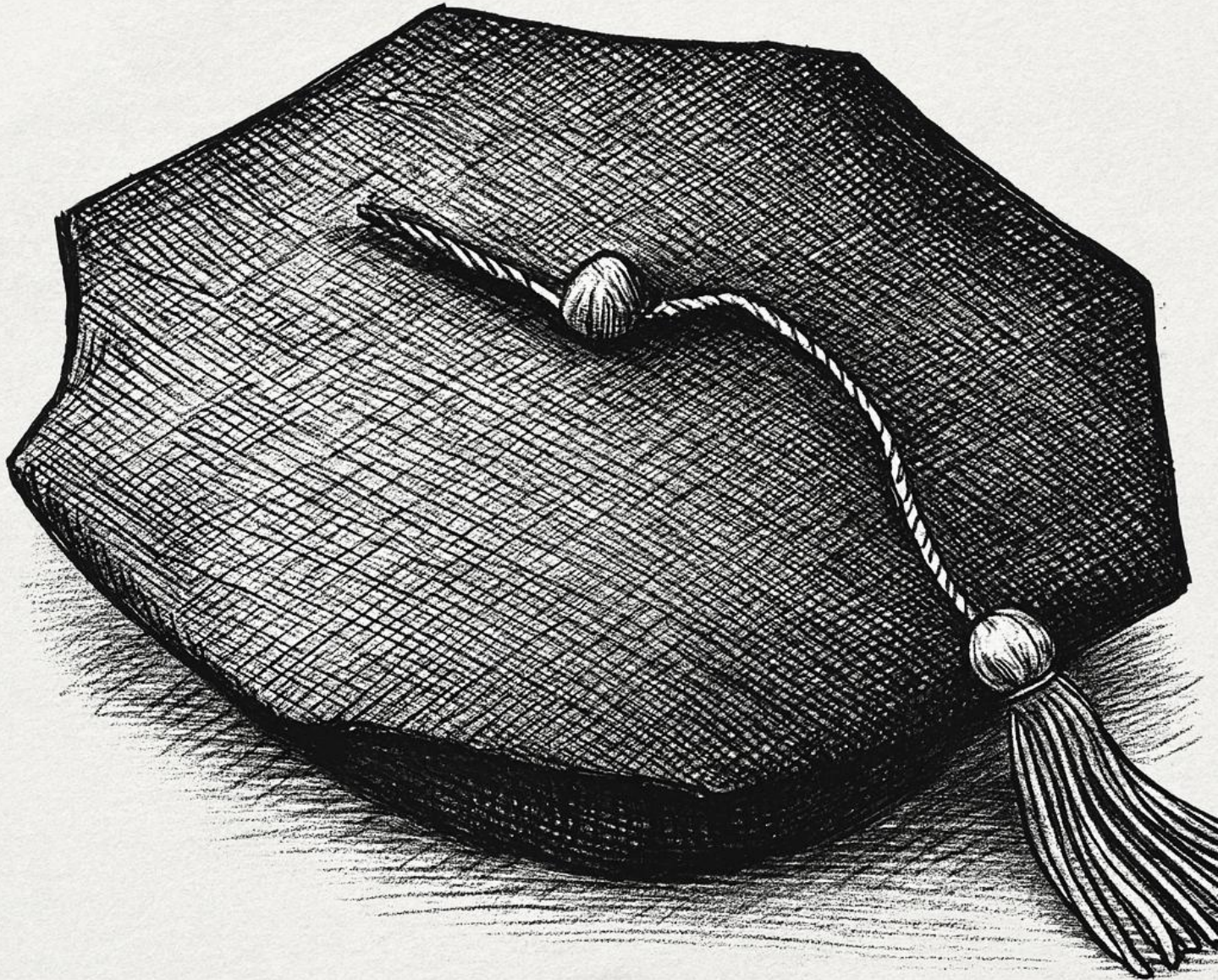


Attracting Domestic Doctoral Students

What institutions need to know to maximize domestic doctoral enrollment in 2025 and beyond.



