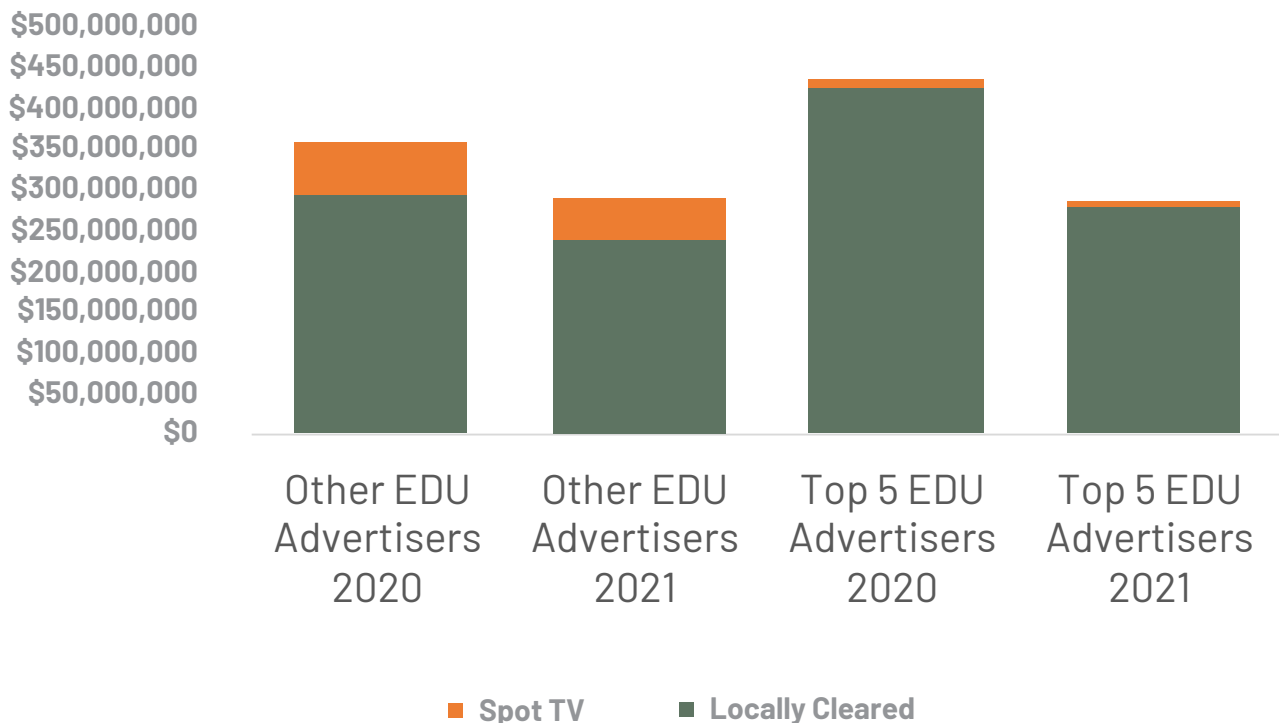


Over-the-Top Media

The growth of “cordless” households accelerated in 2020, and continues to grow in 2021. These households rely on streaming media or other internet sources for their entertainment instead of cable or satellite. Overall, more households are shifting to OTT.



Advertising spend on Linear television platforms took a major hit in 2021. It dropped a shocking 27%. The top five education advertisers spent 34% less overall. All other EDU advertisers also spent less, dropping 19%

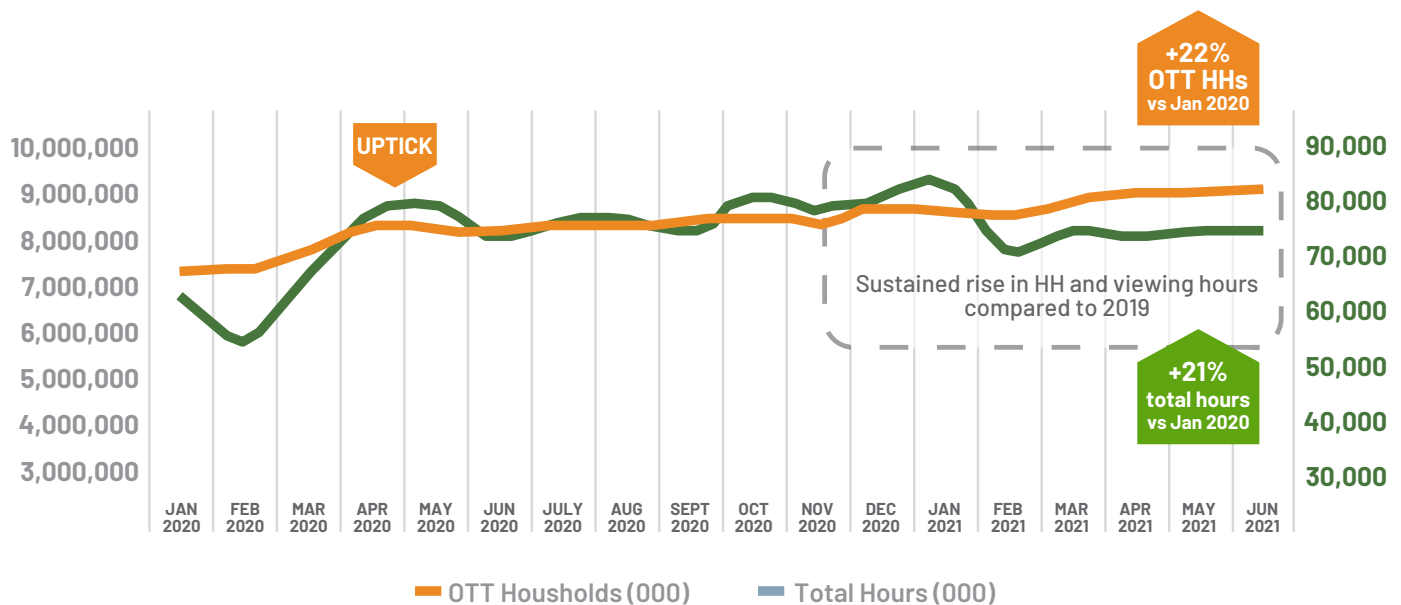


This aligns with the general move away from linear TV and into other advertising channels like OTT and digital marketing platforms.

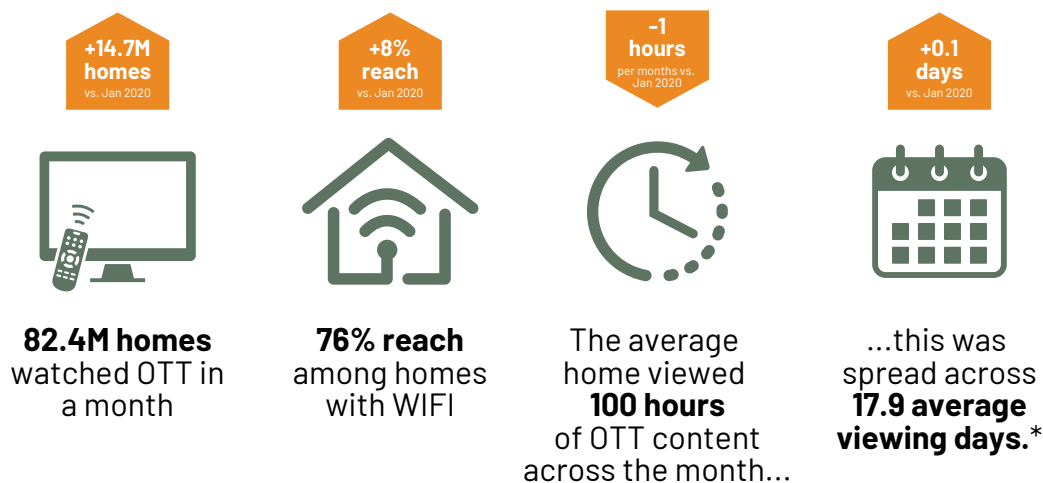


The pandemic has accelerated the adoption of OTT Consumption

The total number of OTT households increased 22% by January 2021 over January 2020. Over the same period, viewing hours increased 21%.



