



# Marketing and Enrollment Management Benchmarks 2023

**Trends in Higher Education Marketing  
and Student Engagement**

# Introduction

The only certainty in the current higher education environment is that transition and change are our constant companions. The transformation of higher education may not yet be complete, but the direction is clear – even if the final destination is yet unknown. We have entered an era of flexible, student-centered education that provides even greater value for the students we serve.

Lifestyles have shifted. Flexibility and choice are at the center of every interaction from media consumption to work to education and beyond. A shrinking population, provided with more choices and more data upon which to make that choice, is demanding – and choosing – the solutions that best fit their individual needs.

Forward-thinking colleges and universities are adapting to our new environment and rethinking their approach to everything from credentials to marketing and student engagement. We now see a true embrace of alternative credentials and online programs. To reach students where they are, the institutions that are rising to the top 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 modern student. There are as many paths to success as there are individual students. Together, we'll help these students achieve their academic, professional and personal goals.



# Students Demand, and Have, Options

The makeup of student populations has shifted. Further, the definition of “online” and “non-traditional” student has shifted. Indeed, it is past time that we recognize these individuals for what they are. Simply put, they are students, without classification or qualifiers.

While the average student overall has become older, those participating in online and non-traditional programs are becoming younger. We have experienced the completion of the blurring of lines where traditional and non-traditional is about the path chosen rather than a student’s age.

Why are more students gravitating to non-traditional paths? Because they can. Students are choosing the path that best helps them meet their goals and achieve their ambitions. Online programs allow these students to study when and where they desire.

At the same time, more individuals than ever before are now classified as “Some College, No Credential.” These individuals stepped away from higher education for a variety of personal, financial, health, or pandemic-driven reasons. But, this troubling trend also presents an opportunity for the schools able to help students overcome these obstacles and re-enter paths to higher education.

Those schools that best understand today’s modern students are best positioned to serve those students with flexible options that address their demands and preferences. However, offering flexibility alone isn’t going to win the day. The schools that thrive and grow in a challenging environment will be those that best engage students and communicate their values with messages that resonate.

# 2022 Fall Enrollment Data

## National Student Clearinghouse Fall 2022 Data – Preliminary October Release

While undergraduate enrollment fell from Fall 2021 to 2022 (by about one percent), this erosion is lower than the erosion seen from 2020 to 2021. Female undergraduate enrollment declines were the largest contributing factor in the decline from 2021 to 2022.



	Fall 2021 % Change from 2020	Fall 2022 % Change from 2021	Fall 2020 - Fall 2022 % Change from 2020
<b>MEN</b>	<b>-3.0%</b>	<b>-0.7%</b>	<b>-3.8%</b>
<b>WOMEN</b>	<b>-3.5%</b>	<b>-2.1%</b>	<b>-5.6%</b>
<b>GRAND TOTAL</b>	<b>-3.1%</b>	<b>-1.1%</b>	<b>-4.2%</b>

Source: National Student Clearinghouse Fall 2022





Erosion was seen across all sectors at the undergraduate level. It is important to note the substantial improvement within the public 2-year institution sector from 2021 to 2022.

	Fall 2021 % Change from 2020	Fall 2022 % Change from 2021
<b>PUBLIC 4YR</b>	<b>-2.7%</b>	<b>-1.6%</b>
<b>PRIVATE NONPROFIT 4YR</b>	<b>-0.2%</b>	<b>-0.9%</b>
<b>PRIVATE FOR-PROFIT 4YR</b>	<b>-4.4%</b>	<b>-2.5%</b>
<b>PUBLIC 2YR</b>	<b>-5.0%</b>	<b>-0.4%</b>
<b>GRAND TOTAL</b>	<b>-3.1%</b>	<b>-1.1%</b>

Source: National Student Clearinghouse Fall 2022





Despite an overall decline in enrollment from 2021 to 2022, both undergraduate and graduate certificates experienced growth in 2022. In contrast, degrees of all levels experienced enrollment erosion.

Fall 2022	
% Change from 2021	
UNDERGRADUATE CERTIFICATE	2.5%
ASSOCIATE	-1.7%
BACHELOR'S	-1.5%
GRADUATE CERTIFICATE	2.6%
MASTER'S	-1.3%
FIRST PROFESSIONAL	-1.1%
DOCTORAL	-0.7%
GRAND TOTAL	-1.1%

*The US Department of Education defines a First Professional degree as one that requires at least 2 years of completion and 6 total academic years of college work while meeting the academic requirements to begin practice as a (typically licensed) professional.*

Source: <https://www2.ed.gov/about/offices/list/ous/international/usnei/us/professional.doc>





Institutions classified as “Highly Selective” saw an increase in enrollment from 2021 to 2022. All other institution types experienced an erosion in enrollment. The level of decline was relative to the selectiveness of the institution. Those considered to be “less selective” saw the largest erosion, followed by those who are considered “competitive”.

Fall 2022  
% Change from 2021

HIGHLY SELECTIVE	Public	0.6%
	Private Nonprofit	0.5%
	Total	0.5%
VERY COMPETITIVE	Public	-0.4%
	Private Nonprofit	-0.4%
	Total	-0.4%
COMPETITIVE	Public	-2.2%
	Private Nonprofit	-2.2%
	Total	-2.2%
LESS SELECTIVE	Public	-3.1%
	Private Nonprofit	-0.9%
	Total	-2.6%

Source: National Student Clearinghouse Fall 2022

Institutions seen as competitive or less selective saw the largest decrease in enrollment from 2021 to 2022.



## STATE

Fall 2021  
% Change from 2020

Fall 2022  
% Change from 2021

New Hampshire	5.4%	6.8%
Kansas	2.3%	-4.6%
South Carolina	0.9%	3.7%
Hawaii	-0.1%	-3.3%
Arizona	-0.3%	2.6%
Louisiana	-0.5%	-3.0%
Nebraska	-0.8%	0.9%
North Dakota	-0.8%	-0.1%
Virginia	-0.9%	-0.4%
Connecticut	-1.1%	0.7%
Idaho	-1.2%	-1.4%
Illinois	-1.3%	-1.3%
Michigan	-1.3%	-4.6%
Iowa	-1.5%	-1.0%
Montana	-1.7%	0.7%
Nevada	-1.7%	-4.3%
Alabama	-2.0%	-0.6%
Colorado	-2.1%	-2.1%
Delaware	-2.1%	-2.2%
Texas	-2.4%	0.3%
Kentucky	-2.6%	1.6%
North Carolina	-2.6%	1.4%
Florida	-2.8%	-1.5%
South Dakota	-3.2%	-0.6%
Georgia	-3.4%	0.7%
Mississippi	-3.7%	0.1%
Ohio	-3.7%	-3.4%
Maine	-3.8%	0.6%
West Virginia	-3.8%	-1.7%
Pennsylvania	-3.8%	-3.6%
Oklahoma	-4.0%	-0.9%
Tennessee	-4.1%	-1.2%
Arkansas	-4.3%	-1.9%
Missouri	-4.7%	-4.4%
New York	-4.8%	-3.5%
Wyoming	-5.1%	2.3%
Wisconsin	-5.5%	-3.1%
California	-5.9%	-1.1%
Maryland	-5.9%	-2.0%
Indiana	-7.2%	0.2%
New Mexico	-7.3%	4.3%
Alaska	-10.3%	-5.2%

Only three states saw undergraduate enrollments increase in 2021. In contrast, 15 states experienced enrollment growth in 2022. 13 states that experienced enrollment erosion in 2020-21 saw an increase in 2022.

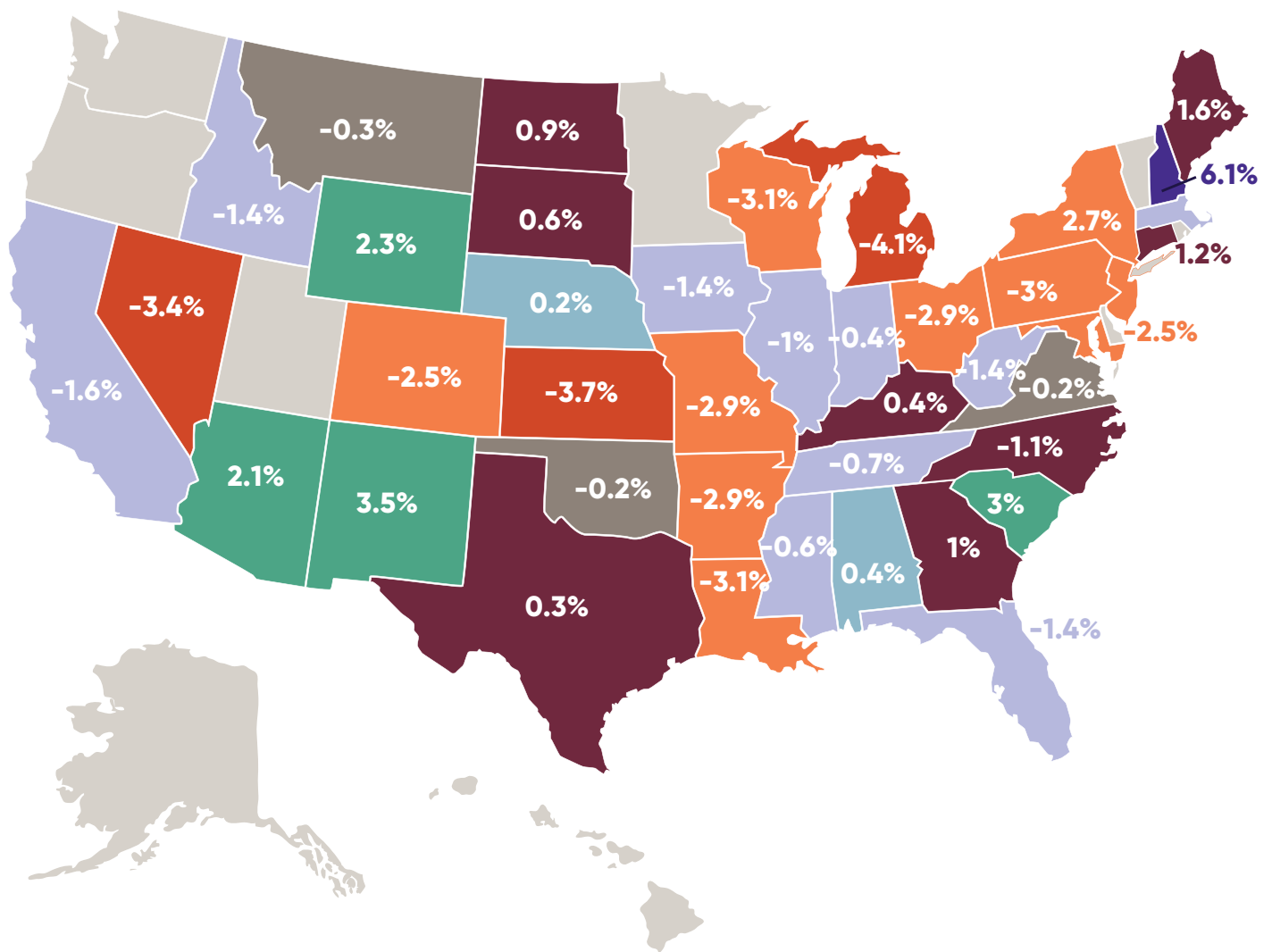
New Hampshire, for the second year in a row, saw the largest enrollment growth of any state in the nation. This may be driven in part by enrollments at Southern New Hampshire University (SNHU), which enrolls online students from across the nation. Kansas, which enjoyed the second largest growth in 2021, lost enrollments in 2022. Kansas was the only state to grow enrollment in 2021 but experience enrollment decline in 2022.

Source: National Student Clearinghouse  
Fall 2022





Enrollment change (Fall 2021-Fall 2022)



Source: National Student Clearinghouse Fall 2022



Eleven states saw a graduate enrollment increase in both 2021 and 2022. Nearly half (24) saw an enrollment increase in 2021 but then experienced a decline in enrollment in 2022. In total, more than half of states saw an enrollment erosion in 2022.

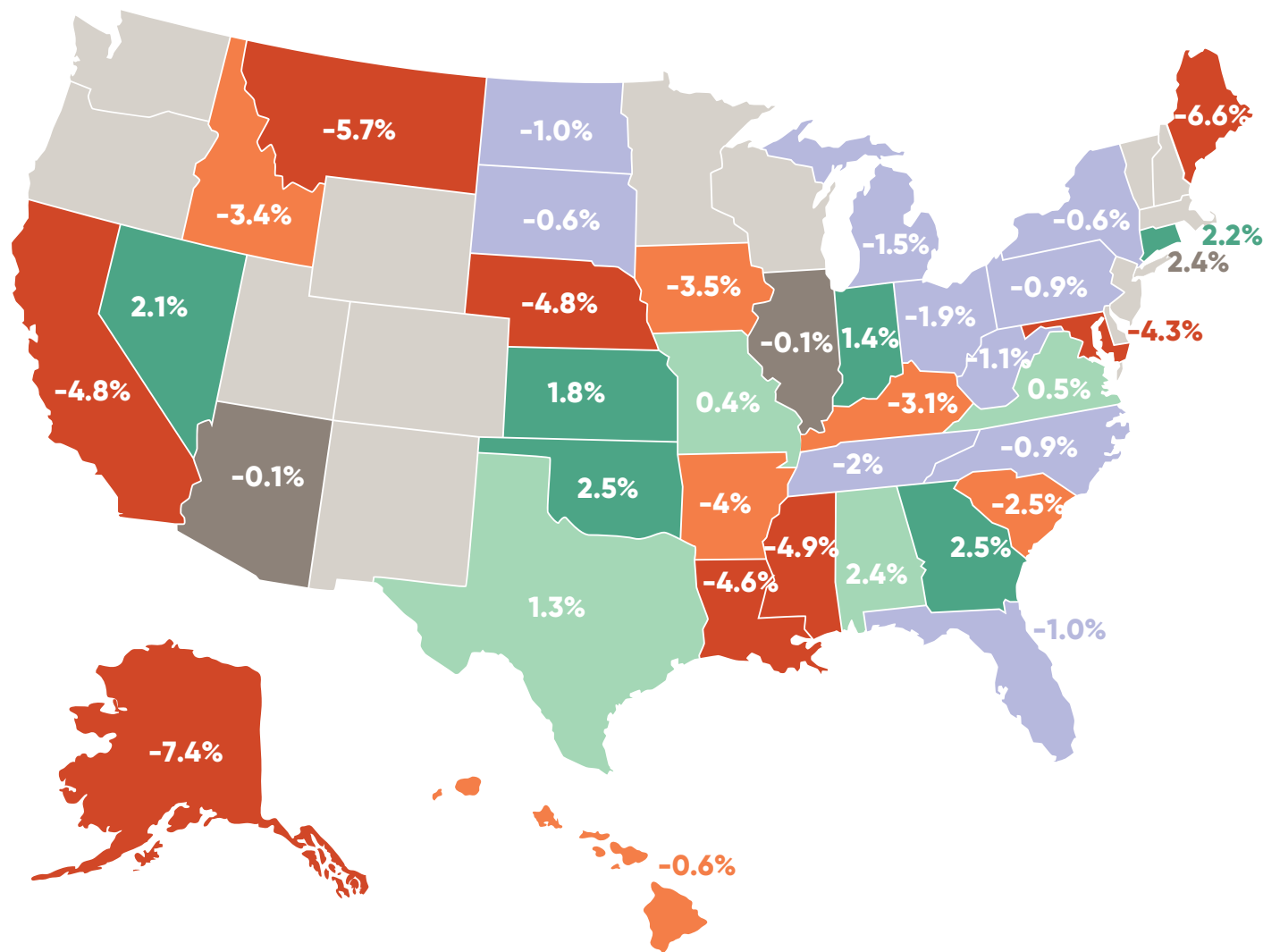
	Fall 2021 % Change from 2020	Fall 2022 % Change from 2021
<b>OKLAHOMA</b>	<b>5.4%</b>	<b>2.5%</b>
<b>RHODE ISLAND</b>	<b>4.0%</b>	<b>2.4%</b>
<b>GEORGIA</b>	<b>7.5%</b>	<b>2.4%</b>
<b>CONNECTICUT</b>	<b>2.2%</b>	<b>2.2%</b>
<b>NEVADA</b>	<b>0.5%</b>	<b>2.1%</b>
<b>KANSAS</b>	<b>1.5%</b>	<b>1.8%</b>
<b>INDIANA</b>	<b>0.9%</b>	<b>1.4%</b>
<b>TEXAS</b>	<b>4.3%</b>	<b>1.3%</b>
<b>ALABAMA</b>	<b>0.6%</b>	<b>1.1%</b>
<b>VIRGINIA</b>	<b>4.5%</b>	<b>0.5%</b>
<b>MISSOURI</b>	<b>1.7%</b>	<b>0.4%</b>

Source: National Student Clearinghouse Fall 2022





All in all, more than half of states saw an enrollment erosion in 2021-22.