Growing Domestic Doctoral Enrollment

Introduction

As institutions think strategically about enrollment health in 2025 and beyond, there are many things to consider and many actions to take. With the long-discussed enrollment cliff now at the doorstep, institutions will put increasing emphasis on growing their online student population, their adult undergraduate student population, and their graduate student population.

While these audiences will eventually feel the ripple-effect of the declining numbers of 18-year-olds that is now driving the undergraduate enrollment cliff, that is a considerable distance in the future. Why? Consider that the average age of a graduate student is 33 and the average age of an online student is 29.

Given the wide age distribution of these student populations (in comparison with the traditional undergraduate population, which is heavily dominated by 18-year-olds), U.S. institutions can leverage these alternative audiences as steady and secure enrollment targets for years to come.

A Focus on Domestic Students

U.S. institutions also face another challenge: significant declines in international student enrollment lasting for years to come. NAFSA has projected that as many as 130,000 fewer international students may show up for the Fall 2025 semester. Even with indicators suggesting smaller declines, recent reliance on a growing international market are not likely to continue.

This is a particularly serious challenge at the graduate level given the robust growth of international graduate education between 2021 and 2024. [*IIE Open Doors 2024*](#) reported that in the 2023-24 academic year, more than 500,000 students from around the world filled our graduate classrooms – annual growth of more than 35,000, and the largest graduate international enrollment ever recorded. The [*National Student Clearinghouse*](#) indicates that overall graduate enrollment rose by 2.1 percent, calculated to be more than 65,000 additional new graduate students. This likely indicates that just about half of the new graduate students in fall 2024 were international students.

In the face of considerable international student contraction, U.S. institutions must ensure that they have refined the strategies and tactics that will attract domestic students.

Graduate programs have become increasingly dependent on international students

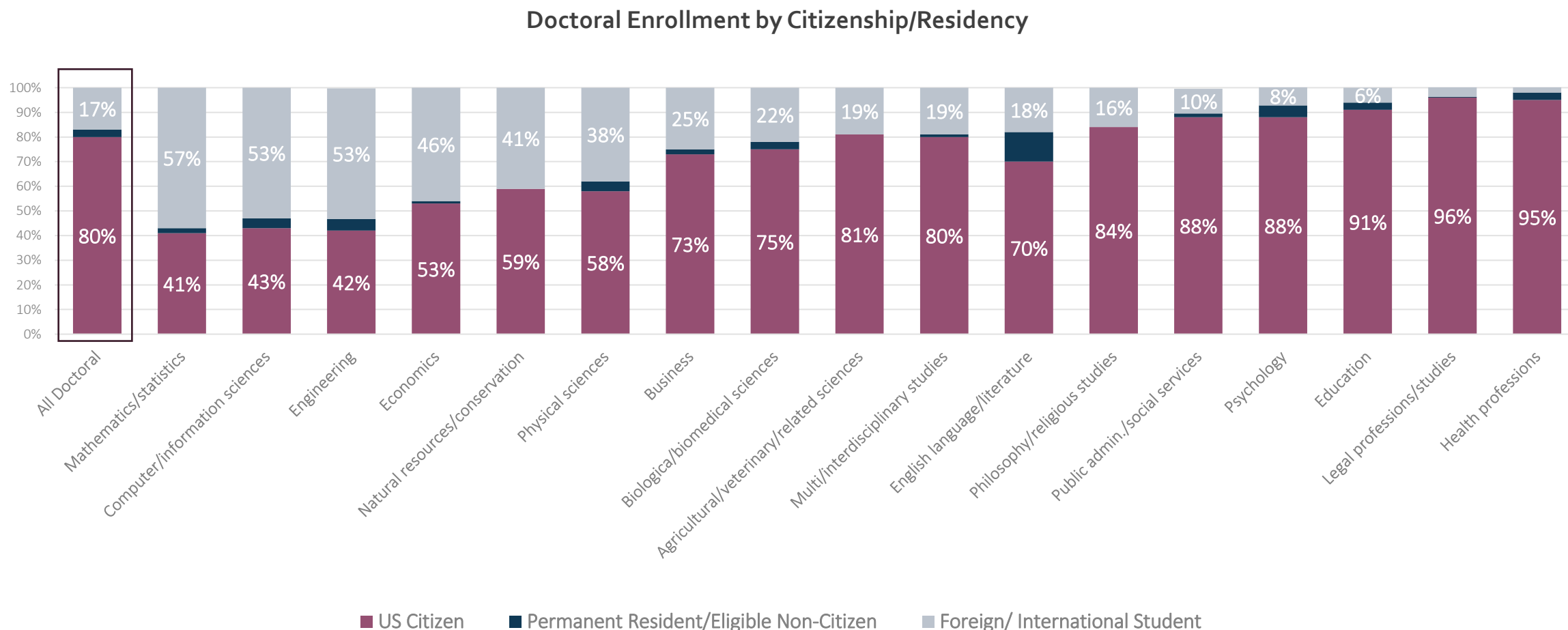
...and we are likely approaching a period similar to that following the 2016-17 peak.