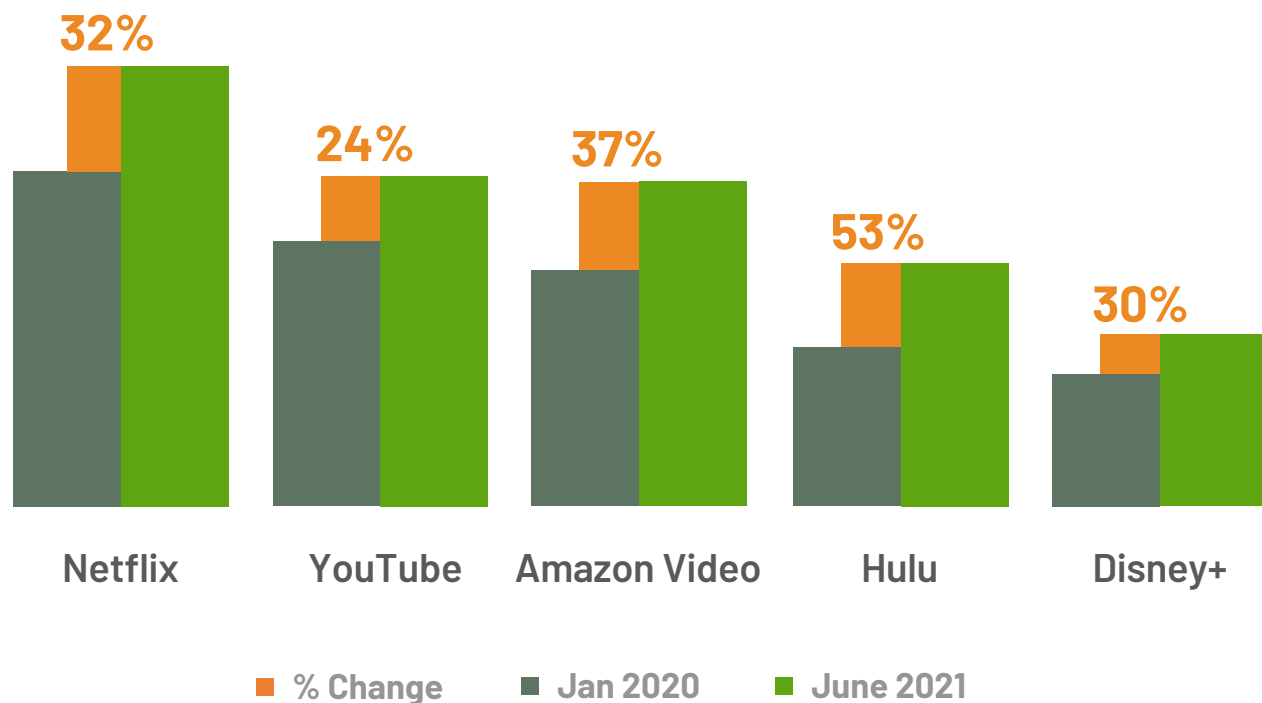
OTT content viewing has become a mainstream media behavior in the U.S. with 82.4 million homes watching OTT content.



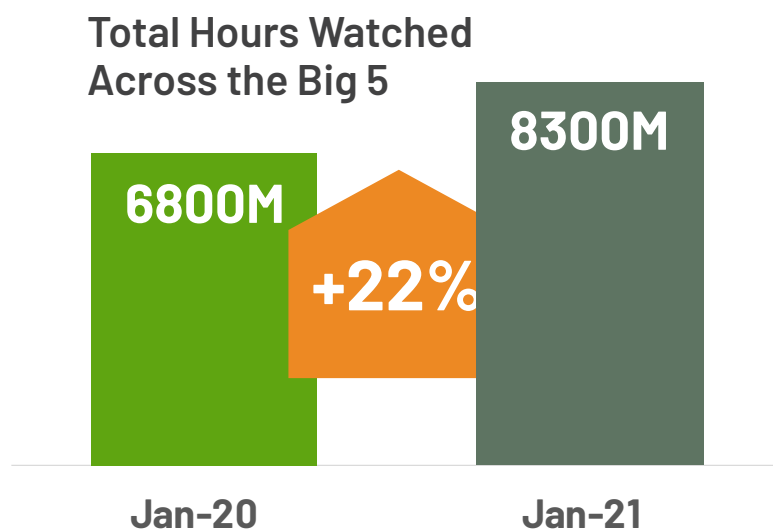
Source: Comscore OTT Intelligence, CTV Devices, U.S.

Source: Comscore OTT Intelligence, June 2021 minus Jan 2020, U.S. Note: absolute numbers (not percentage change) used above *Average viewing days: The average number of days in the month each household streams some content from each respective OTT service

Perhaps unsurprisingly, all of the biggest OTT players gained viewers during the pandemic.



Across the Big 5 OTT Players (Netflix, YouTube, Amazon Video, Hulu and Disney+), total hours watched increased by 22%, making those that do offer advertising opportunities an even more attractive prospect for education advertisers.



DIGITAL EVOLUTION

Privacy Comes Into Focus

The struggle between advertisers that rely on user data and platforms that want to give users more control over privacy heated up in 2021. Apple introduced a new feature with iOS 14 that forces apps to ask user permission before tracking them across the internet. Unsurprisingly, most users opted out of sharing their data. In response, Facebook scrambled to introduce a new protocol called Aggregated Event Measurement to align with the new data use requirements.

These changes don't just affect social media. Advertising across all platforms will need to change to meet a new set of data privacy expectations. Already, Google has announced a plan to start blocking cookies in the Chrome web browser sometime in 2023.

When you add these changes to General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA), it might seem like the deck is stacked against digital marketing. Yet positive results are still possible if organizations stay alert and are willing to test new strategies.