Source: National Student Clearinghouse Fall 2022

## STATE

Fall 2021  
% Change from 2020

Fall 2022  
% Change from 2021

Oklahoma	5.4%	2.5%
Georgia	7.5%	2.4%
Rhode Island	4.0%	2.4%
Connecticut	2.2%	2.2%
Nevada	0.5%	2.1%
Kansas	1.5%	1.8%
Indiana	0.9%	1.4%
Texas	4.3%	1.3%
Alabama	0.6%	1.1%
Virginia	4.5%	0.5%
Missouri	1.7%	0.4%
Arizona	1.3%	-0.1%
Illinois	5.0%	-0.1%
Hawaii	6.4%	-0.6%
New York	3.1%	-0.6%
South Dakota	3.1%	-0.6%
North Carolina	2.5%	-0.9%
Pennsylvania	1.0%	-0.9%
Florida	5.8%	-1.0%
North Dakota	1.5%	-1.0%
West Virginia	0.3%	-1.1%
Michigan	1.3%	-1.5%
Ohio	2.3%	-1.9%
Tennessee	3.1%	-2.0%
South Carolina	4.4%	-2.5%
Kentucky	1.6%	-3.1%
Idaho	5.3%	-3.4%
Iowa	1.6%	-3.5%
Arkansas	2.7%	-4.0%
Maryland	9.8%	-4.3%
Louisiana	4.2%	-4.6%
California	0.5%	-4.8%
Nebraska	-3.6%	-4.8%
Mississippi	5.5%	-4.9%
Montana	6.8%	-5.7%
Maine	8.8%	-6.6%
Alaska	-8.7%	-7.4%



Source: National Student Clearinghouse Fall 2022



Overall, undergraduate enrollment shrank from 2021 to 2022. Despite the decline in overall undergraduate enrollment, Primarily Online Institutions (POIs) experienced enrollment growth in 2022. Note that graduate erosion at POIs was roughly the same as the overall graduate enrollment decline.

Award Level	Gender	Fall 2022 % Change from 2021
UNDERGRADUATE	Men	4.4%
	Women	2.3%
	Total	3.2%
GRADUATE	Men	0.2%
	Women	-1.4%
	Total	-0.9%
GRAND TOTAL		2.0%

Source: National Student Clearinghouse Fall 2022



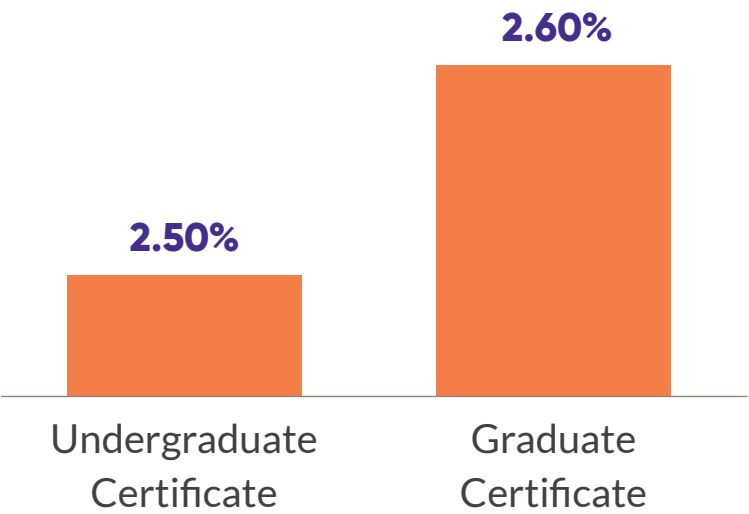
Graduate erosion at POIs was roughly the same as graduate enrollment decline overall.



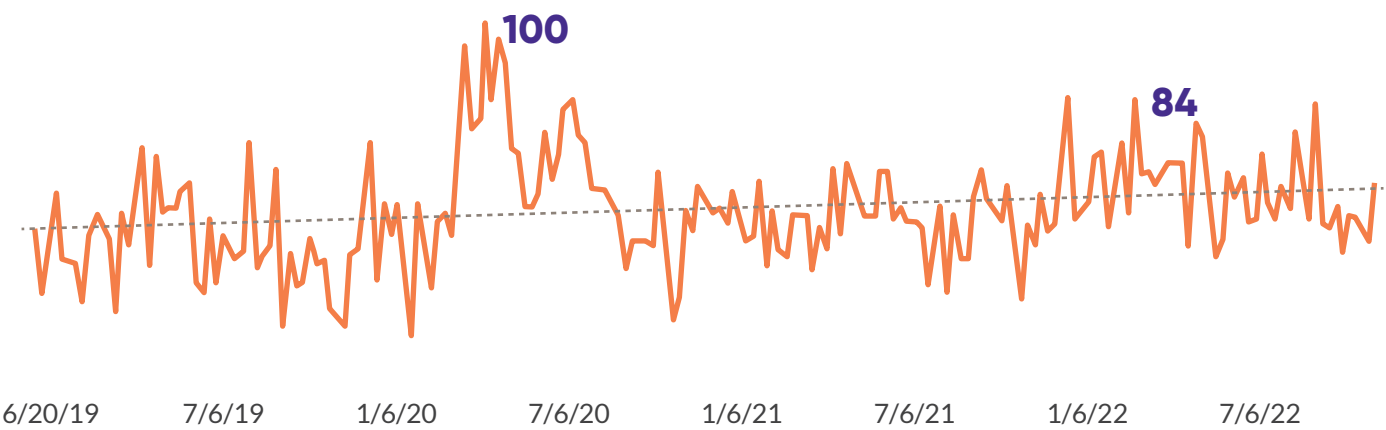
# Demand for Certificates

As noted in the Fall 2022 enrollment summary, demand continues to grow for both undergraduate and graduate certificates. Indexed Google Search Trends also illuminate growth in demand for certificates.

YoY Fall Enrollment Growth



Search Term: Online Certificates

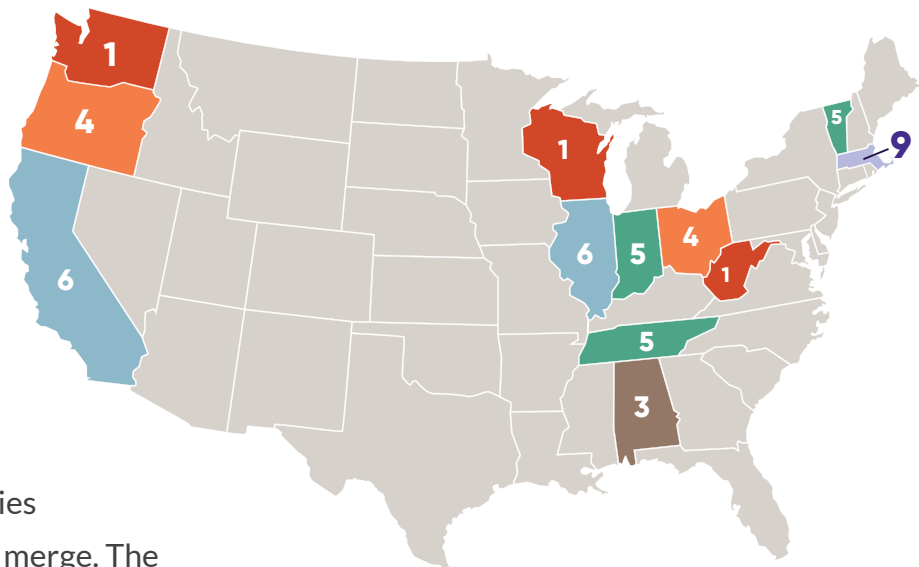


Source: Google Search Trend Index 1/1/2019-11/15/2022



# College Closings and Mergers by State

Universities continue to struggle with enrollment declines and general underfunding. As the pressure is on to attract and retain enrollments, the need for effective marketing continues to grow.



Since 2016, 81 colleges/universities have announced plans to close or merge. The largest number of closures are found in Massachusetts (9), with another 20 in the northeastern states of New York, Vermont, Connecticut, Pennsylvania, Delaware, Maine, New Hampshire, and New Jersey. In all, 32 states are home to institutions that have announced closures or mergers.

*Data Note: Prior to this update, we removed for-profit colleges from our list; this was due to their differences in scale from private nonprofit and public institutions as well as the sometimes-fragmented nature of their closings.*

Source: HigherEd Dive: <https://www.highereddive.com/news/how-many-colleges-and-universities-have-closed-since-2016/539379/>

## TOP 10

**Massachusetts (9)**  
**California (6)**  
**Illinois (6)**  
**New York (6)**  
**Indiana (5)**

**Tennessee (5)**  
**Vermont (5)**  
**Ohio (4)**  
**Oregon (4)**  
**Alabama (3)**

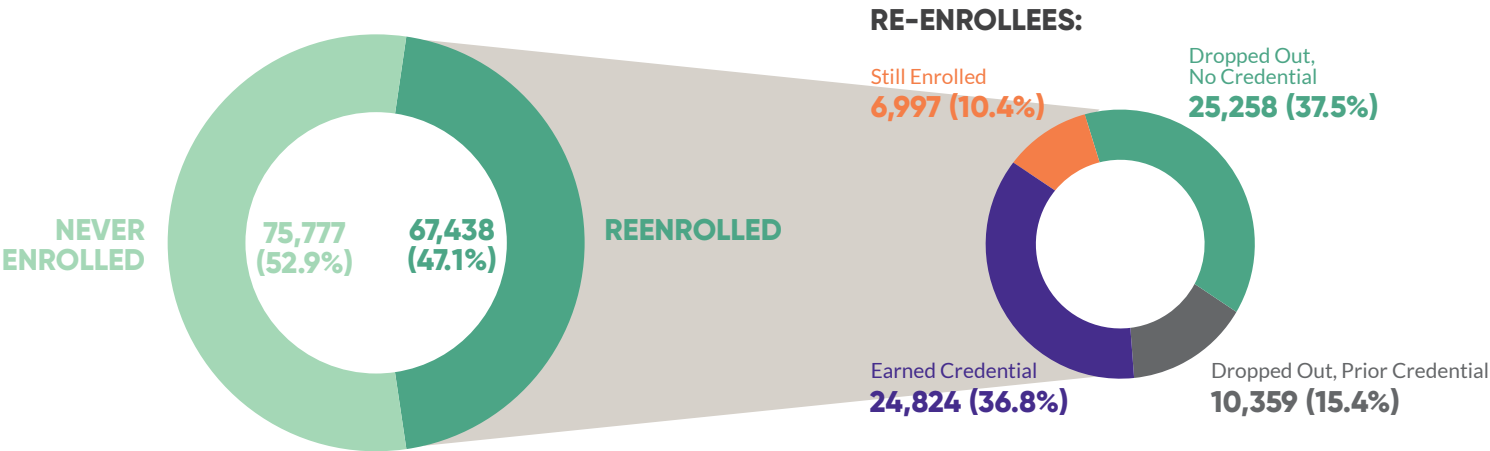




# When institutions close, where do their students go?

What happens to the students of those institutions that have closed their doors? Students enrolled at schools that close have much lower rates of educational attainment. 52.9% of those impacted never enroll again. Of the 47% who enroll at a new institution, 37% eventually drop out and fail to earn a credential.

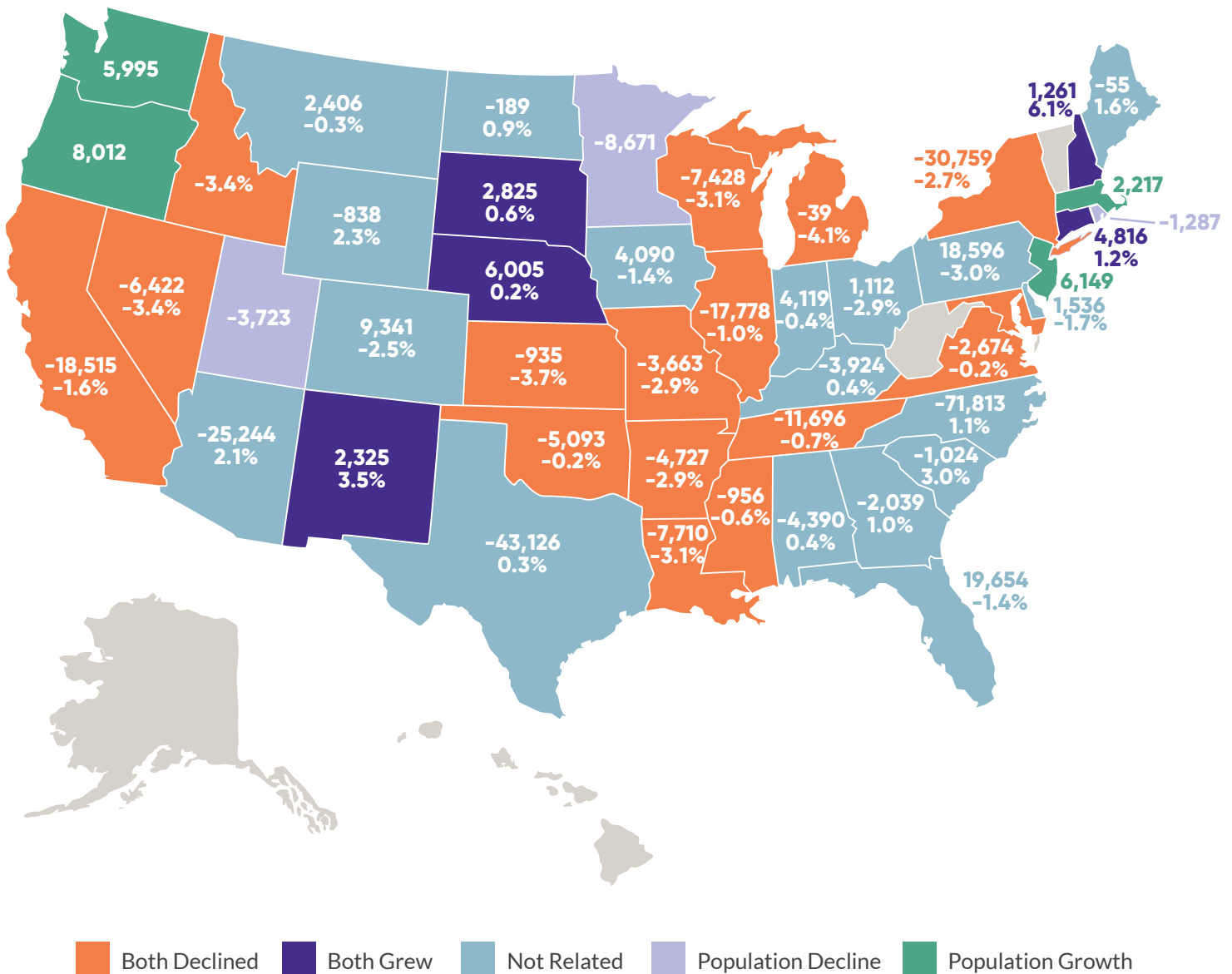
Many impacted students take time off before entering a new institution. Almost 26% enroll more than a year after their previous college or university closed. Those students that delay re-enrollment are far less likely to receive a credential than those who re-enroll soon after their school closes. This reinforces the need to give students an immediate option to transfer to another institution.



Source: <https://www.insidehighered.com/news/2022/11/15/when-colleges-close-students-arent-likely-re-enroll>



## Fall Enrollments vs Population Change

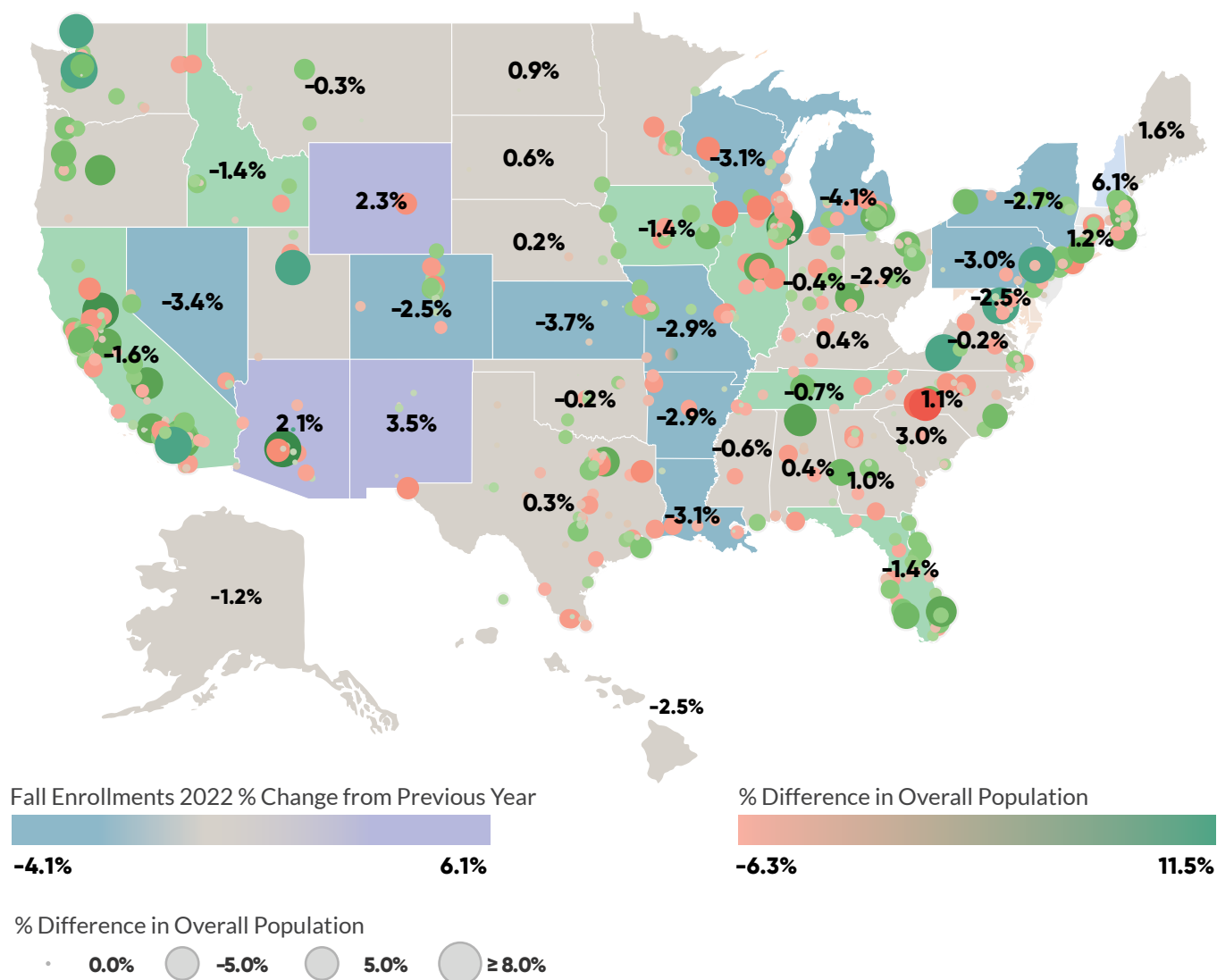


Source: NCES Fall Enrollments (Preliminary) / Census Current population survey

Both enrollments and population saw significant change in 2022. To understand if the changes were related, the map above displays each state's fall enrollment percent change as well as their population change. Most states did not see a relation between the population change and fall enrollments, However, several states did experience a statistically significant related change. States in dark orange represent the highest proportion of related decline, where both enrollment and population fell.