❖ In 2024, approximately half of new graduate enrollment was derived from international students.

Doctoral programs in analytical fields are most likely to be over-relying on international students

...In three critical disciplines, international students comprise more than half of total enrollment.



Growing Domestic Doctoral Enrollment

The Doctoral Audience

Many institutions across the U.S. are over-relying on international students to fill their doctoral programs, particularly among institutions with a heavy STEM focus. Institutions have developed sophisticated recruitment processes to attract these students and have been savvy in building relationships in countries from which they develop ongoing streams of students. This resulted in more than 149,000 international students enrolled in U.S. doctoral programs (and more than 350,00 in master's programs) in 2023-24.

But *Open Doors* historical data indicate that the last serious decline in international graduate student enrollment began four years before the pandemic in 2016-2017. Between that time and 2020, nearly 17,000 fewer international students decided to enroll at U.S. institutions (the previous peak in international graduate enrollment had been in the 2016-17 academic year with a total of 391,000 students). Then the pandemic resulted in 45,000 fewer international students enrolling in 2020-21.

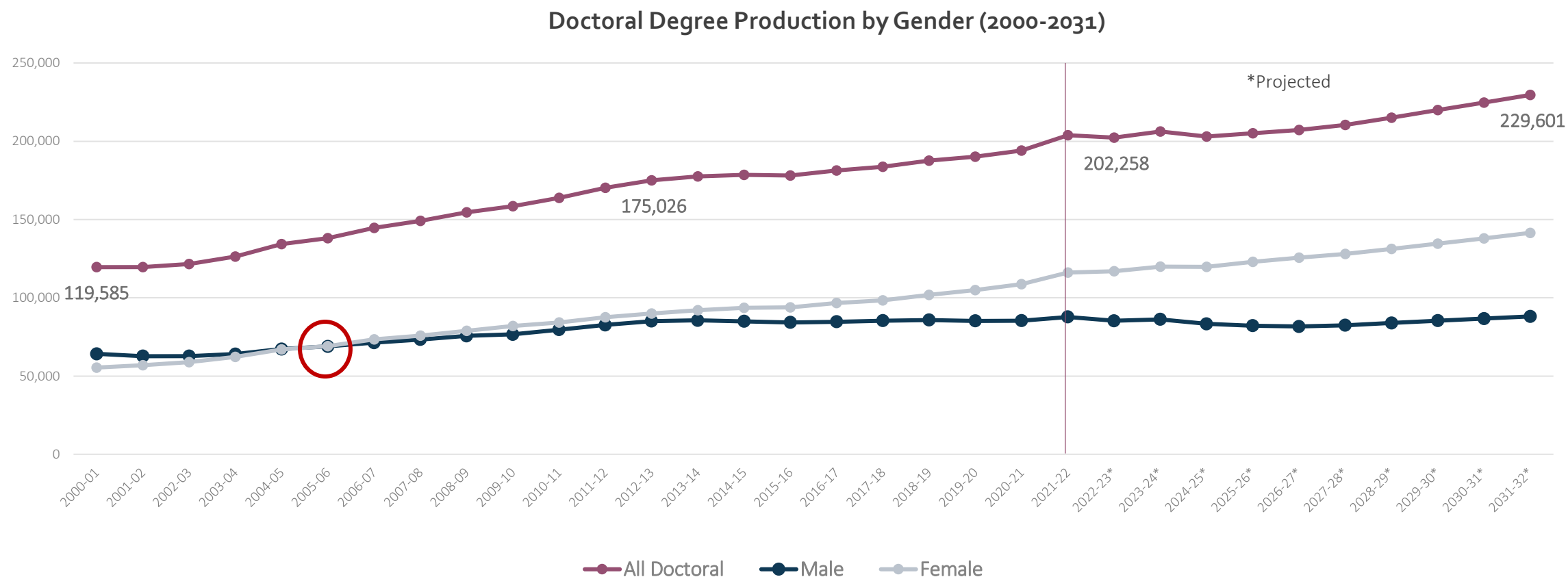
Growth: The doctoral audience has grown considerably over the last two decades. Between the 2000-01 and 2022-23 academic years, doctoral degree production grew by 69 percent (more than 202,000 degrees in 2022-23). In the decade preceding 2022-23, degree production grew by 20 percent, and IPEDS projects that doctoral programs will continue to increase degree production over the coming decade but at a lower rate of growth (13 percent).