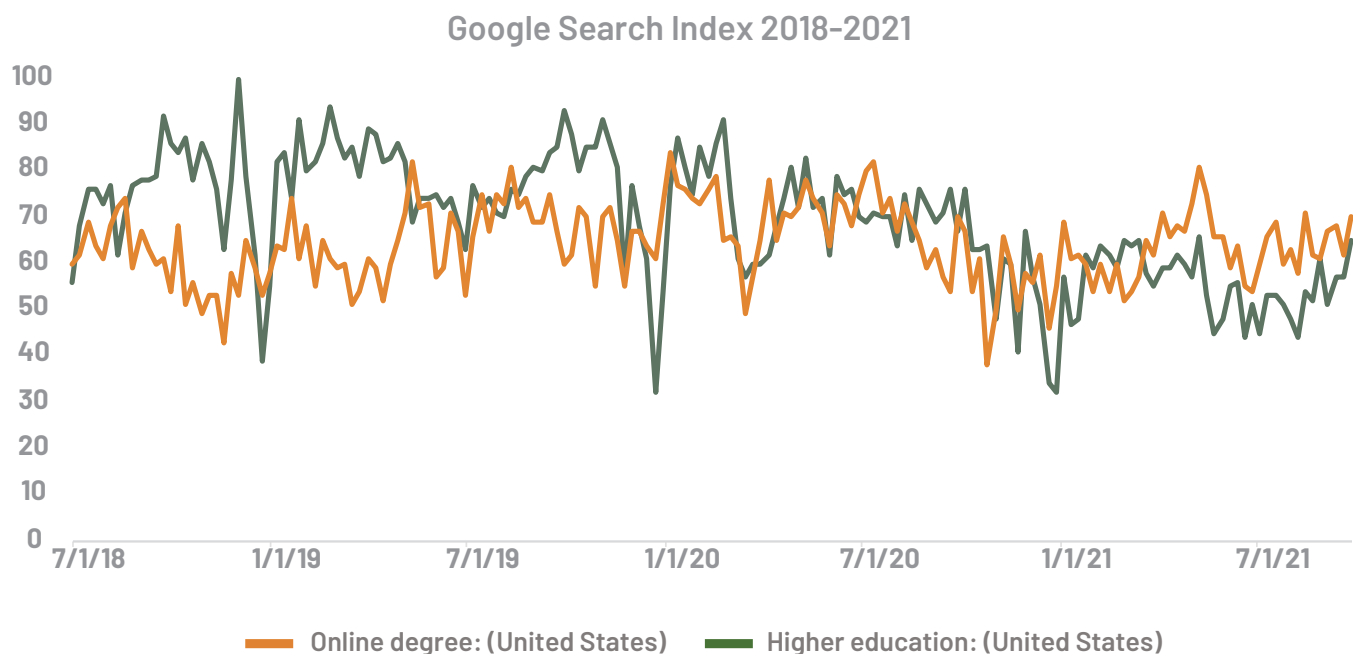


Digital can still get results

Year-Over-Year, EDDY partners are seeing more query growth and less expensive cost-per-click. Our quick pivot from broad match modified (BMM) to true broad has helped drive cost-per-inquiry improvements of about 15-17% for our partners compared to the rest of the industry. We break down the results below.

Online Degree Searches Continue to Outperform Overall Higher Education Searches

Higher Education-related search volume peaked in 2018 and remained strong through 2019. However, the topic showed a sharp decline in relative search volume beginning in 2020 and has not recovered, with volume further declining in 2021. In contrast, online degree-related searches have remained mostly consistent over the past three years, after accounting for seasonal variability.

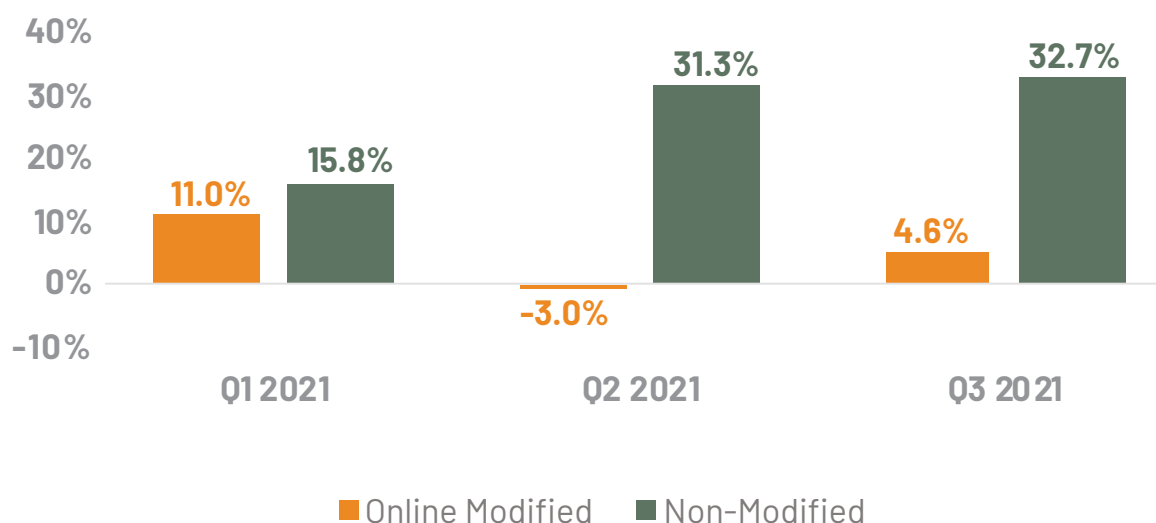


In Quarter 3 of 2021, relative search volume for online degree-related searches were trending positively and outperforming more general higher education-related searches relative to historic performance.

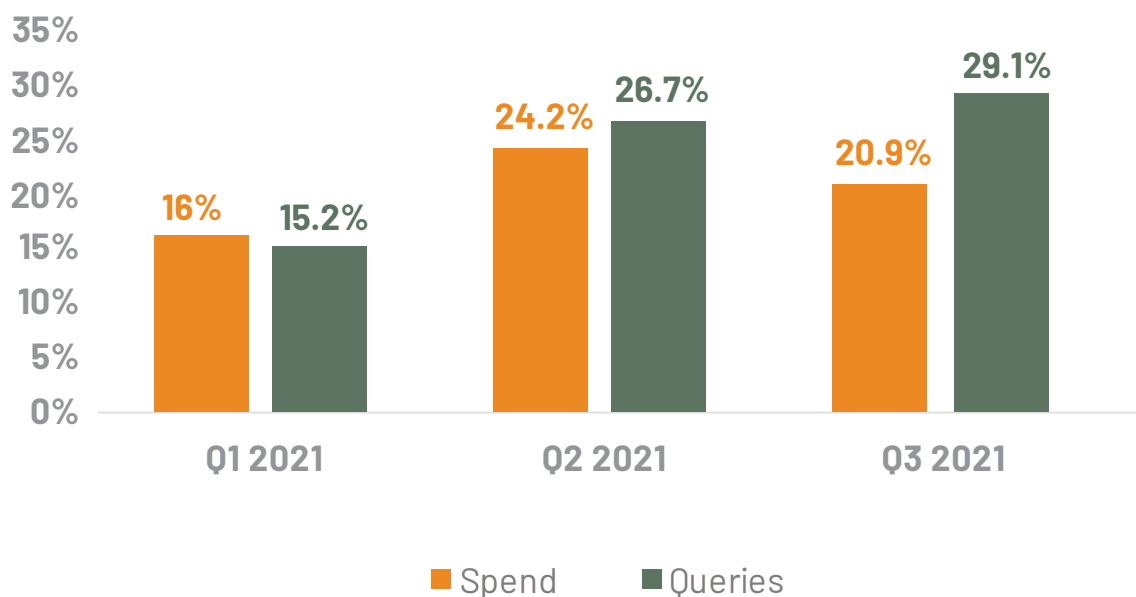
In contrast to these general trends, EDDY Partners are seeing substantially more growth in both non-modified and online-modified queries. They have seen queries grow 29% YoY in Q3. The majority of that growth is within non-modified terms which also makes up the majority of EDDY searches.

For EDDY Partners

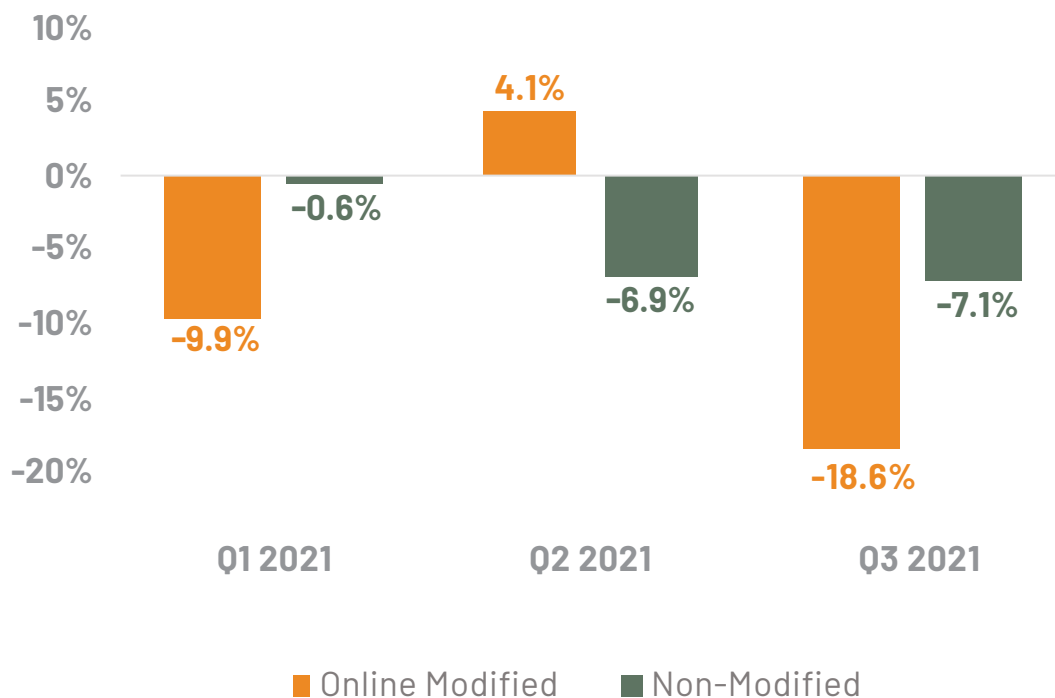
- Non-modified queries grew 33%
- Online-modified grew 5%



Queries grew at a faster rate than spend, due to more efficient CPCs.