## Fall Enrollments Change % vs Population Change %

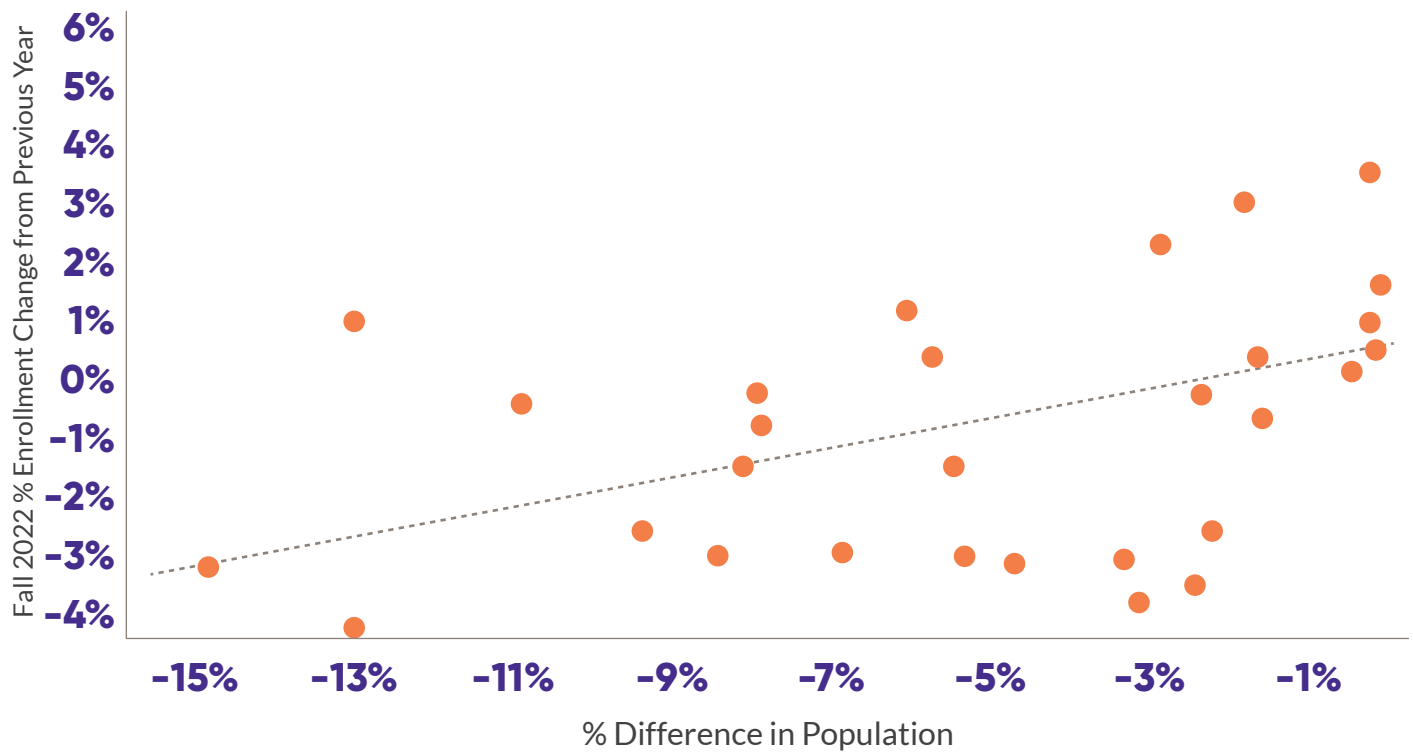


Source: NCES Fall Enrollments (Preliminary) / Census Current population survey

With the added detail of city population change, we can derive greater insight into the patterns of both enrollment and population change in 2022. Larger circles indicate greater change; with green circles indicating growth and red circles indicating decline. Most states show a diversity of change, with great growth in some areas offset by a decline in other population centers. Large growth patterns can be found in California, Florida, Alabama, Utah, Washington, Pennsylvania, New York, Virginia, and Oregon. The states that saw the greatest decline in population include: North Carolina, California, and Michigan.



## Correlation Between Population Change and Enrollment Change - Population Decline



A comprehensive regression model statistical analysis suggests there is a statistically valid relationship between the percent of population change and percent of fall enrollment change.

Note: Trend Lines Model Values. R-Squared: 0.182414, p value: 0.0185752

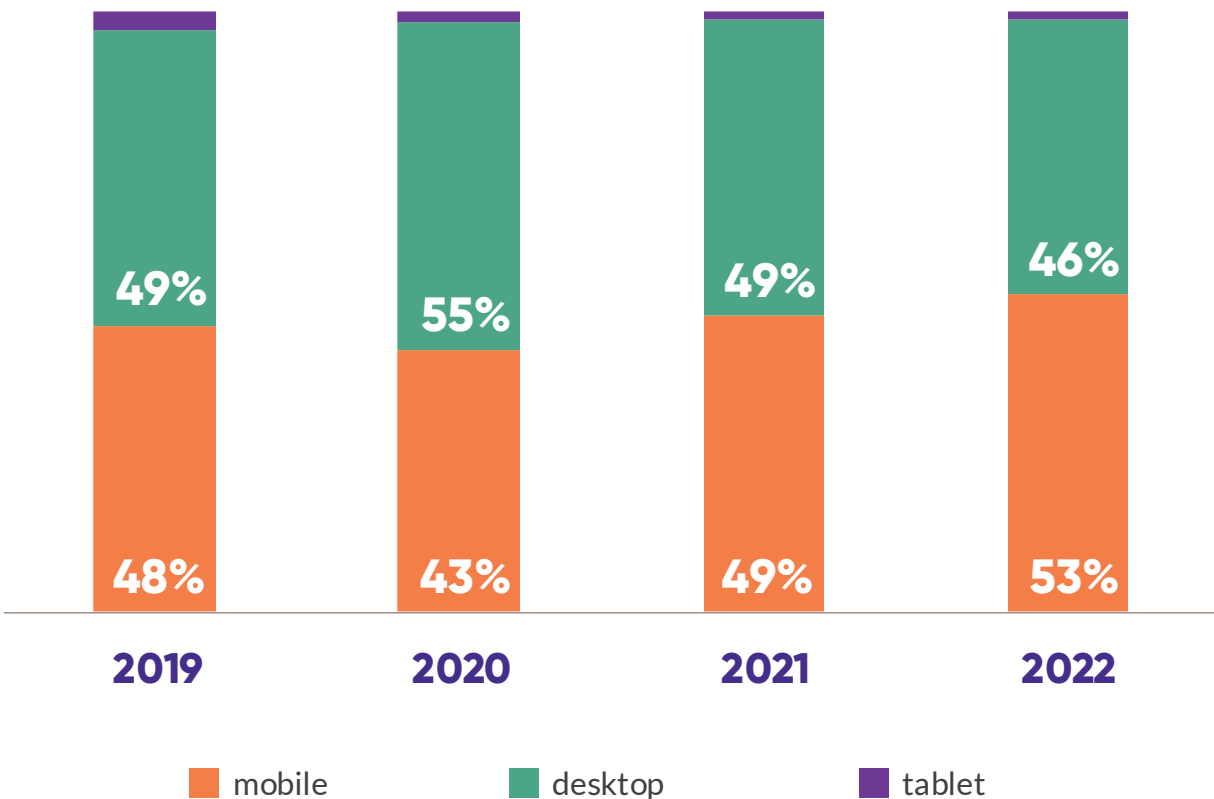
Source: NCES Fall Enrollments (Preliminary) / Census Current population survey



# 2023 Marketing Benchmarks

## Site Traffic

For the first time in 2022, we saw mobile web traffic make up over half of total website traffic on those higher education websites we monitor. After a decline in mobile web traffic in 2020, the percent of mobile-first traffic increased to 53% in 2022.

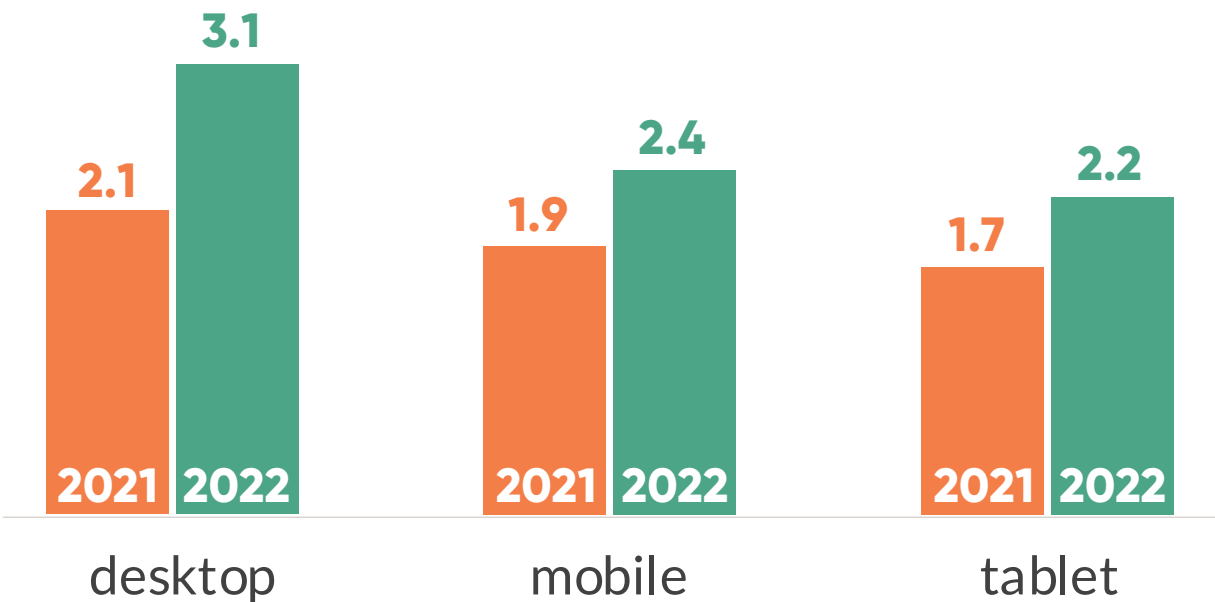


Source: EducationDynamics proprietary client data January 2019 - October 2022





Prospective students are engaging with more web pages in 2022. The number of pages visited increased by an astounding 40% from 2021 to 2022. Among the websites we monitor for traffic, visitors on desktop devices visit the most pages at 3.1 pages per session. While the number of total visitors is shrinking, visitors are conducting more research per session.

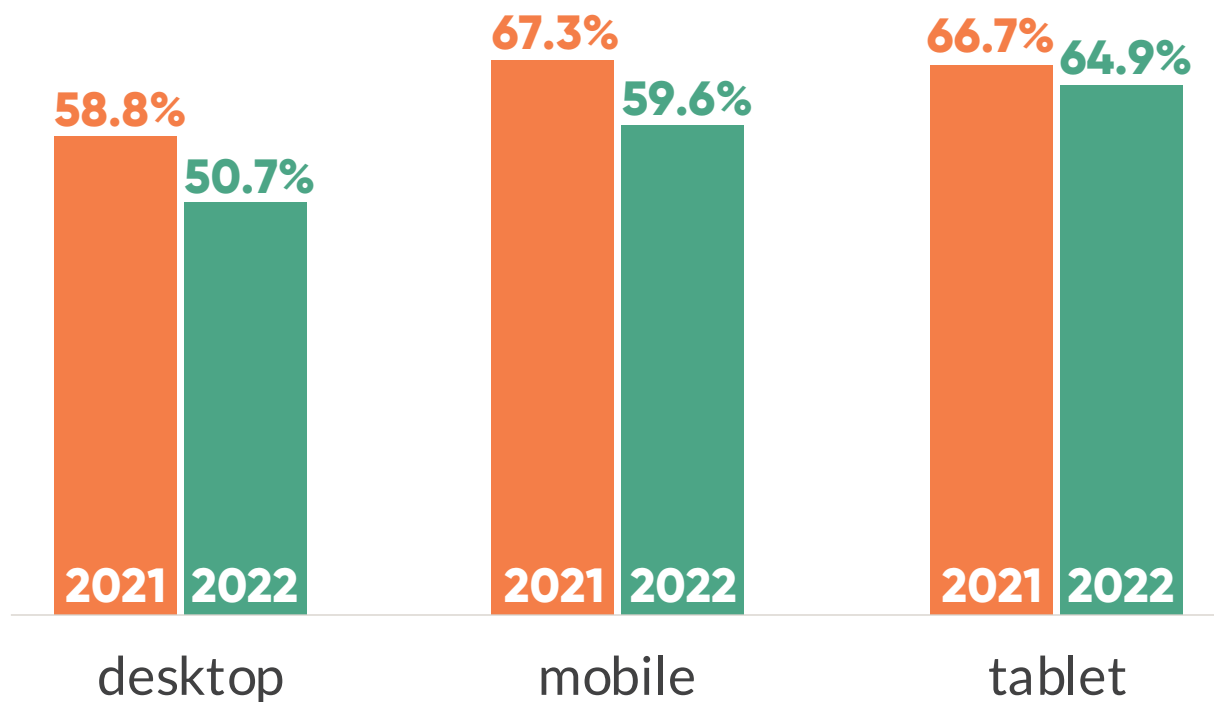


Source: EducationDynamics proprietary client data January 2019 - October 2022





Bounce rates are also decreasing across all devices. The average 2021 bounce rate was 63%. Meanwhile, the bounce rate in 2022 is down to 57%, showing higher engagement across monitored higher education websites.



Source: EducationDynamics proprietary client data January 2019 - October 2022

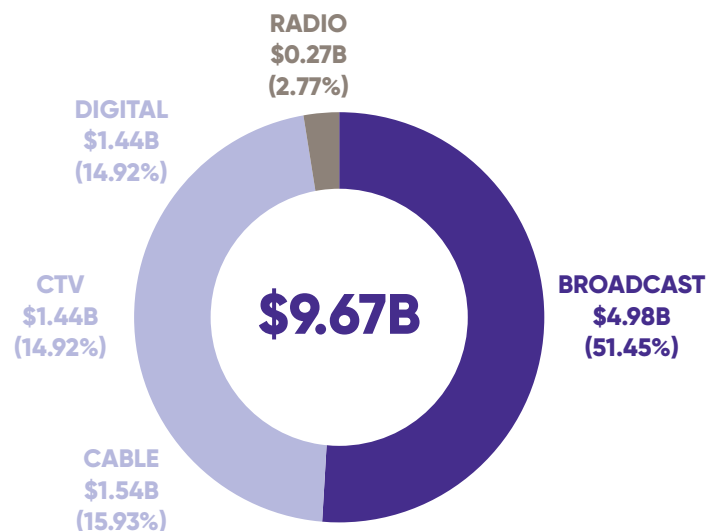
# Media Landscape

Political advertising significantly impacted the overall media landscape in 2022.

Projections indicate that close to three billion dollars were spent on digital or connected TV advertising during the 2022 midterm elections. Combined, these would be the second largest advertising components for political outreach advertising – following only broadcast television. Digital and Connected TV (CTV) advertising account for nearly 30 percent of all 2022 midterm elections political advertising, with overall political advertising spend projected to have reached close to \$10 billion dollars during the midterm elections.

## Political advertising

### AdImpact – Digital Political Spending



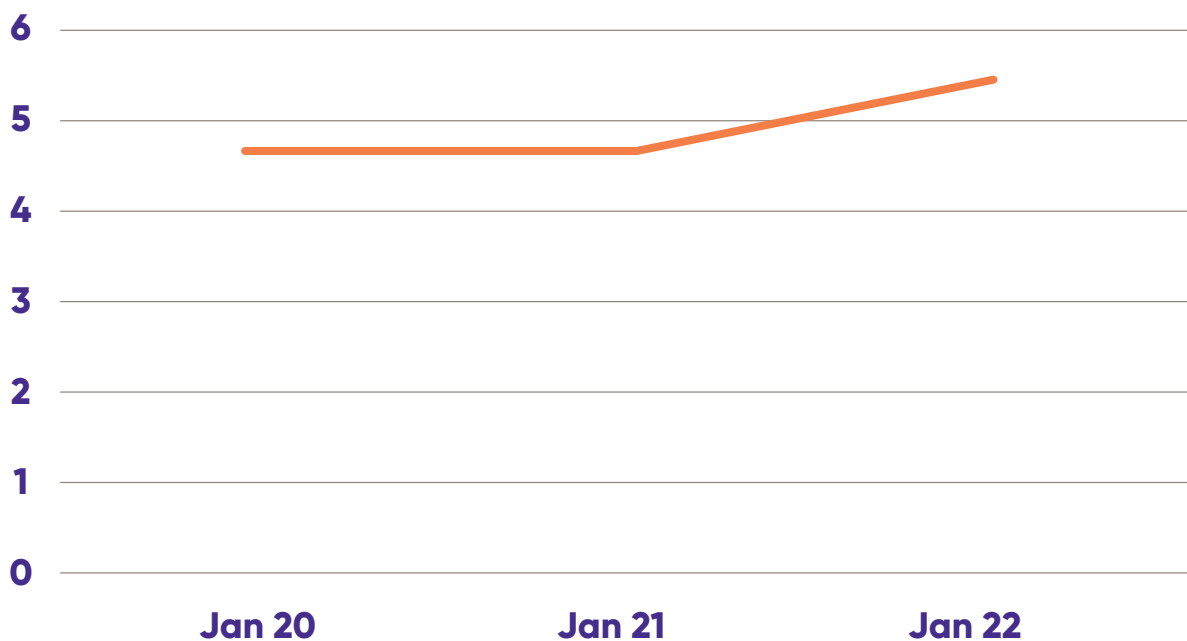


## Television/Streaming Services

According to Nielsen data, streaming media now accounts for more than one third of all TV consumption in the U.S. Additionally, streaming media has now surpassed cable television in terms of consumption.