Growth by Gender: Prior to 2005-06, males dominated doctoral programs. Since the 2005-2006 academic year (when female doctoral degree production reached 50.1 percent), women have increasingly dominated the doctoral market. In 2022-23, they comprised 57.8 percent of all degrees earned, with IPEDS projecting that they will comprise 61.4 percent by the end of the current decade. Institutions seeking domestic growth will need to not only better understand the motivations and expectations of the domestic market in general but the perspective of women seeking a doctorate.

Note that IPEDS data do not separate domestic and international students, but they are nonetheless important to understanding the doctoral market. In the appendix of this report, we present similar data—not domestic-specific—on degree production by discipline.

Doctoral degree production is strong and is increasingly driven by women

...albeit at a slower rate in the coming decade (12%) than the last decade (19%).



How to Maximize Domestic Doctoral Enrollment

Attracting Domestic Students

During my time at RNL, we conducted a major market research study for a prestigious school of engineering, seeking to better understand the differences in the motivations, decision making priorities, competitive sets, and program preferences of their domestic and international doctoral audiences.

Key findings from that study indicated a host of significant differences between the two audiences, each of which with a set of serious implications for recruitment and enrollment practices.

Domestic students were:

1. **Far more likely to be interested in hybrid (albeit not fully online) study.**
2. **Far more driven to enroll in order to advance their career – and make more money.**
3. **Far more likely to be planning to earn their doctoral degree on a part time basis.**
4. **Far more likely to be considering other regional institutions —and *not* considering other prestigious engineering schools.**

In 2023, RNL also conducted a national survey of more than 1,500 prospective, enrolled, and recent graduate students. Approximately 10 percent of respondents were doctoral students, and they have allowed me to use this sample to better understand what doctoral students expect of the institutions and programs that interest them, and those in which they enroll.

In what follows, we present 10 critical, data-driven, findings related to doctoral preferences and expectations. Before we review these, we present the following “To Do” list.