EDDY CPCs have decreased 13% YoY overall, with improvements in both non-modified (-7%) and online-modified categories (-18%).



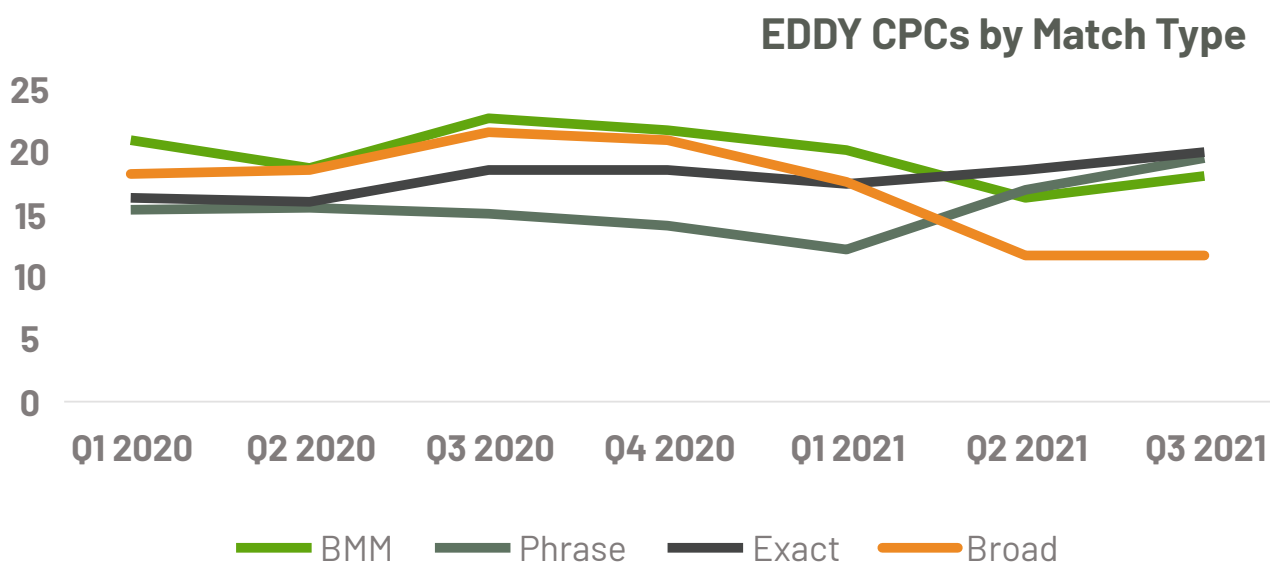
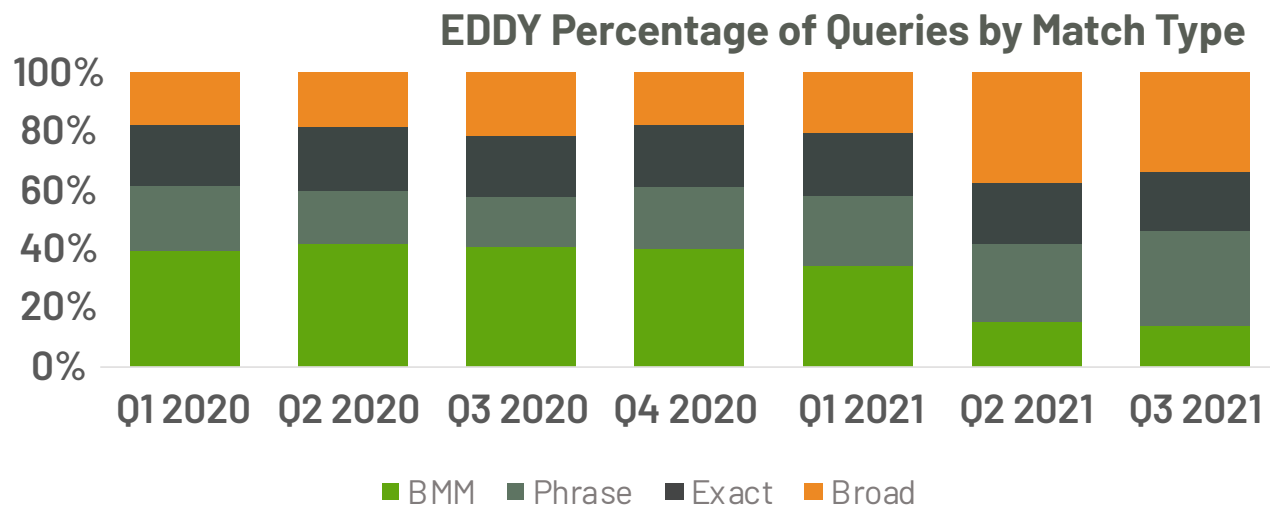
Source: EducationDynamics proprietary data 2021

Adopting a True Broad Match strategy

Our early adoption of true broad match keywords likely contributed to the decrease our partners have seen in CPCs. In Q1, Google announced that broad match modified (BMM) would be discontinued in favor of phrase matching. EDDY quickly pivoted from heavy reliance on BMM, replacing it with a strategy that employed both phrase and true broad match keywords.