Over 85 million U.S. homes now stream content via CTV every month. Those households streamed an average of 122 hours of CTV content per month.

Streaming Services Watched Per Household



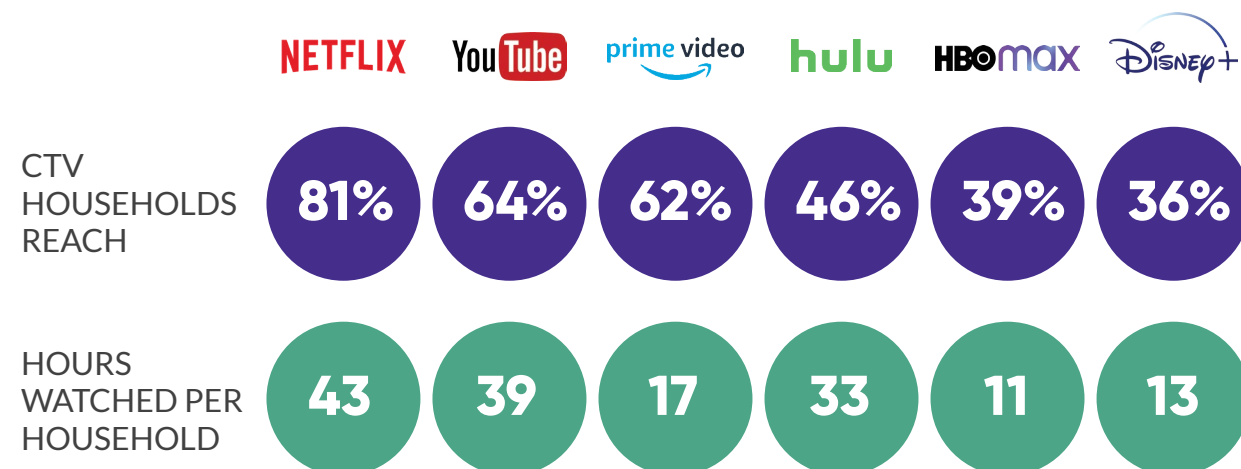
COMSCORE CTV Intelligence, CTV devices March 2021-2022



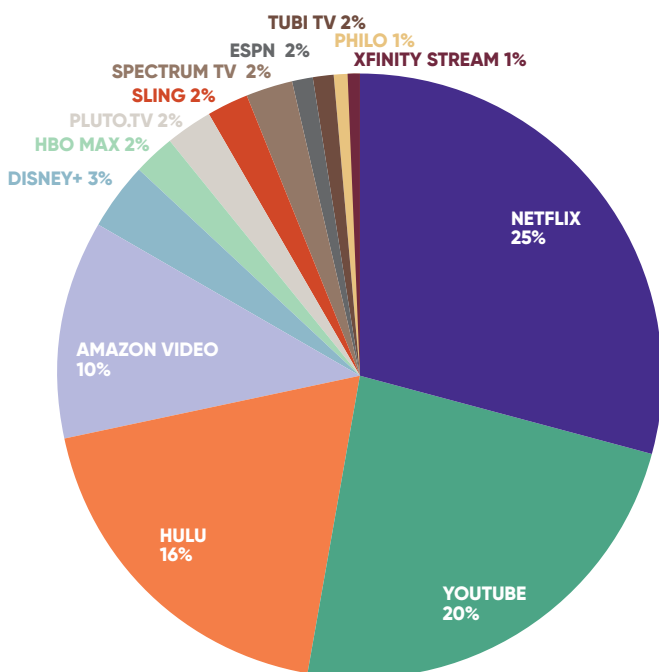


Of Connected TV (CTV) households, 81 percent stream Netflix – giving it both the largest reach and the highest number of monthly hours consumed. Netflix homes streamed an average of 43 hours as of March 2022. Netflix’s recent move to offering an ad-supported model makes the platform one of the most important marketing platforms to watch in 2023.

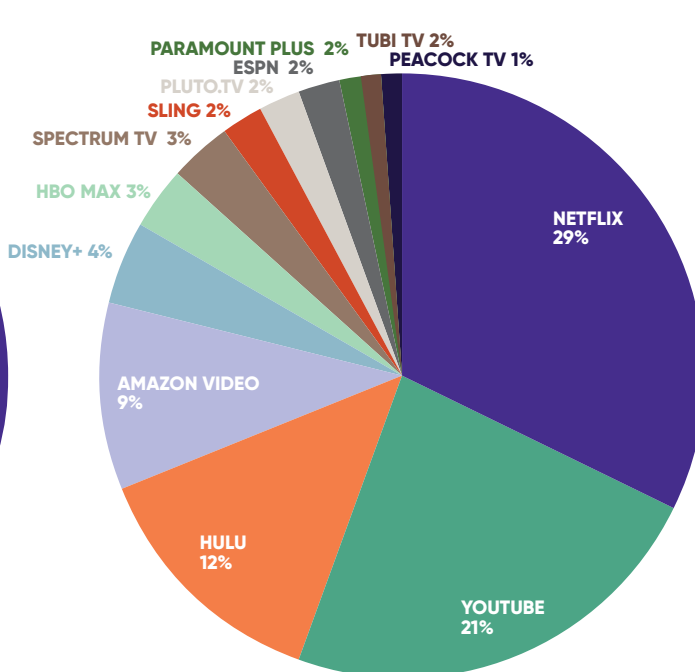
YouTube, second in both reach and consumption, has long permitted advertising. Hulu is the other major ad-supported streaming service and also achieves significant reach with 46 percent of CTV households and 33 hours of streaming per month.



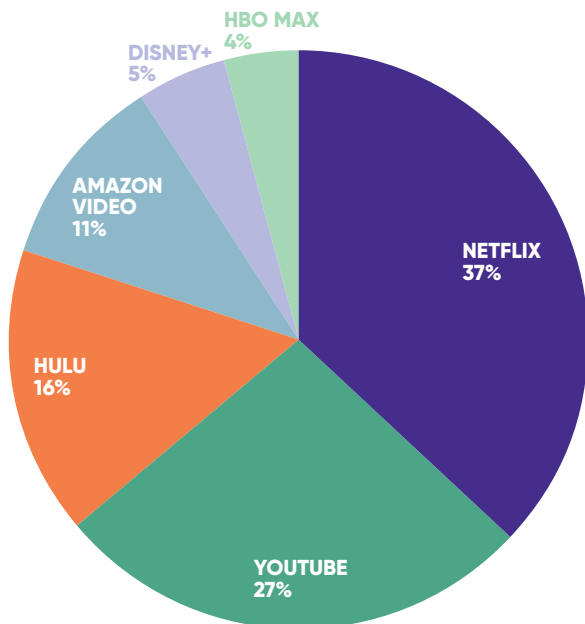
March 2021  
8.3B Total Hours Watched



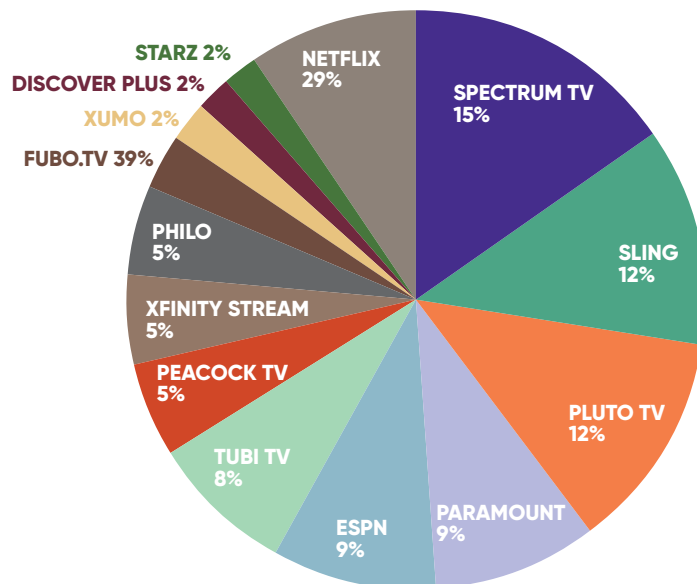
March 2022  
10.5B Total Hours Watched



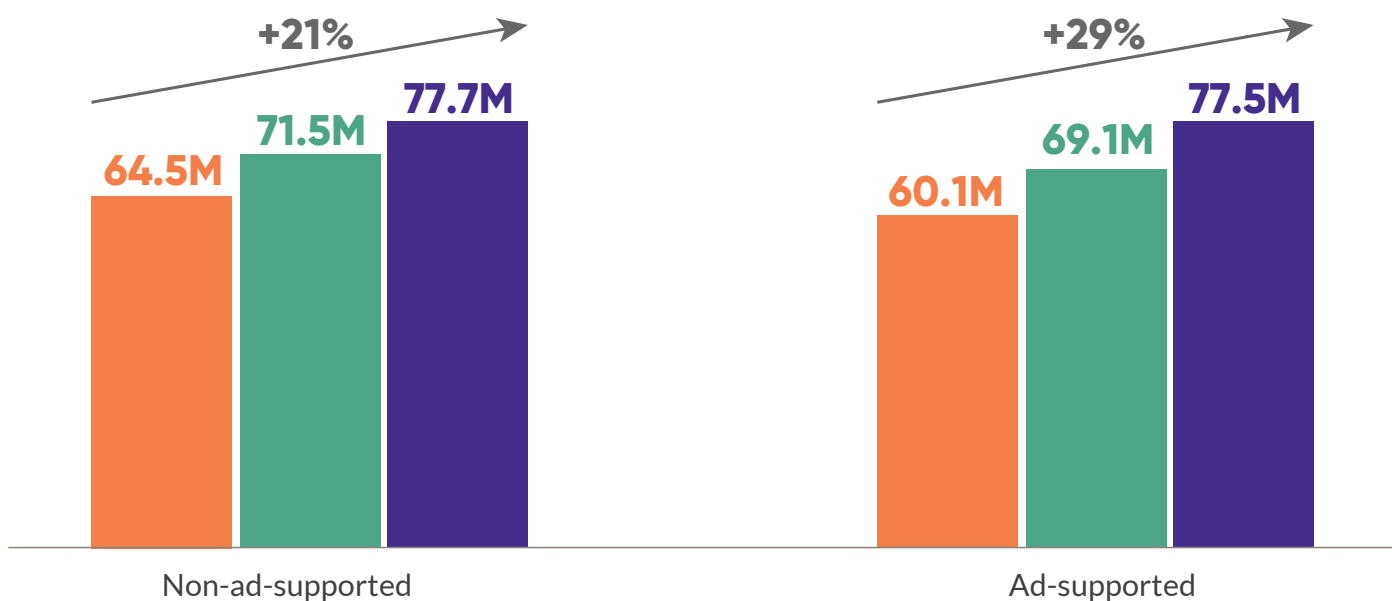
Top 6 Streaming Services  
8B Total Hours Watched



Outside Top 6  
1.9B Total Hours Watched

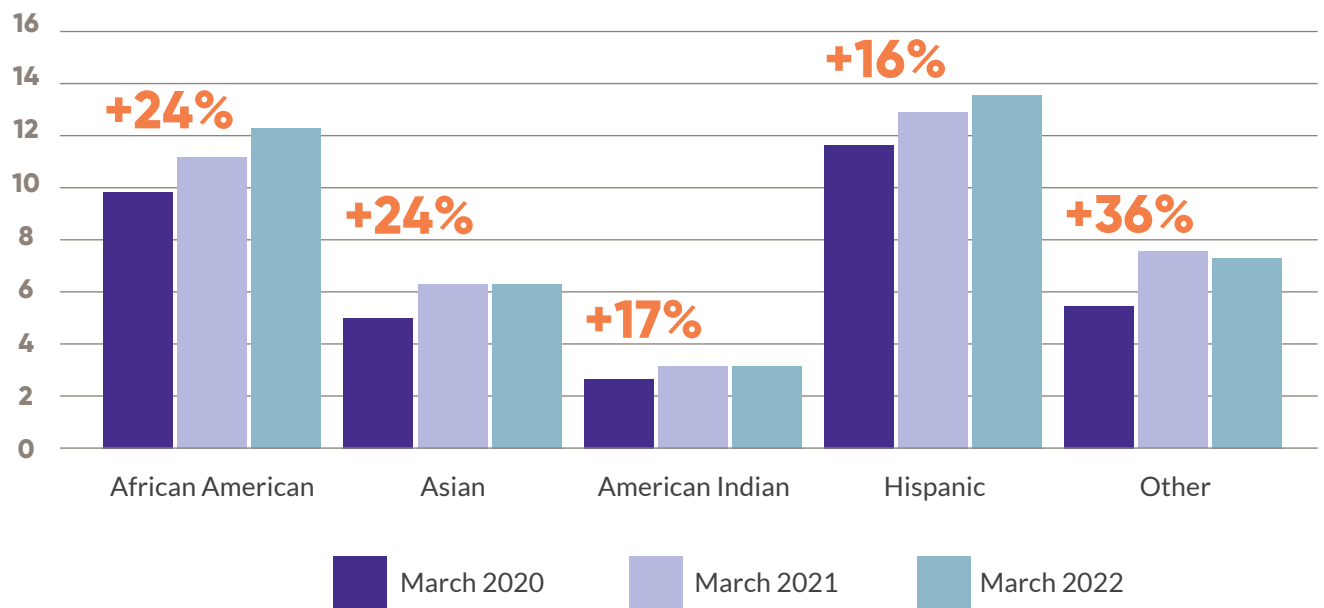


Among CTV households, ad-supported viewership has increased by 29 percent since 2020, outpacing ad-free platforms, which increased by 21 percent. Thus, viewers are willing to watch advertising for content.

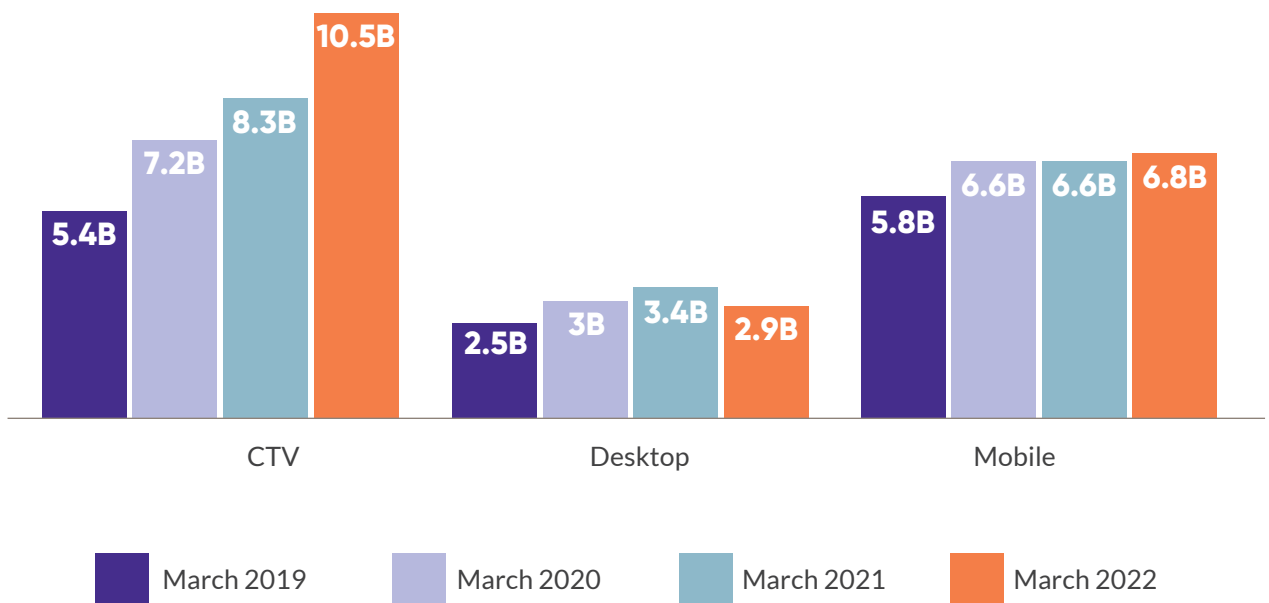




Streaming adoption is prevalent across a diverse audience and provides reach to audiences that are often considered to be underserved by higher education.