How to Maximize Domestic Doctoral Enrollment

To-Do List

- 1. Know your audience:** Ensure that marketing, recruitment, enrollment, and academic stakeholders have a firm understanding of the expectations and preferences of domestic students seeking doctoral study. While there are multiple ways to profile these needs, a parallel survey of non-enrolling domestic applicants and enrolled students or a parallel survey of domestic and international applicants and enrolled students can help lay a strong foundation.
- 2. Understand your competition:** Unlike international students who typically consider a set of programs across the United States, domestic doctoral students are often “time-bound/place-bound” in that they have jobs and families that do not allow them to move to enroll in a specific program. While you may be among the most prestigious programs in a given discipline, domestic students are likely to be looking at other programs in the region that will work with their competing life priorities.
- 3. Raise your awareness:** If you searched “doctoral programs/(discipline or subject)/near me,” would your programs appear at the top of search results? If not, invest in organic search engine optimization (SEO) and regularly attend to it. Because doctoral students are less likely to click on digital ads than other student audiences, SEO is even more important to growing domestic enrollment. Although it may seem counterintuitive that local students would need a search to know you have a given program, market studies indicate that this is frequently the case.
- 4. Send the right message(s):** International students have a variety of reasons to enroll in prestigious programs in the U.S., but domestic students are especially likely to enroll to advance their careers—like all other domestic graduate audiences. Blend messages that combine career success with quality and reputational messages in order to connect with their aspirations and motivations. And don’t forget to be clear from the “top of the page” on how you can help them manage the costs associated with doctoral level study.

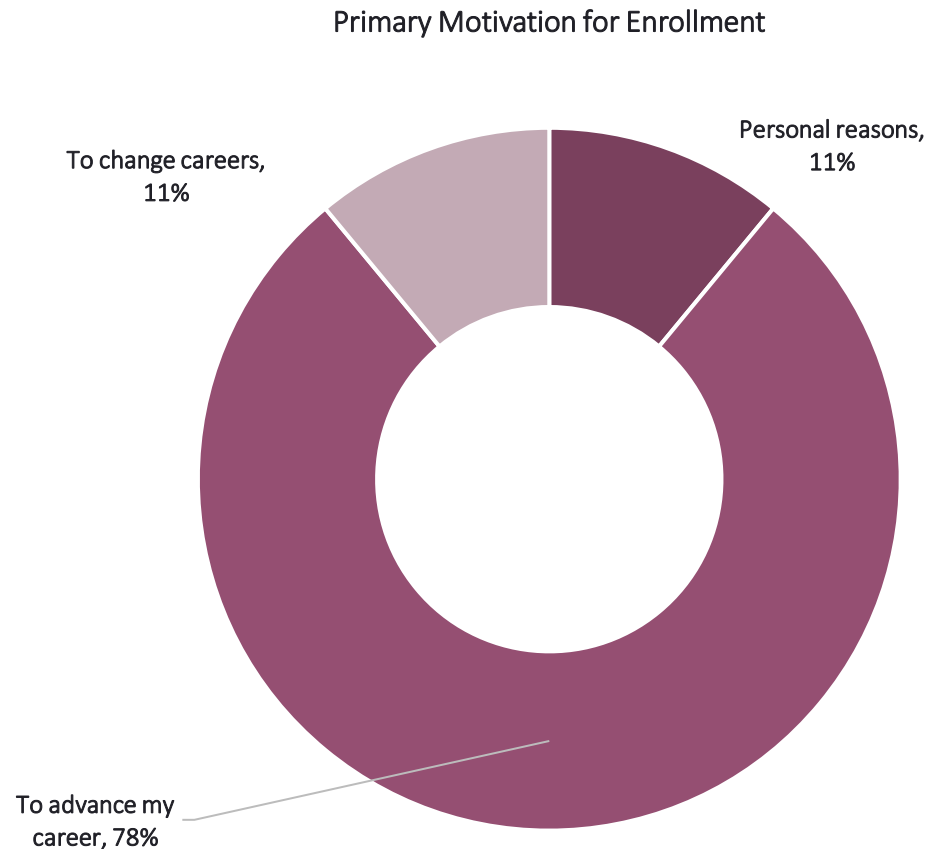
How to Maximize Domestic Doctoral Enrollment

5. **Be prepared to respond quickly:** Domestic doctoral students are split between preferring contact with a recruiter or program faculty/staff. This presents a challenge when considering that they expect a prompt response (minutes or hours) and that a slower-than-expected response diminishes interest. Faculty and program staff have other pressing duties, and as such, doctoral programs need to work out a cadence that allows a recruiter to respond in a timely manner and serve as a conduit to a program leader.
6. **Consider adding a hybrid/blended option:** Because domestic doctoral students are often seeking to study while working, there is considerable interest in partially online programs (while demand for fully online is minimal). Programs seeking to grow domestic enrollment should consider the creation of a hybrid/blended option that reduces time on campus while retaining the rich interaction that is expected in doctoral-level programs. They should also ensure that programs aimed at domestic students can be completed on a part-time basis.