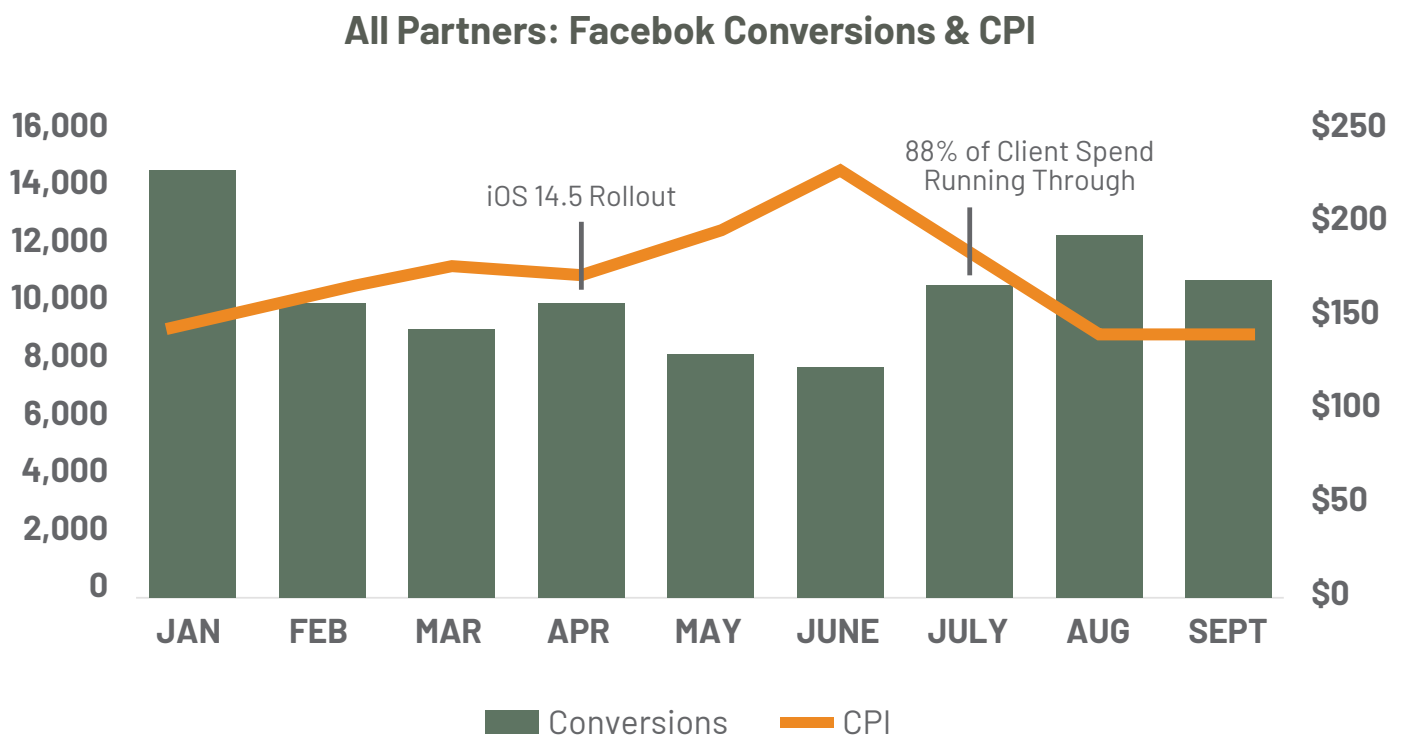
As spending has increased in broad match, CPCs have continued to decrease (-20% YoY in Q3). This is most likely due to increased true broad coverage on more generic terms.

As with any new shift, the down-funnel performance for true broad match remains to be seen. That, along with the rising CPCs for phrase match, is worth monitoring.



PAID SOCIAL

iOS 14.5 rolled out in April 2021, which allowed users to opt out of ad targeting. This reduced our ability to target ads and track users to conversion using standard cookie-based pixels.



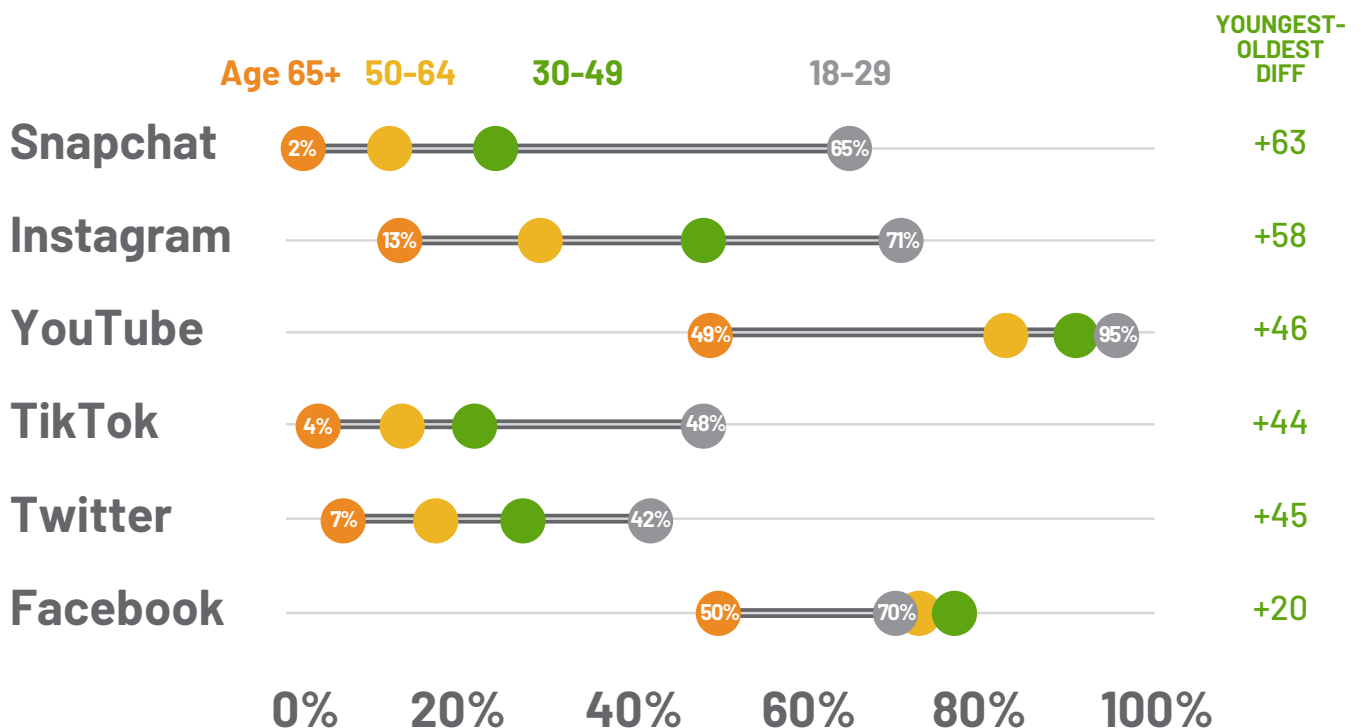
As we have settled into a new normal with iOS 14.5, interest + demographic-based targeting has proven to be a less effective conversion driver. We are starting to see the realization of the cookie-less future.

SOCIAL MEDIA - ORGANIC

Audience stratification has taken hold across social media platforms. Users tend to select preferred social media platforms based on a combination of their demographics and socio-graphics.

Age certainly impacts platform choice. For example, only 4% of people age 65+ use TikTok, while 48% of 18-29 year olds are on the platform. Snapchat and Instagram show the largest gap.

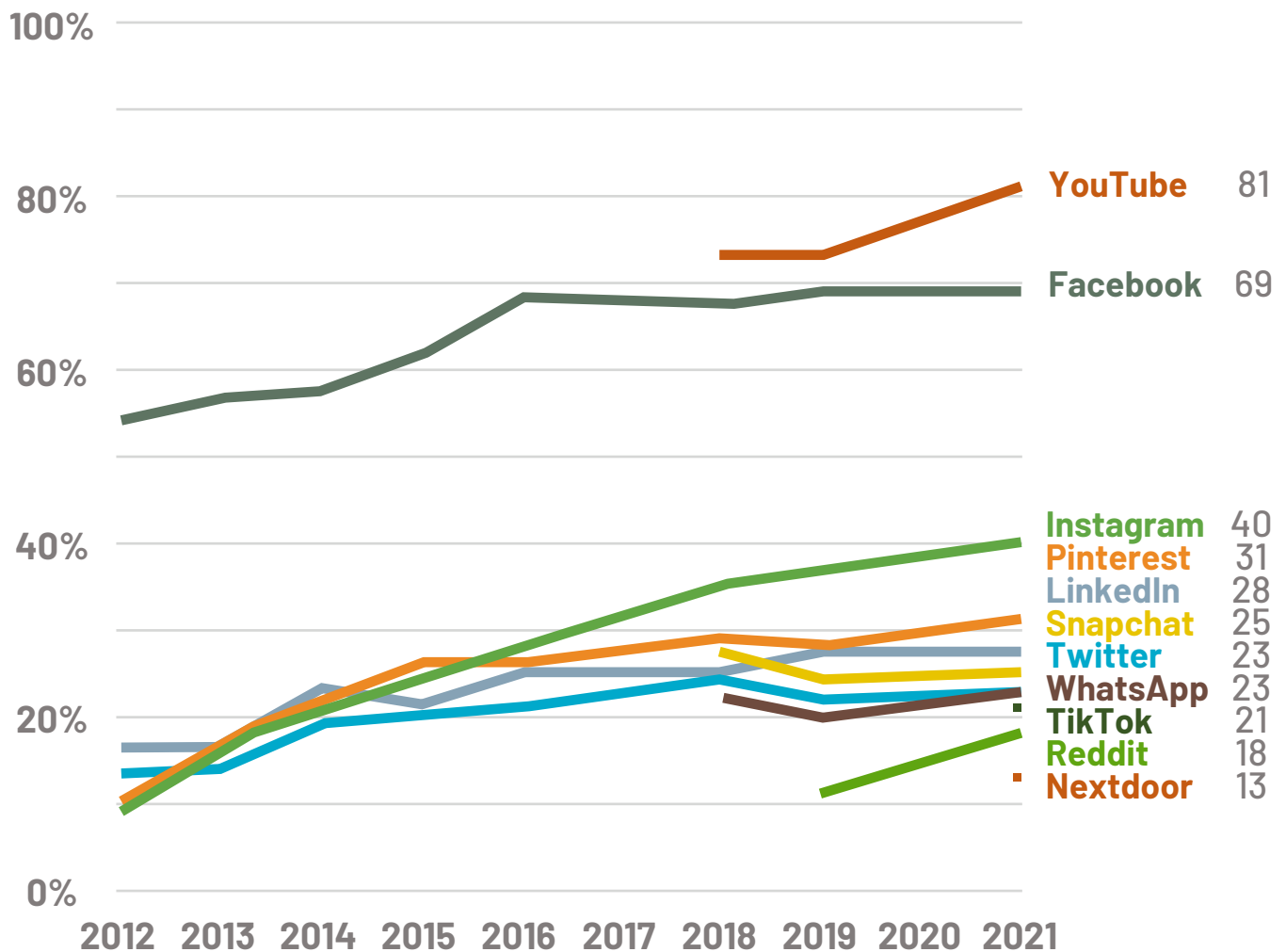
Percent of U.S. adults in each age group who say they use ...