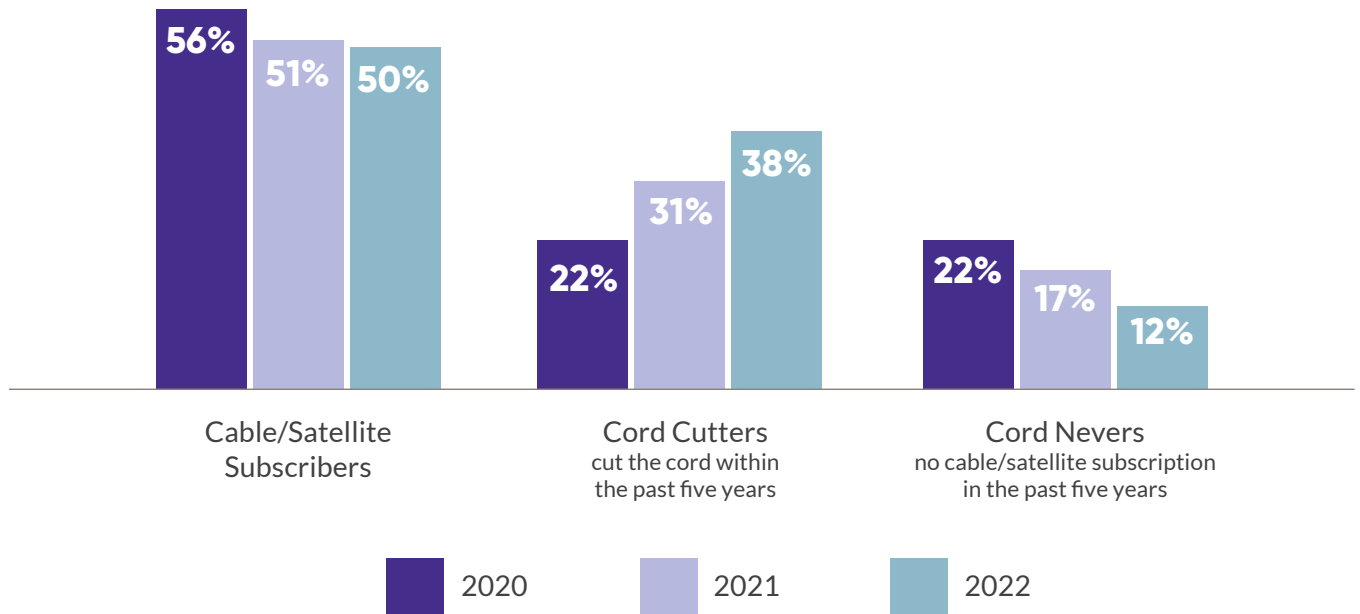
A significant amount of streaming is conducted on mobile devices.



Source: Comscore CTV Intelligence, CTV Devices, March 2022, US

## Cord Cutting

Since 2020, Cable television subscriptions have fallen 6 percent. Meanwhile, cord cutting has risen from 22 percent in 2020 to 38% in 2022. When combined, those classified as Cord Cutters and Cord Nevers now make up 50% of all CTV households.



Source: (COMSCORE CTV Intelligence, CTV devices March 2020-2022)

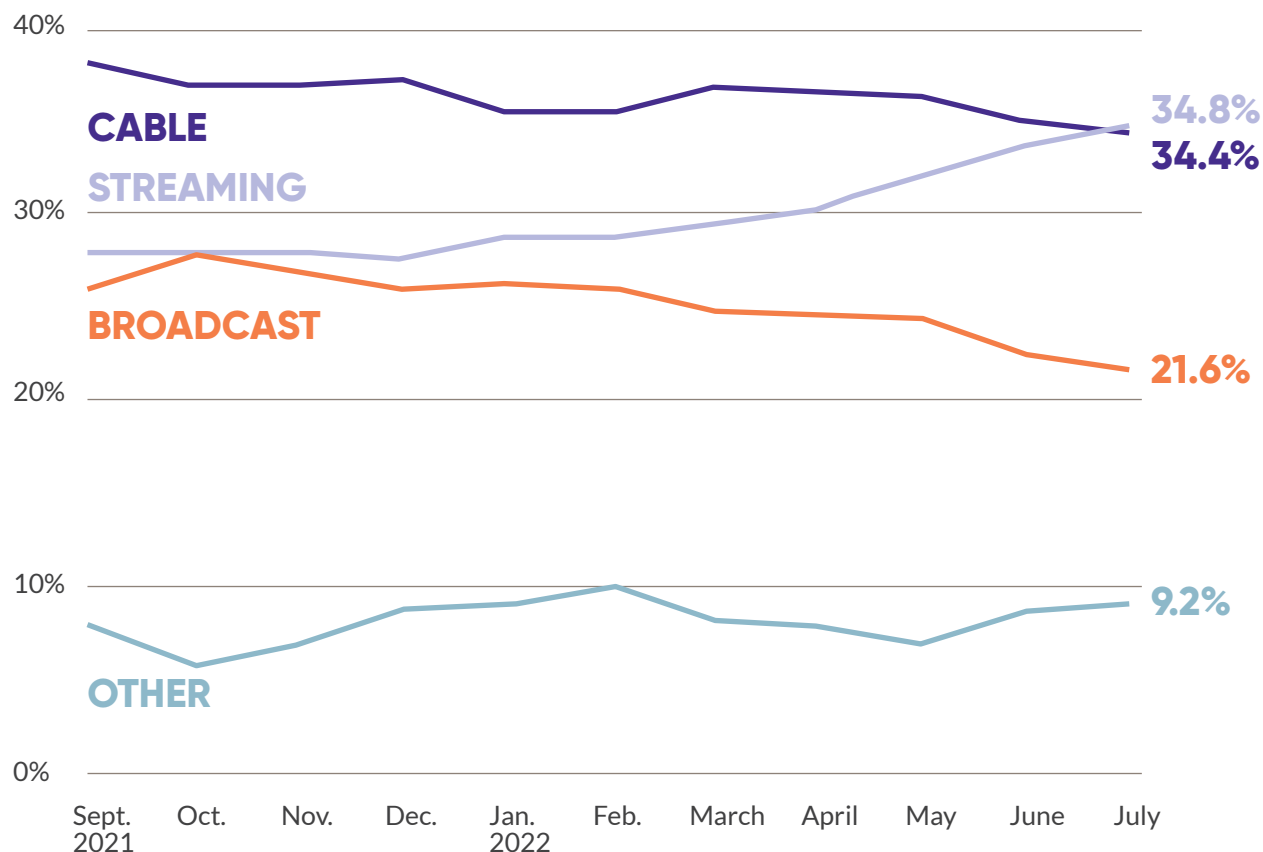




# Television Consumption

From 2021 to 2022, streaming media grew in percentage of television consumption. In July 2022, streaming services just edged cable in monthly consumption.

Share of total TV consumption, by type



Source: Sara Fischer, Axios Media Trends; <https://www.axios.com/2022/07/26/streaming-third-us-tv-consumption>

## Netflix

The top streaming platform, accounting for 7.7% of TV consumption as of July 2022.

## YouTube, Amazon Prime Video and Disney+

Increased share of viewing time to 7.3%, 3% and 1.8%, respectively.

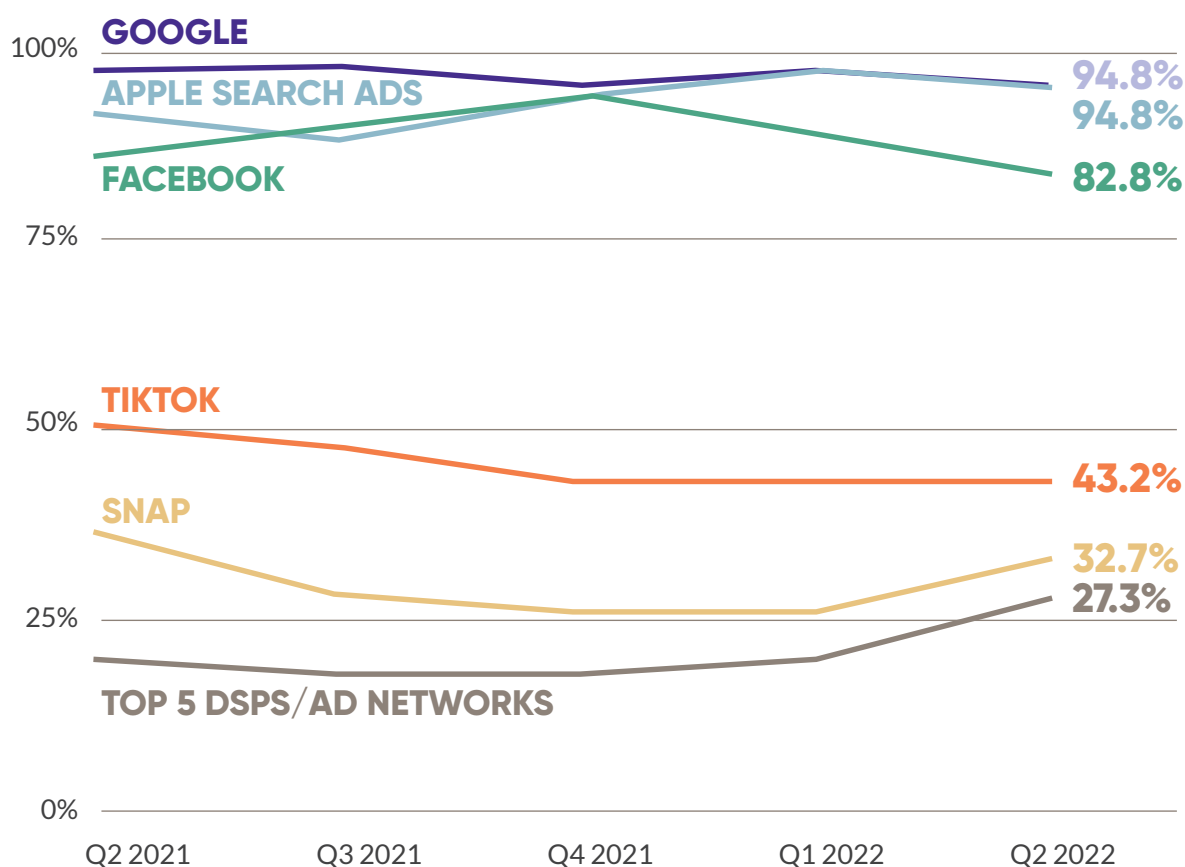
## HBO Max

Accounts for 1% of total consumption.



Google remains the largest media channel by ad adoption, as it was in 2021. However, it is now tied for the largest media channel with Apple Search Ads.

Media channel ad adoption, by network



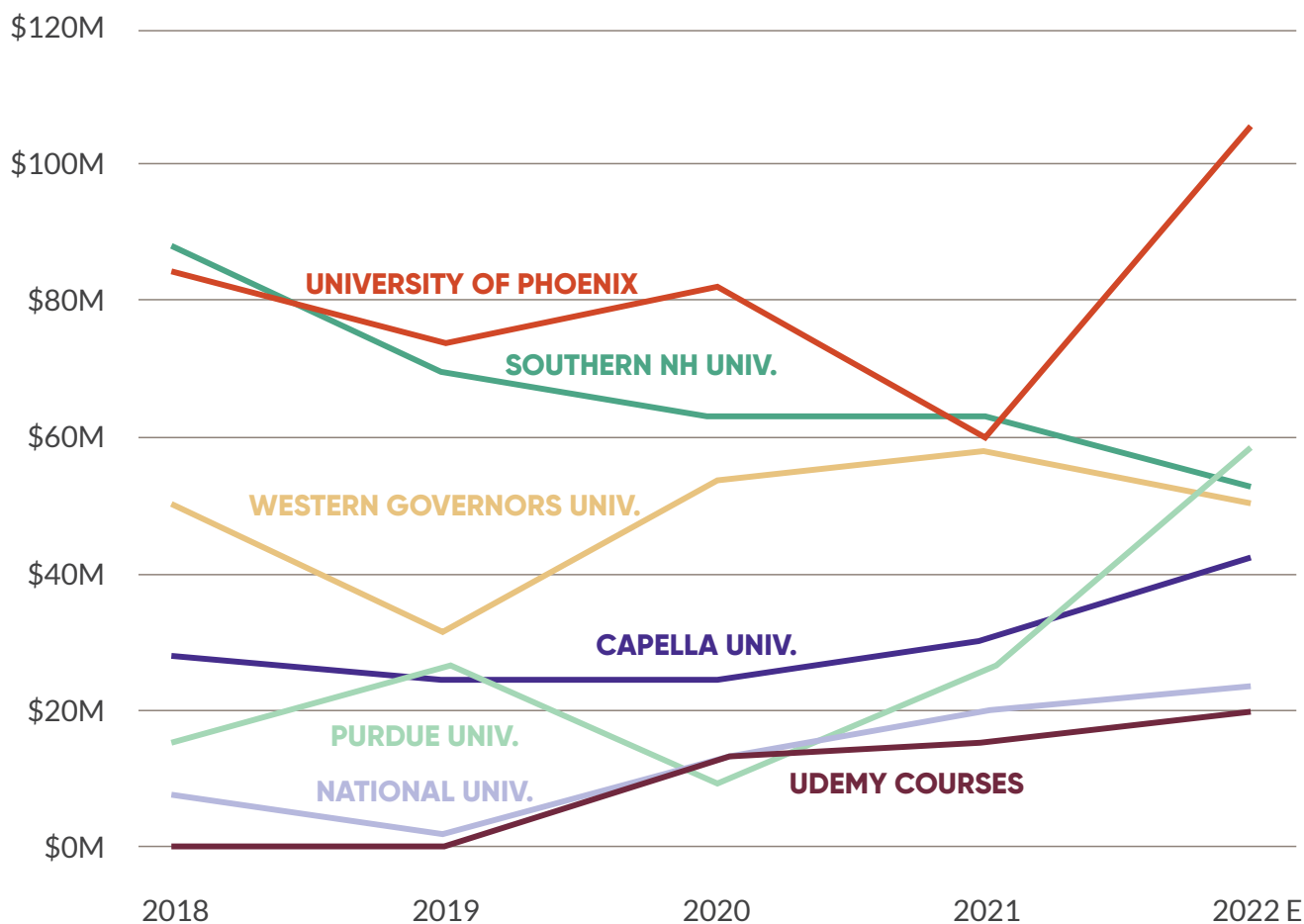
Source: InMobi; Tory Lysik/Axios

**A new analysis from MoffettNathanson, a leading market research firm, suggests the slowdown in digital ad growth among major tech companies "reflects the movement of budgets to emerging ad platforms like TikTok and Apple," in addition to broader macroeconomic concerns.**

## Top Education Advertisers

The top seven education advertisers in 2022 include:

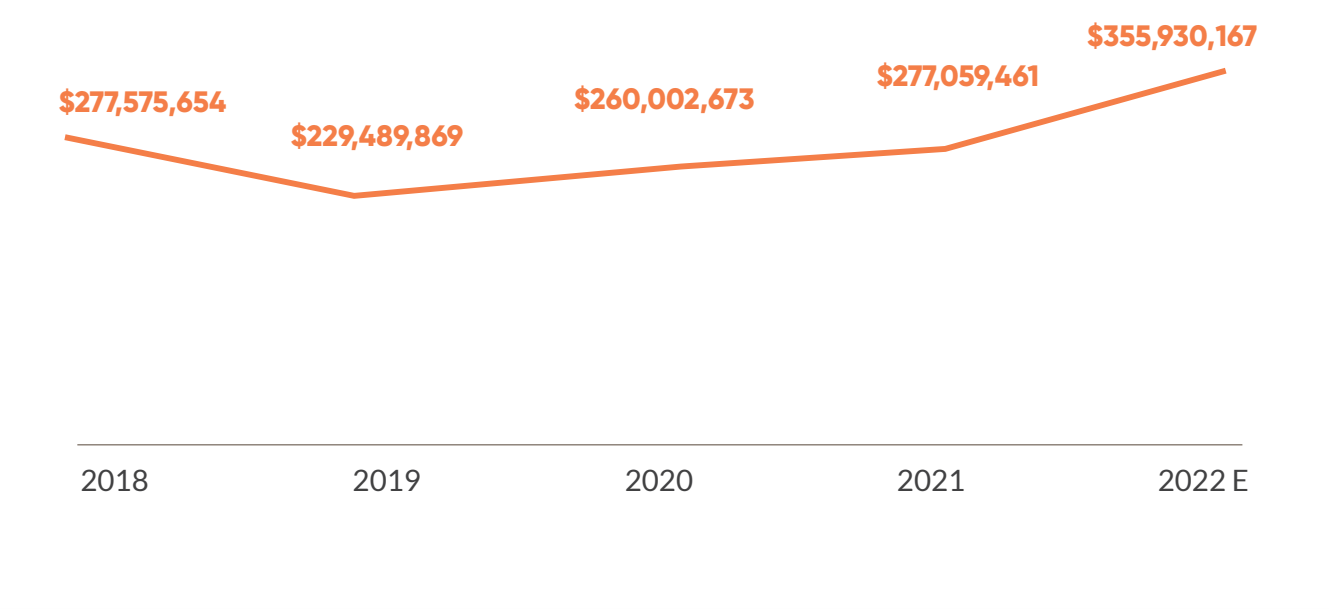
University Of Phoenix, Purdue University, Southern NH University, Western Governors University, Capella University, National University, and UdeMy Courses



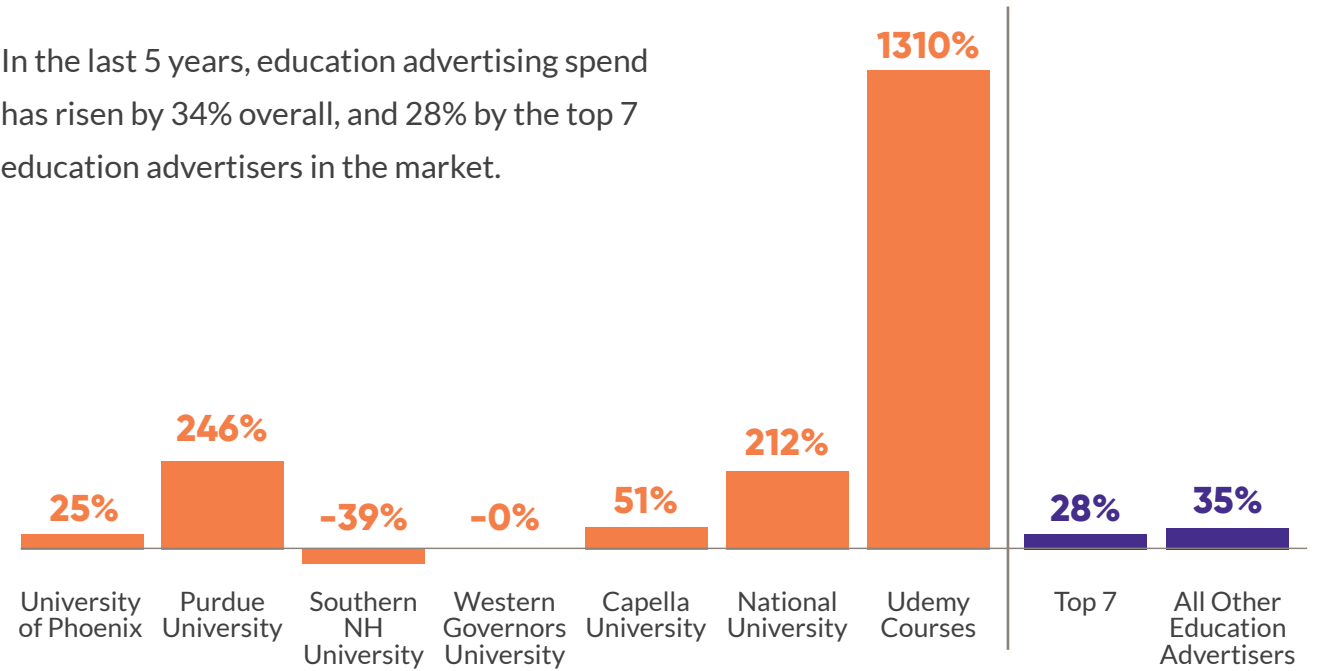
Source: Kantar Media. 2022 estimated based on current run rate through October 2022  
\*AVOD and Mobile App measurement began in 2021  
Includes: AVOD, Print & Magazines, Online Video, Mobile Web Video, Outdoor, Mobile App, Mobile Web, Television, Internet Display and Internet Search advertising buys



The top seven schools spent \$277 million in 2021. It is projected that they spent over \$350 million in 2022.



In the last 5 years, education advertising spend has risen by 34% overall, and 28% by the top 7 education advertisers in the market.



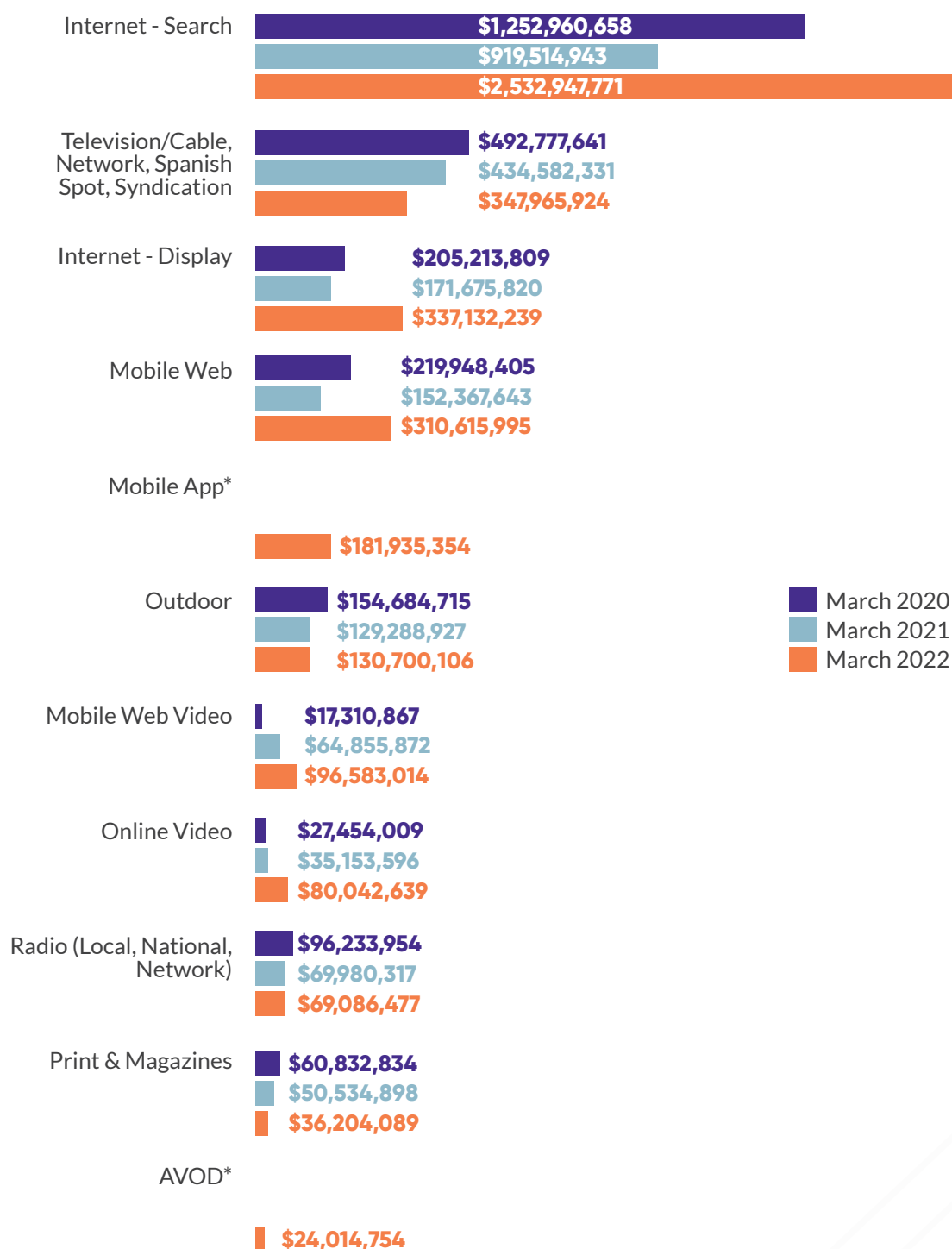
Source: Kantar Media. 2022 estimated based on current run rate through October 2022  
 \*AVOD and Mobile App measurement began in 2021



## Diversification of Media Types

Education advertisers continue to increase spending, in total 104% in 2022 vs. 2021.

Education advertisers continue to increase spend in online properties, increasing search spend by roughly 175% in 2022, followed by online video (up 128%) and mobile (up 103%.) In contrast, print ad spend is down 28%, while television ad spend is down 20% and radio 1.28%.

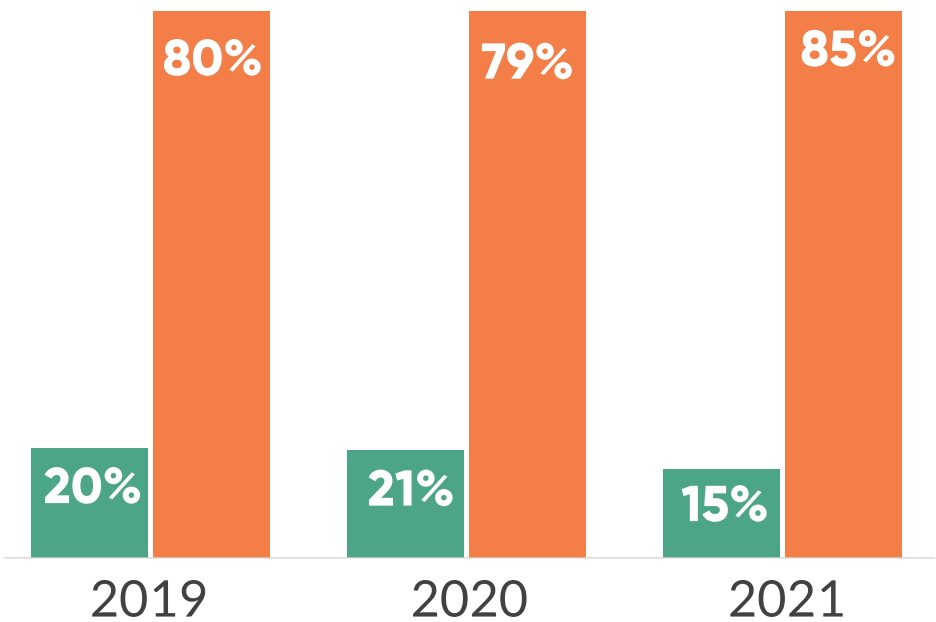
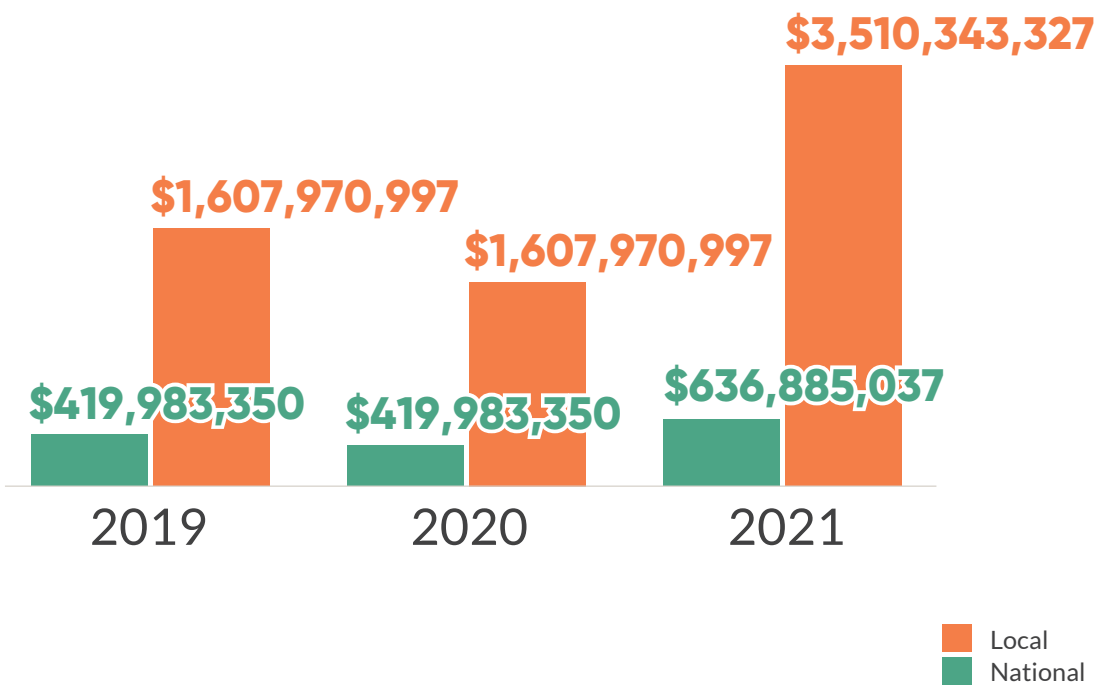


Source: Kantar Media  
 \*AVOD and Mobile App measurement began in 2021



# National vs. Local Advertising Split

The split in allocation between national and local advertising continues to shift. The market directed roughly 85% of the total media spend on national efforts in 2022 – a 118% increase over 2021 national advertising spend.

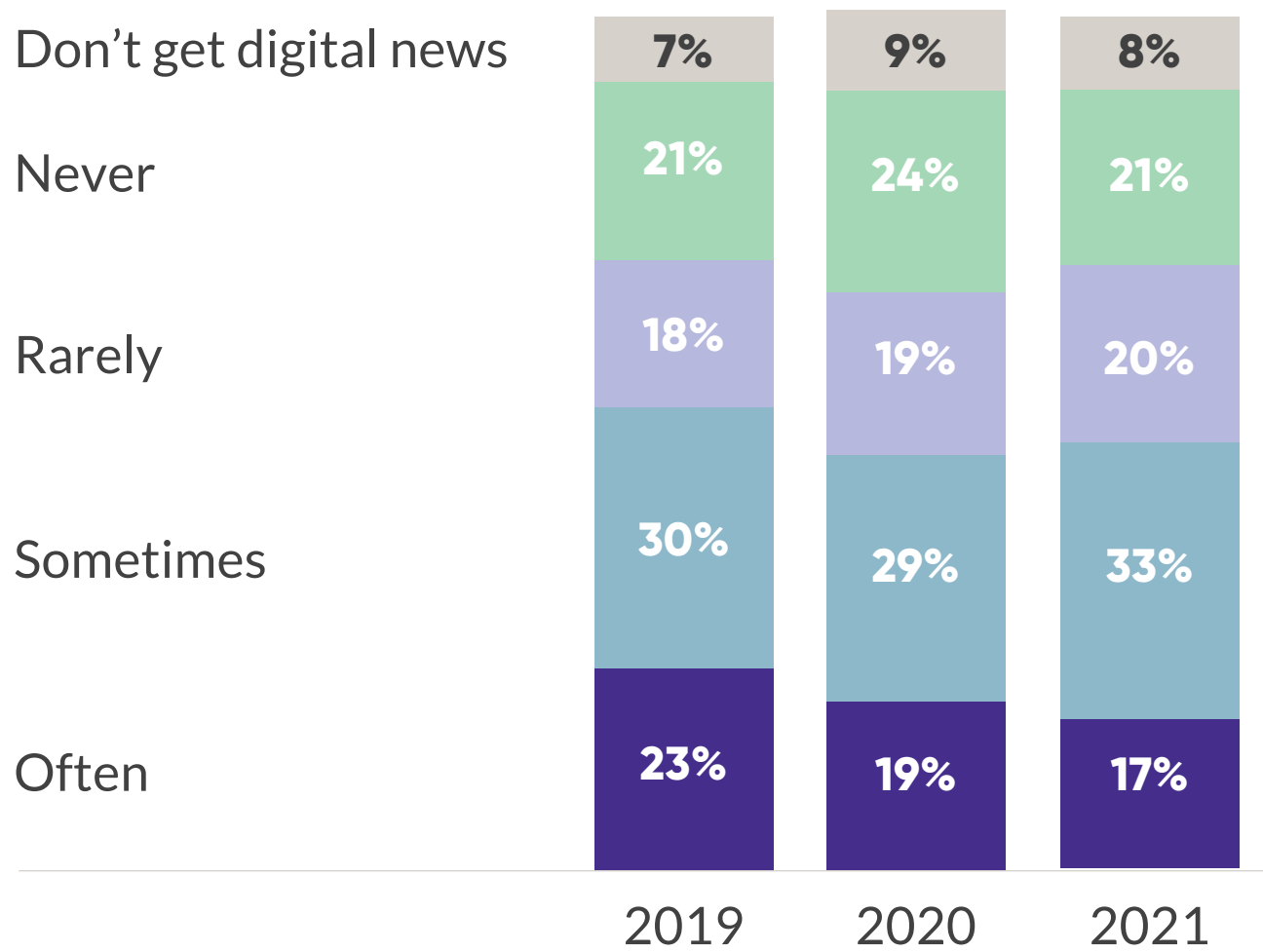




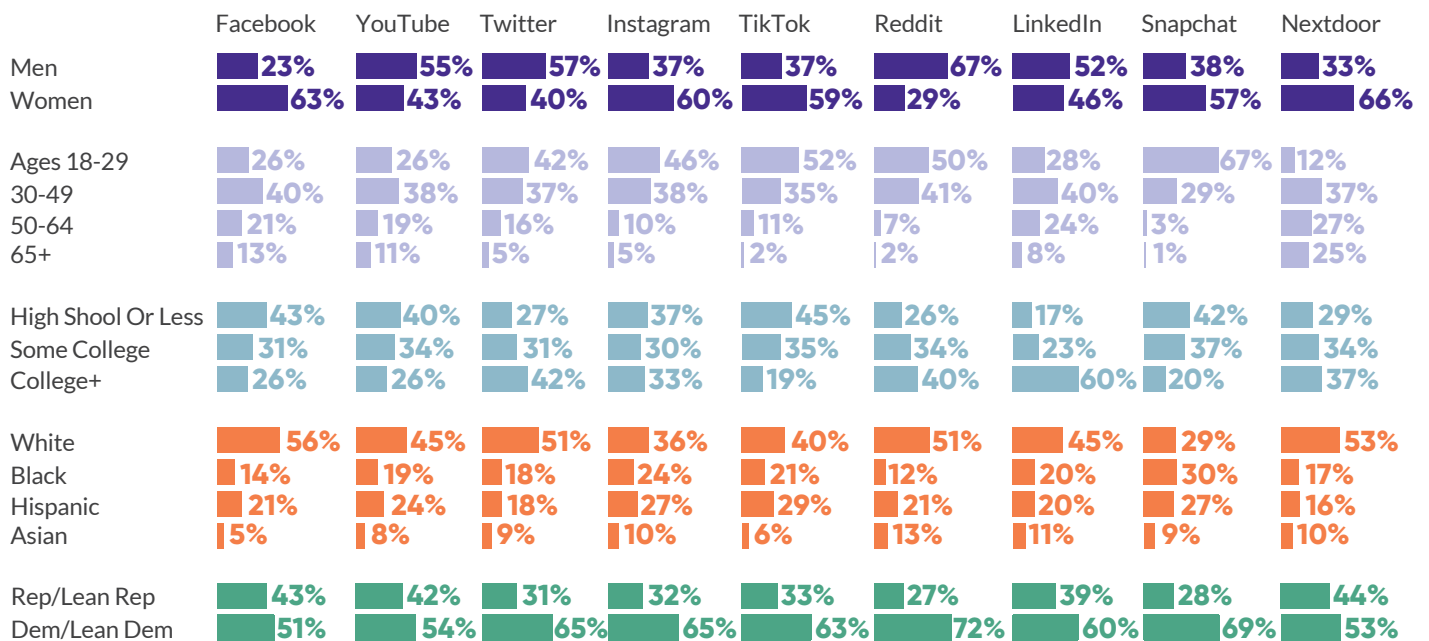


# Social Media Habits

More adults are turning to social media as a news source. However, fewer rely on social media “often”.