Note: All differences shown in DIFF column are statistically significant. The DIFF values shown are based on subtracting the rounded values in the chart. Respondents who did not give an answer are not shown.

The amount of time spent on social media grew by 13 minutes in 2020, averaging about 1 hour 35 minutes per day. eMarketer projects that time spent on social in 2021 will increase by about 6.5 minutes.

Percent of U.S. adults who say they use ...



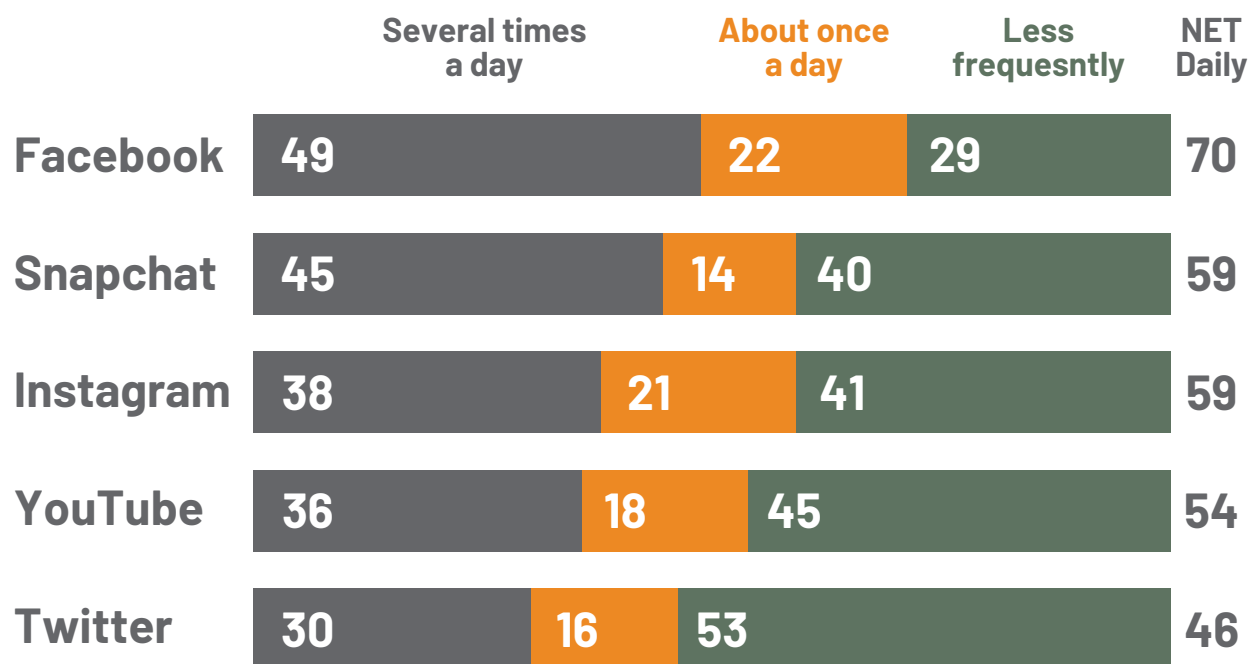
Note: Respondents who did not give an answer are not shown. Pre-2018 telephone poll data is not available for YouTube, Snapchat and WhatsApp; pre 2019 telephone poll data is not available for Reditt. Pre-2021 telephone poll data is not available for TikTok. Trend data is not available for Nextdoor.

In 2021, TikTok and Reddit show the most significant growth.

	2020	2021
TikTok	87.1%	18.3%
Reddit	25.9%	14.4%
Pinterest	7.8%	3.1%
LinkedIn	6.3%	4.2%
Instagram	6.2%	3.7%
Snapchat	4.0%	2.6%
Twitter	4.0%	0.2%
Facebook	3.3%	0.8%

Many users visit their favorite platforms daily. Facebook, Snapchat and Instagram users are particularly active, some visiting several times per day.

Among U.S. adults who say they use _____, % who use that site ...

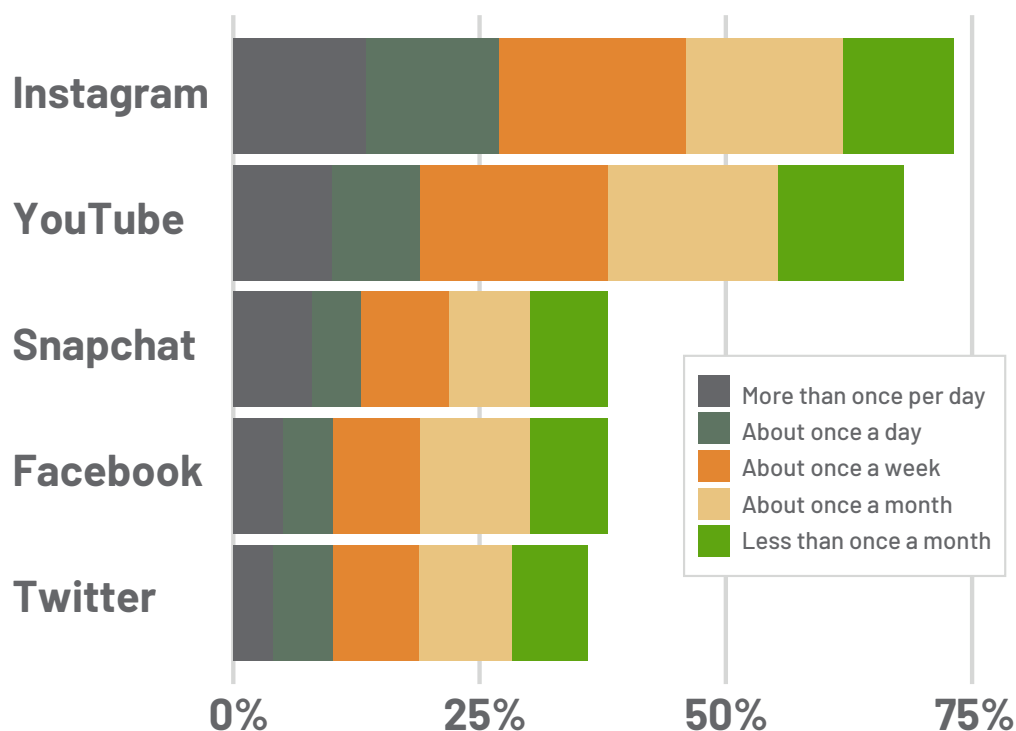


Note: Respondents who did not give an answer are not shown. "Less frequently" category includes users who visit these sites a few times a week, every few weeks or less often.