## Demographic profiles and party identification of regular social media news consumers in the U.S.



### Of those who indicated that they gather news from social media:

Of those who indicated they use Facebook to gather news, more identify as women than men. This is also true for Instagram, TikTok, SnapChat, and Nextdoor.

Men are more likely to use YouTube, Twitter, Reddit, and LinkedIn.

News gatherers across all social media sites skew younger. The majority on Facebook, YouTube, Twitter, Instagram, TikTok, Reddit, LinkedIn, Snapchat, and Nextdoor news gatherers are 49 or younger.

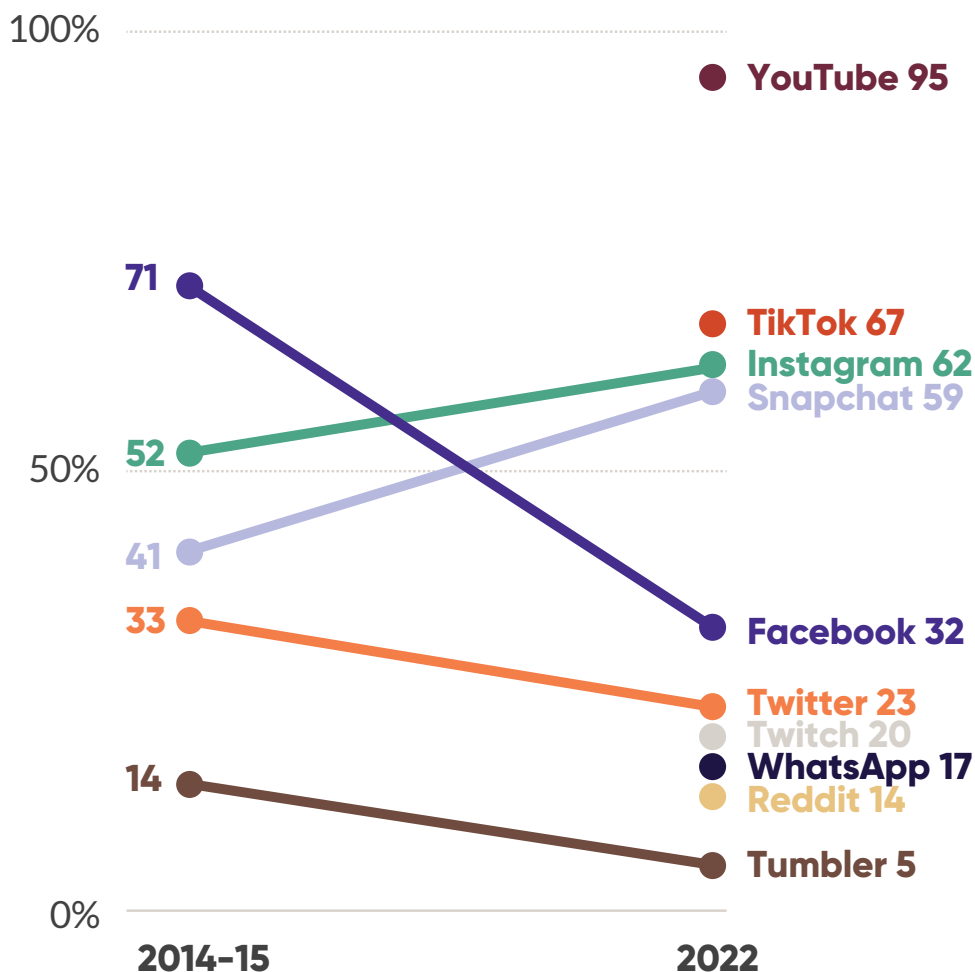




Since 2014, Facebook usage is down 40 percent among United States teenagers. This is also true for Twitter, though to a lesser extent. Other social media apps, specifically Instagram and Snapchat saw a rise in usage between 2014/15 and 2022.

Nearly all U.S. teens access YouTube, which is consumed by 95% of U.S. teens.

Newcomer TikTok, which debuted worldwide in 2018, is now used by two-thirds of U.S. teens; surpassing Instagram, Snapchat, Facebook, and Twitter.



Source: Pew Research Center, Teens, Social Media, and Technology, 2022



# Digital Marketing

## Average CPC Degree by Level

While year-over-year Cost-Per-Click (CPC) has remained relatively flat across our managed advertising campaigns, we’ve seen the highest growth in CPC for doctorate programs, and the biggest decline in cost for graduate certificates.

	2021	2022	% Change
Associate	\$13.94	\$13.61	-2.39%
Bachelor	\$9.22	\$9.20	-0.20%
Doctorate	\$10.12	\$12.20	20.52%
Graduate Certificate	\$7.13	\$5.46	-23.35%
Master	\$8.78	\$8.60	-2.04%
Undergraduate Certificate	\$7.77	\$7.92	1.92%
Grand Total	\$10.56	\$10.20	-3.37%

Source: EducationDynamics proprietary data 2021-2022



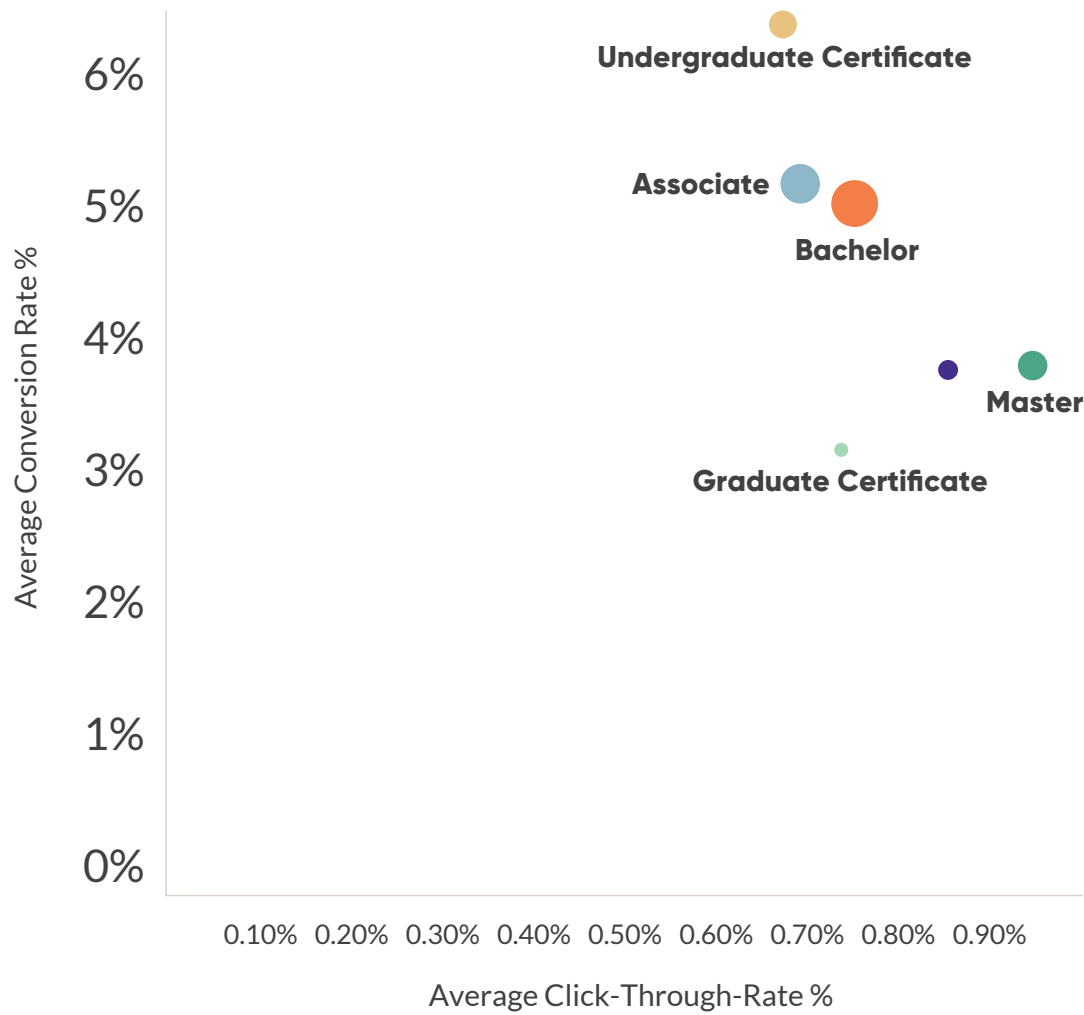
## Average CPC by Program Category

Across EducationDynamics partners, we’ve seen the largest increases to CPC rates for Criminal Justice, Fine Arts / Design, and STEM programs. The largest decreases were gained in Religious Studies, Public Affairs and Technology.

Program Name	2021	2022	% Change
Business	\$8.46	\$8.56	1.21%
Criminal Justice & Legal	\$9.45	\$10.29	8.80%
Education	\$8.17	\$7.77	-4.88%
Fine Arts & Design	\$7.94	\$8.49	6.93%
Health & Medicine	\$13.61	\$13.54	-0.53%
Liberal Arts & Humanities	\$9.30	\$9.16	-1.51%
Math, Science & Engineering	\$7.14	\$7.21	1.04%
Public Affairs & Social Sciences	\$11.58	\$10.93	-5.60%
Religious Studies	\$7.27	\$5.12	-29.50%
Technology	\$9.32	\$9.15	-1.81%
Vocational Training	\$8.87	\$7.60	-14.30%

Source: EducationDynamics proprietary data 2021-2022

# Average CTR and CVR by Degree Level

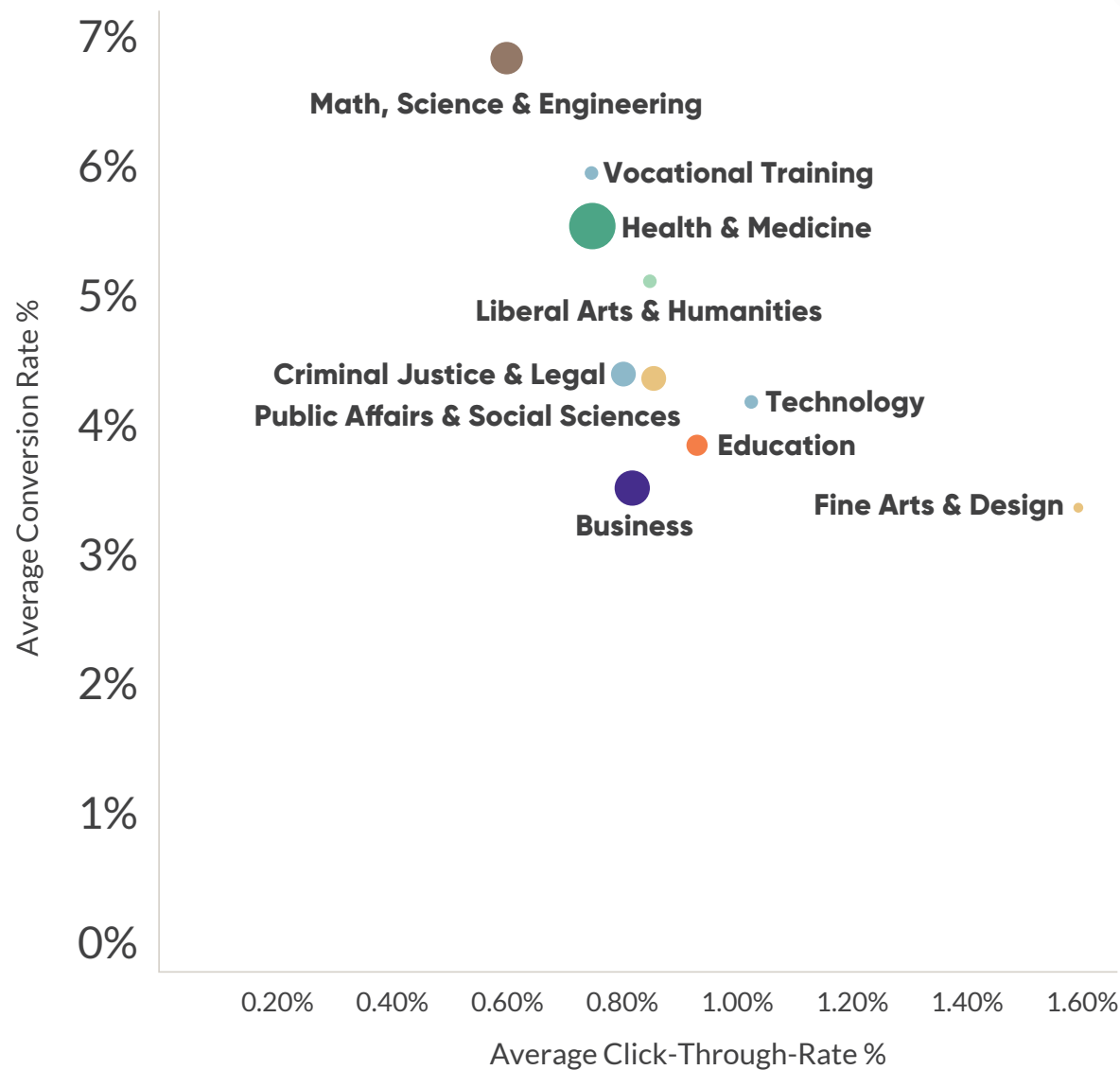


Source: EducationDynamics proprietary data 2022





# Average CTR and CVR by Program Category



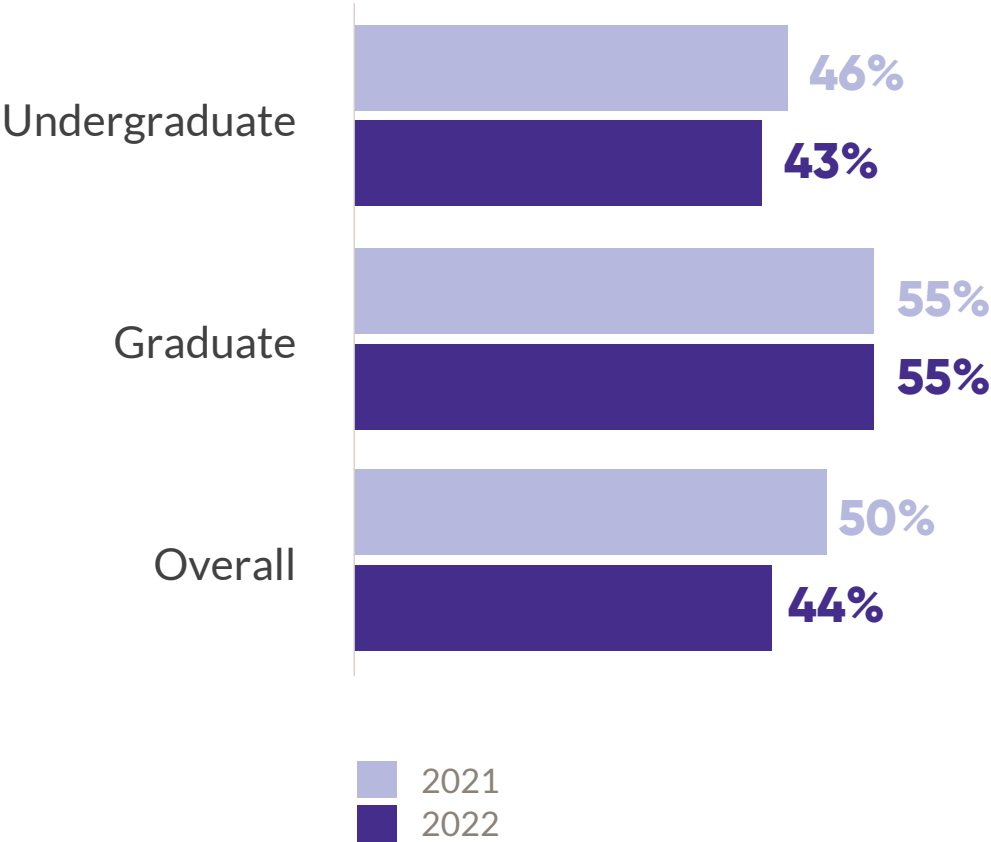
Source: EducationDynamics proprietary data 2022





## Enrollment Management

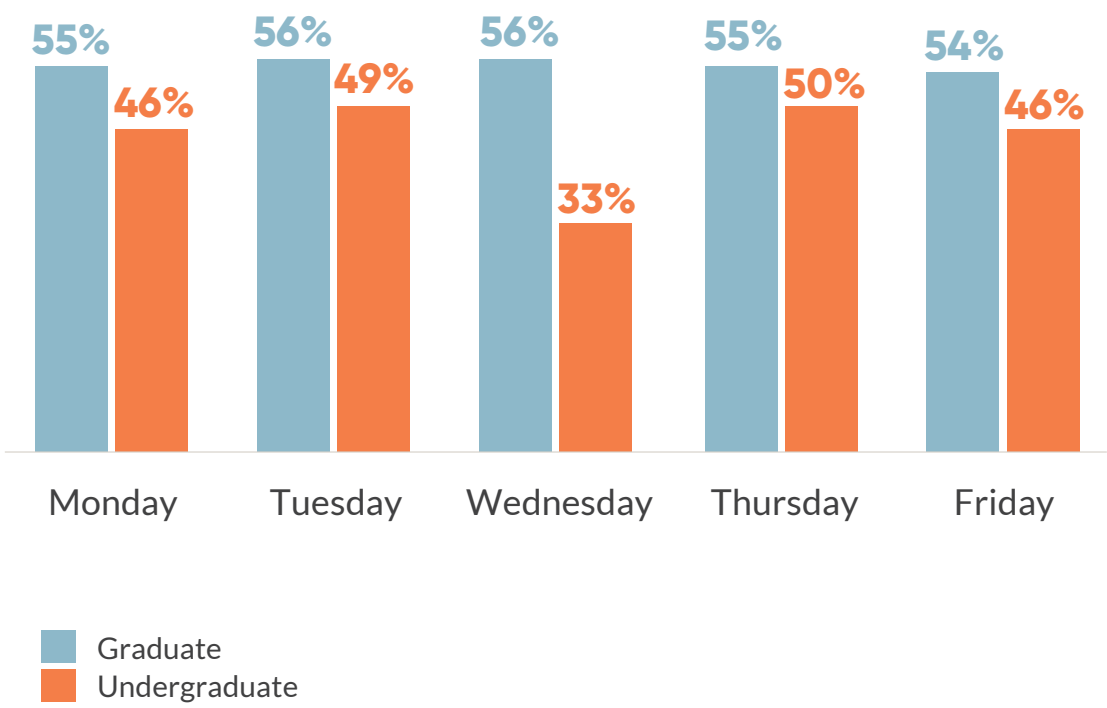
Average contact rates declined in 2022. Contact rates for graduate programs (55%) were slightly higher, while undergraduate program contact rates declined slightly to 43%.