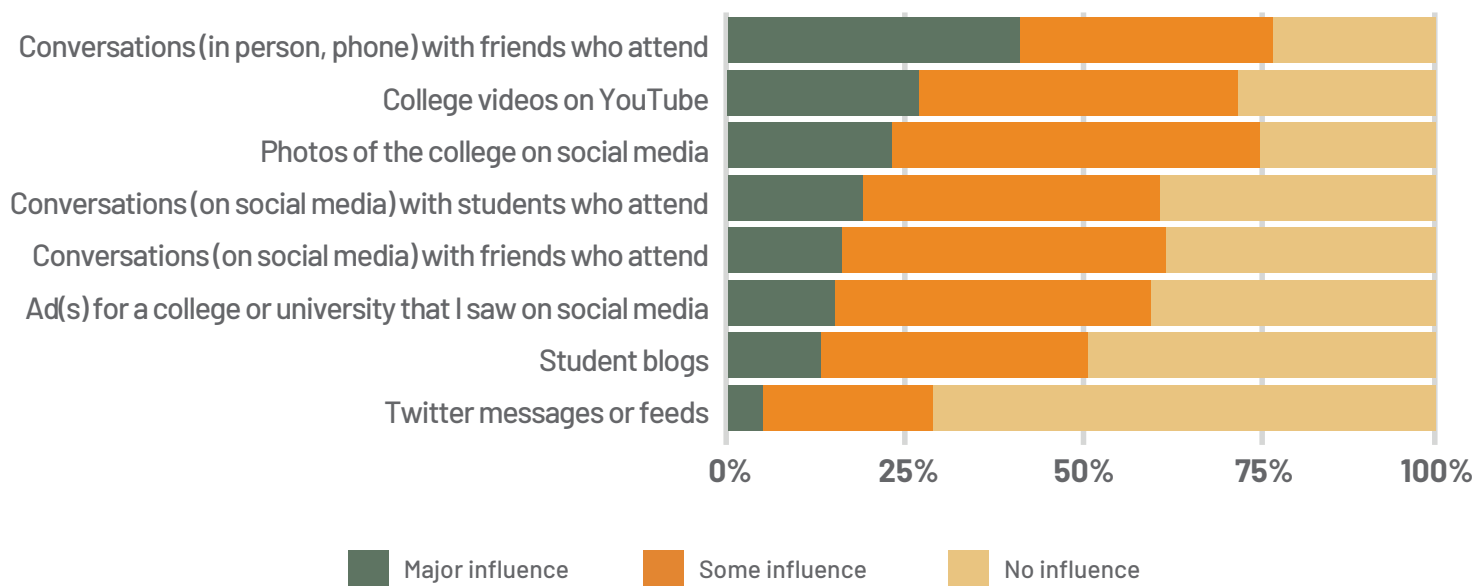
Source: Survey of U.S. adults conducted Jan. 25-Feb. 8, 2021.

"Social Media Use in 2021"

Teens often use social media to research colleges and universities. Frequency is highest across Instagram and YouTube.

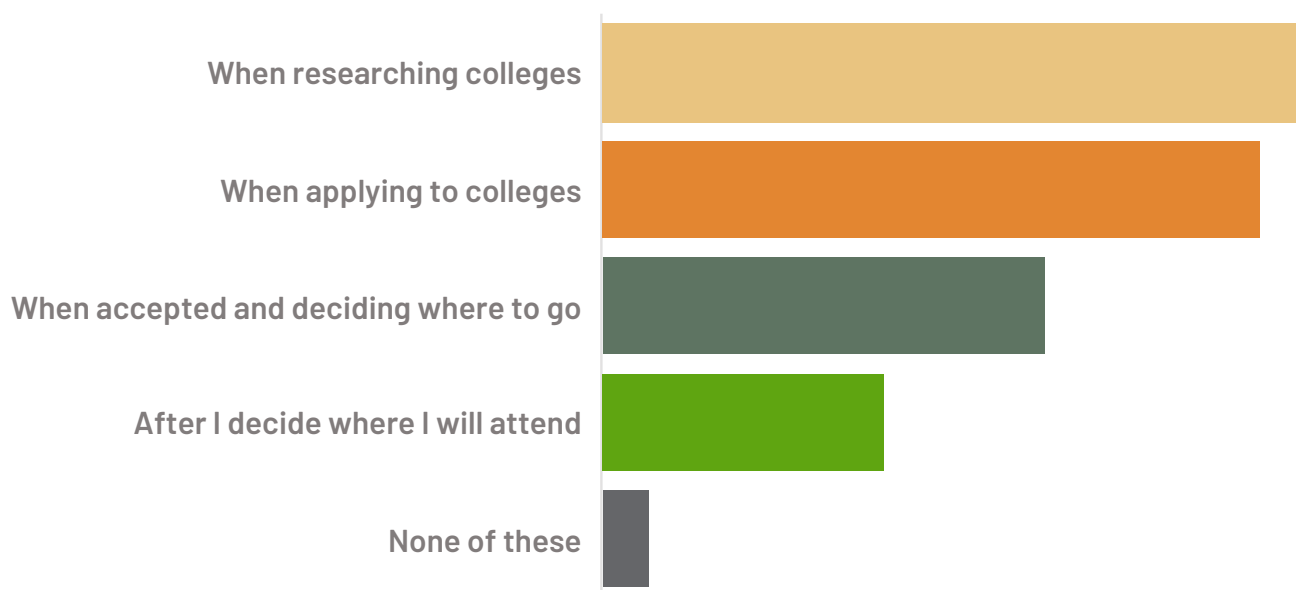


But this isn't necessarily the most influential source in their enrollment decisions.

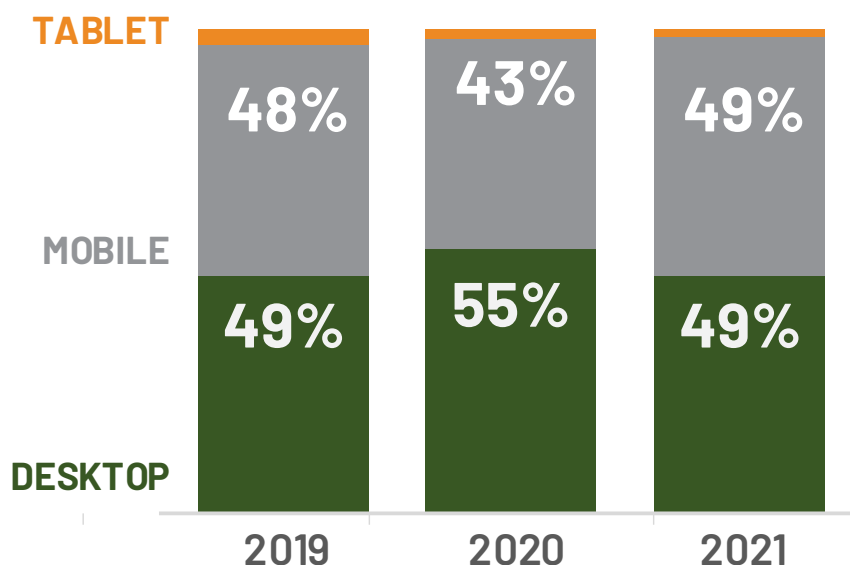


YOUR WEBSITE: THE HUB OF YOUR BRAND

Websites are even more critical to college search than social media. They remain a prevalent force across the states of search and enrollment.



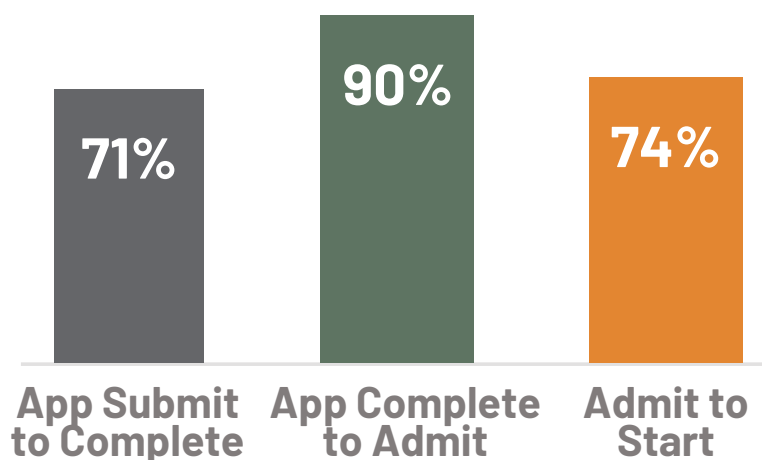
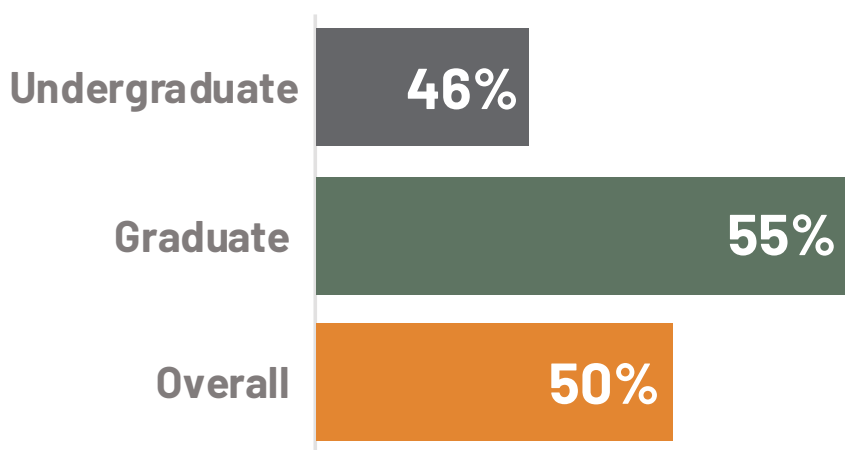
While mobile optimization is critical, the pandemic drove an interesting shift to more desktop searches in 2020. In 2021, those levels rebalanced to the near-even split we saw in 2019.



EFFECTIVE ENROLLMENT MANAGEMENT

Contact rates>higher for Graduate programs

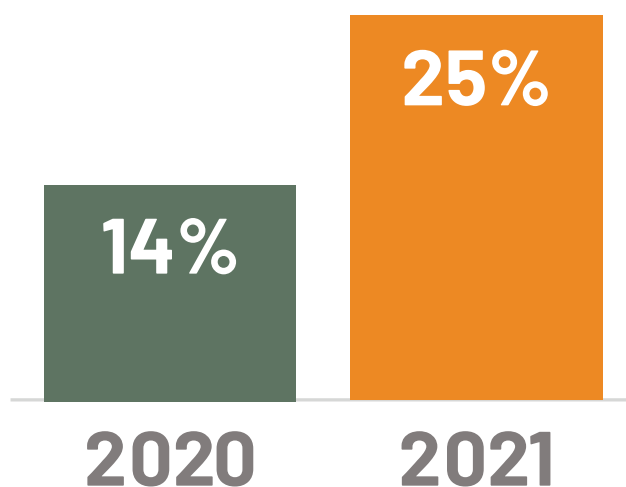
Average contact rates this year were about 50%, with Graduate slightly higher at 55% and undergraduate slightly lower at 46%. Continued adjustments to dialing cadence, SMS and SPAM mitigation all helped contribute to improved year-over-year contact rates and lead to application rates.



Nurturing with personalization

Personalization was a major focus in 2021. This resulted in much higher Click-to-Action Rates for SMS and increased conversion rates.

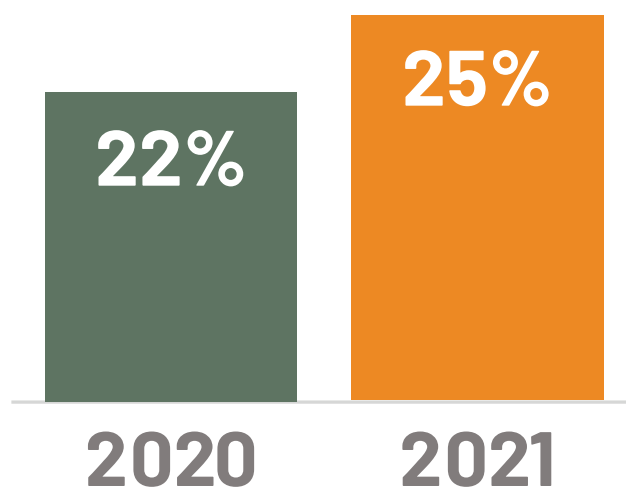
SMS Click-to-Action Rates



Multi-channel success

We also saw success for clients who chose to use a multi-channel approach. Their contact rates increased by 3 percentage points over the previous year.

Multi-channel approach



2022 RECOMMENDATIONS AND LOOKING FORWARD:

The events of 2020 accelerated developing trends in higher education, but 2021 solidified them. The pace of growth in online and non-traditional programs has been accelerated and will continue to grow in importance over the coming years. To compete and survive in today's crowded higher ed landscape, institutions need to serve the non-traditional student with programs that deliver flexibility, fit into their lifestyle, and help them achieve their personal and professional objectives. But, offering flexible and online programs is not going to be enough.

The institutions that succeed in 2022 and beyond will be those that build a strong connection between their brand and its promise. Successful institutions will nurture students from awareness through graduation and support non-traditional students as they balance work, education, and other competing priorities.

In 2022, we recommend institution focus on the following areas to create a more durable foundation for the school and tomorrow's learners:

- Understand the non-traditional student, their challenges, values and how their behaviors impact their enrollment decisions.
- Invest in your brand and building brand awareness with messaging that is aligned with your stated and delivered brand promise.
- Communicate your value clearly through your website and related digital platforms. Today's students conduct significant research prior to first contact.
- Stay on top of emerging trends and changes to marketing platforms and technology. The constant evolution of technology and its users mean your strategies must also evolve to keep your message in front of your audience.
- Engage students across multiple modalities, including email, phone and SMS, and do so consistently throughout the student lifecycle – from consideration to graduation.

Although much has changed, the core of effective enrollment strategy remains the same – colleges and universities must meet students where they are. This is particularly true as the definition of a modern student shifts. With a willingness to listen to student needs, and a commitment to multi-channel engagement, institutions can thrive and grow by owning the student life cycle and serving students on their academic journey.

GROW YOUR ENROLLMENTS IN 2022

At EducationDynamics we continuously monitor the post traditional enrollment management landscape. By evaluating external forces, monitoring marketing and student engagement trends, and speaking with current and prospective students, we gain unmatched insights into the student journey. Our full suite of services and solutions touch the entire student lifecycle, from inquiry generation to enrollment management, marketing, branding, contact center services, and more. We give our college and university clients the flexibility to talk to prospective students where they live, moving them smoothly through the engagement funnel from the first point of contact to graduation.

Ready to grow your enrollments? Speak with the experts that understand the student journey from consideration to graduation.

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