Source: EducationDynamics proprietary data 2022

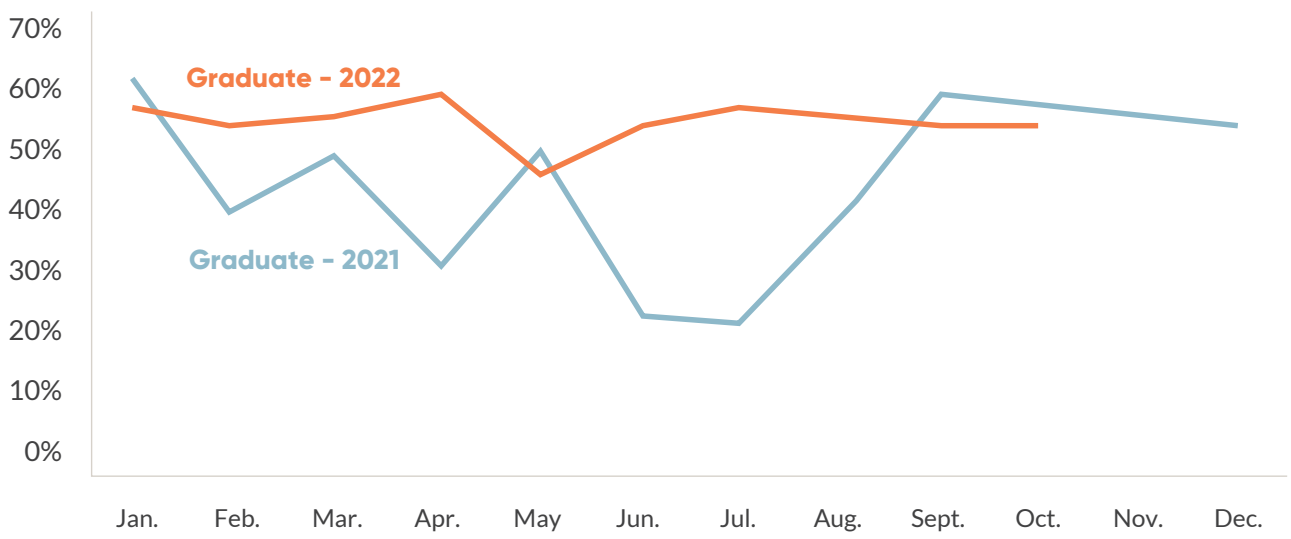


When evaluating contact rates by day of week, the performance of graduate programs sees vary little variance by day. However, we do see variances on the undergraduate side, where attempts to contact on Wednesday significantly underperform as compared to the rest of the week.

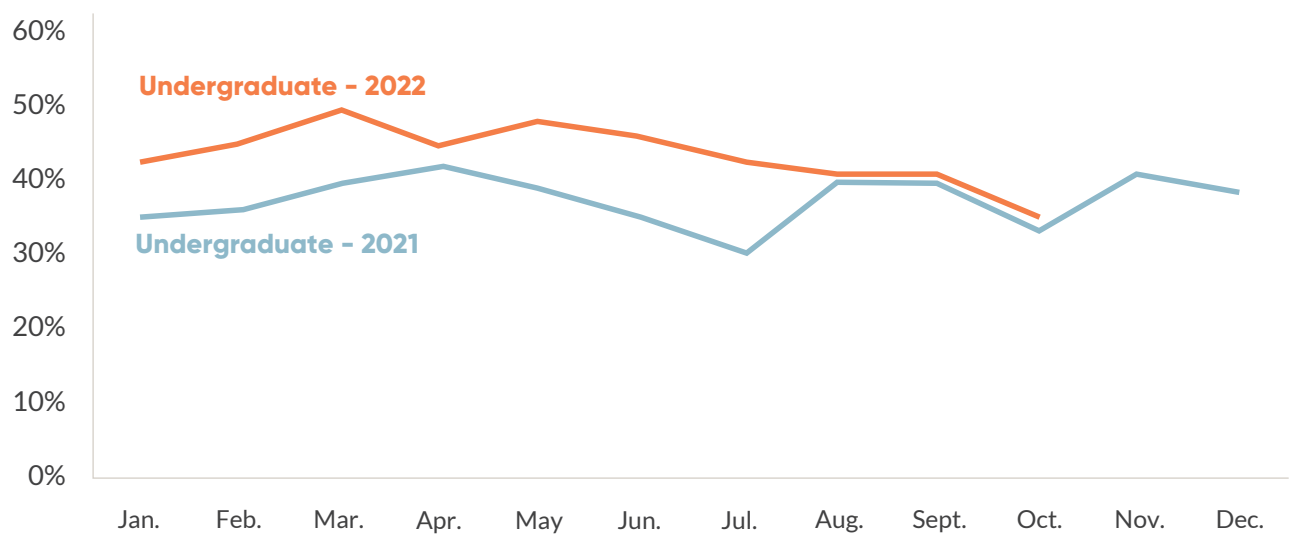




Whereas graduate program contact rates experienced significant volatility in 2021, the trend reversed in 2022 and was remarkably stable throughout the year.



Undergraduate contact rates also experienced very little volatility in 2022.

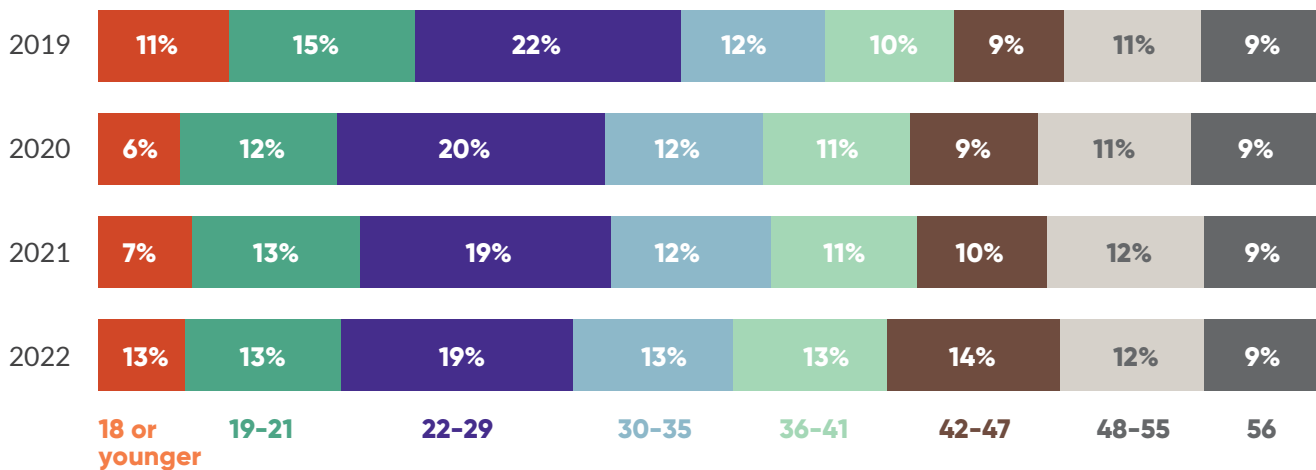


# Affiliate Marketing Channels

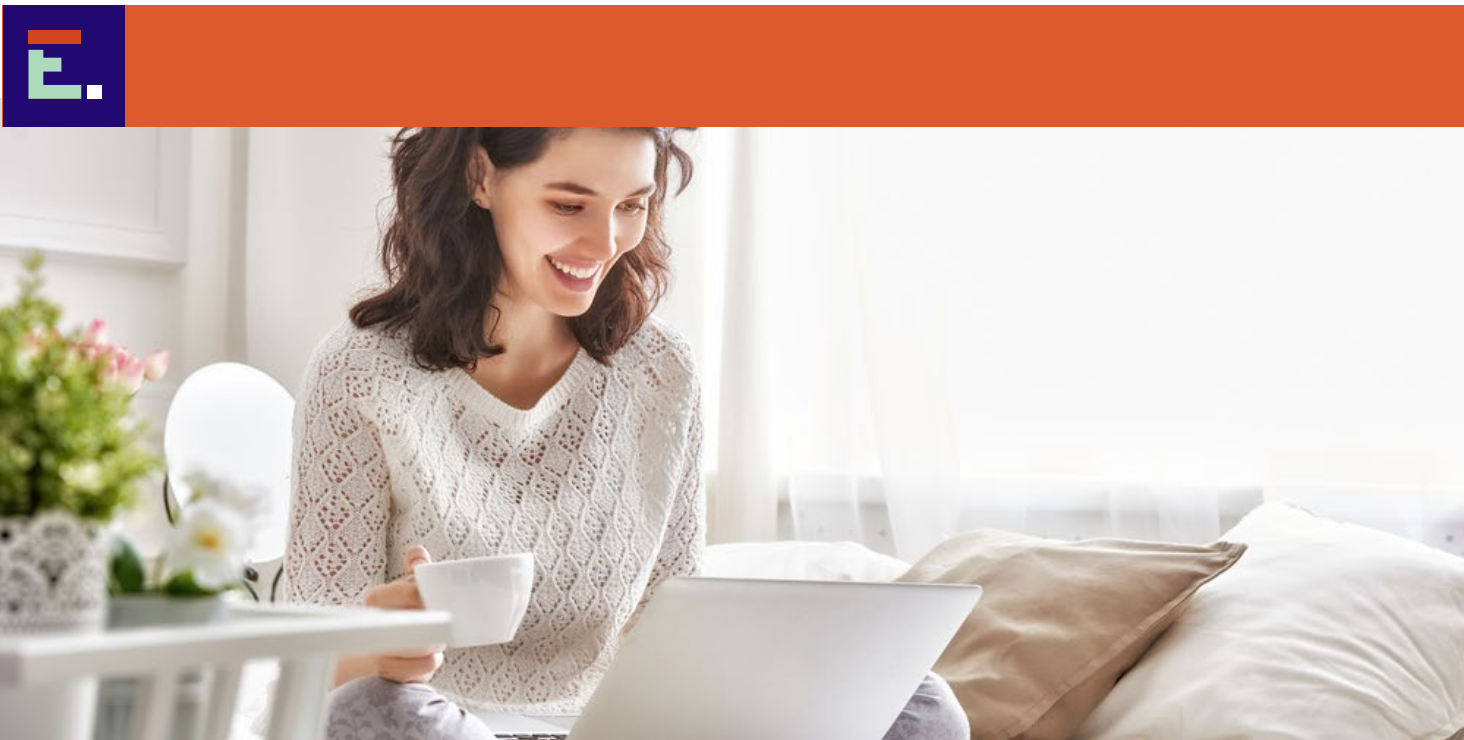
## Age of those who submit request on EducationDynamics portals

Younger prospective students are less likely to submit an inquiry in 2022 when compared to 2019. Those aged 35 and younger still comprise of the majority of inquiries generated, but the overall age of those who submit inquiries has gotten slightly older. The most significant erosion in inquiries is at the 22-29 age group, while there was an increase in the percent of submissions from those aged 42-47.

Submissions by Age



Source: EducationDynamics proprietary data 2019-2022





## Inquiry Submissions by Field of Study

Those fields of study generating the most inquiry submissions remained stable throughout 2022. Business inquiries generated the largest percent of submissions, followed by health & medicine, and public affairs & social services.

Category	Percent of Submissions		
	2022 Q1	2022 Q2	2022 Q3
Business	20%	20%	20%
Health & Medicine	16%	16%	15%
Public Affairs & Social Sciences	12%	12%	12%
Technology	11%	11%	11%
Criminal Justice & Legal	11%	11%	11%
Education	10%	11%	11%
Liberal Arts & Humanities	5%	5%	5%
Vocational Training	5%	5%	5%
Math, Science & Engineering	5%	5%	5%
Fine Arts & Design	3%	3%	4%
Religious Studies	2%	3%	3%
Education & Teaching	0%	0%	0%
Art & Architecture	0%	0%	0%
Computers & Technology	0%	0%	0%
Engineering	0%	0%	0%
Law, Military, Criminal Justice	0%	0%	0%



Among those interested in Business programs, graduate programs experienced a small increase in the percent of interest.

<b>Highest Level of Education</b>	<b>Percent of Submissions in Business Topics</b>		
	<b>2022 Q1</b>	<b>2022 Q2</b>	<b>2022 Q3</b>
Less than bachelor's degree	<b>19%</b>	<b>19%</b>	<b>19%</b>
Bachelor's Degree	<b>19%</b>	<b>19%</b>	<b>19%</b>
Greater than bachelor's Degree	<b>25%</b>	<b>24%</b>	<b>26%</b>

By U.S. region, interest in business topics (regardless of level of education) is relatively equal in the Midwest, West, and Northeast. The South shows slightly less interest in business topics.

<b>Region</b>	<b>Percent of Submissions in Business Topics</b>		
	<b>2022 Q1</b>	<b>2022 Q2</b>	<b>2022 Q3</b>
Northeast	<b>20%</b>	<b>20%</b>	<b>20%</b>
Midwest	<b>21%</b>	<b>21%</b>	<b>21%</b>
South	<b>19%</b>	<b>18%</b>	<b>18%</b>
West	<b>21%</b>	<b>21%</b>	<b>21%</b>

Interest in education topics is greater among those who have earned a bachelor's degree than those who have not earned a bachelor's degree.

<b>Highest Level of Education</b>	<b>Percent of Submissions in Education Topics</b>		
	<b>2022 Q1</b>	<b>2022 Q2</b>	<b>2022 Q3</b>
Less than bachelor's degree	<b>10%</b>	<b>10%</b>	<b>10%</b>
Bachelor's degree or higher	<b>13%</b>	<b>14%</b>	<b>13%</b>

Source: EducationDynamics proprietary data 2022



Health & Medicine, the second most requested topic, remained relatively stable across 2022.

	Percent of Submissions in Health & Medicine Topics		
	2022 Q1	2022 Q2	2022 Q3
Overall	16%	16%	15%
Less than bachelor's	16%	16%	15%
Bachelor's	15%	15%	14%
Greater than bachelor's	14%	14%	14%
Northeast	16%	16%	16%
Midwest	16%	15%	15%
South	15%	15%	15%
West	16%	16%	15%

Source: EducationDynamics proprietary data 2022



# Looking Forward in 2023

If we accept that transition and change will remain a constant in higher education for the foreseeable future, we must then also understand that this opens up new pathways and opportunities for both students and institutions.

To compete and survive in today's competitive higher ed landscape, institutions need to serve students 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 2023 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 students as they balance work, education, and other competing priorities.



## Key Takeaways

**Understand your market. Significant population shifts and demographic changes mean that national trends may not match your local or regional market.**

**Build student-centric experiences and processes that place an emphasis on understanding your student's needs and providing value at every stage of engagement.**

**Your website remains the hub of your brand. Invest the time, energy and resources necessary to ensure your website meets the expectations and needs of your prospective and current students.**

**Communicate your value clearly and concisely on your website and other digital platforms to support the significant research prospective students complete prior to first contact.**

**Balance and re-balance your media mix based on down-funnel performance. Find the optimal mix that includes awareness marketing efforts as well down-funnel strategies based on enrollments and graduation. The media mix of yesterday is not the optimal media mix of today or tomorrow, and the data is now available to continuously optimize for enrollment growth.**

**Maximize every opportunity to engage students while you have their attention. With a proliferation of options and shrinking attention spans, it is critical that you engage prospective students on their timeline, not force them to adhere to your schedule.**

**Artificial Intelligence, consumer sophistication and legal regulations are rapidly evolving. Embrace the increasingly complex nature of marketing and student engagement and find trusted experts to help you stay current and ahead of the competition.**

Although much has changed, the core of effective enrollment strategy remains the same – colleges and universities must meet students where they are with messaging that rings true. 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 2023

At EducationDynamics, we continuously monitor the higher education marketing and 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 enrollment? Speak with the experts that understand the student journey from consideration to graduation.**

**EducationDynamics.com**