They enroll in order to advance their careers.

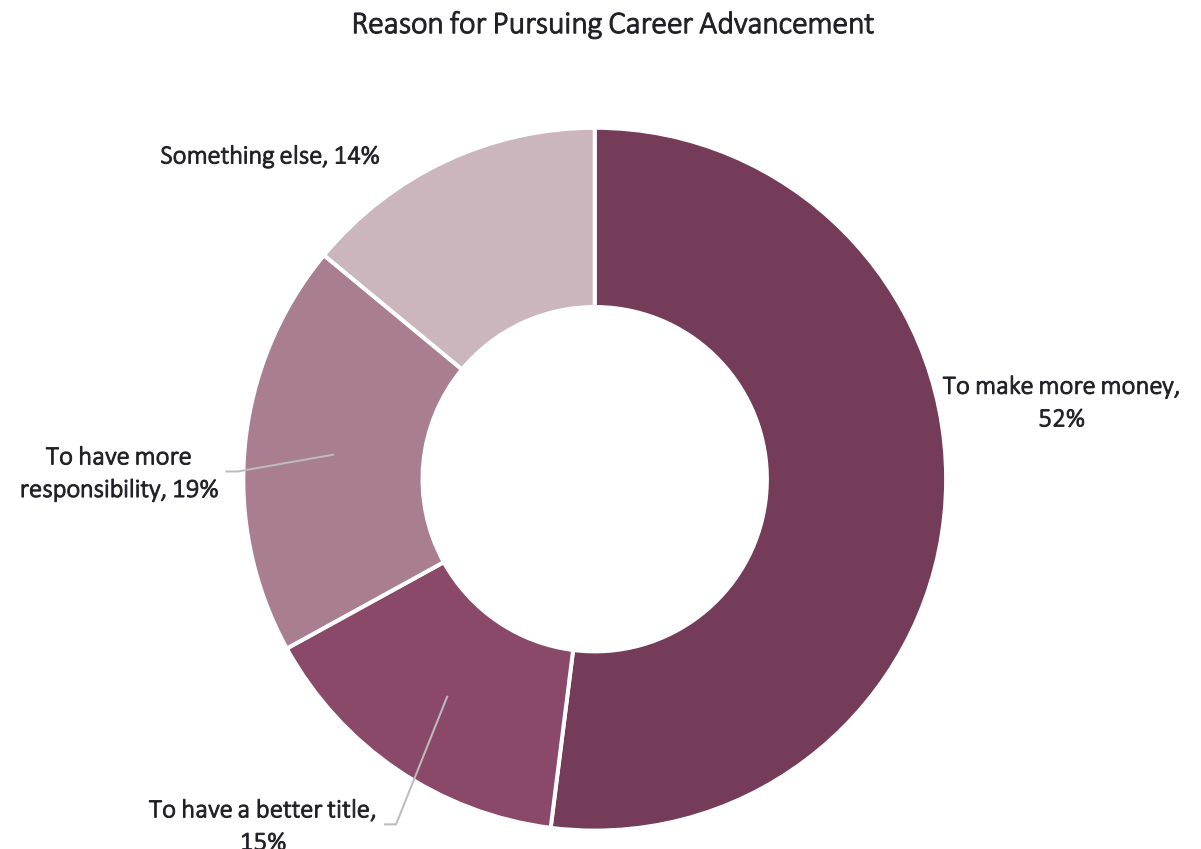
Finding

More than three-quarters of domestic doctoral students indicate that they enroll to advance their careers, with a heavy emphasis on their interest to make more money.



Action

Doctoral programs seeking to grow domestic student enrollment must ensure that both positioning language and curriculum reflect students' focus on leveraging such a degree to advance their careers. Creating cohesive messaging is critical to success.

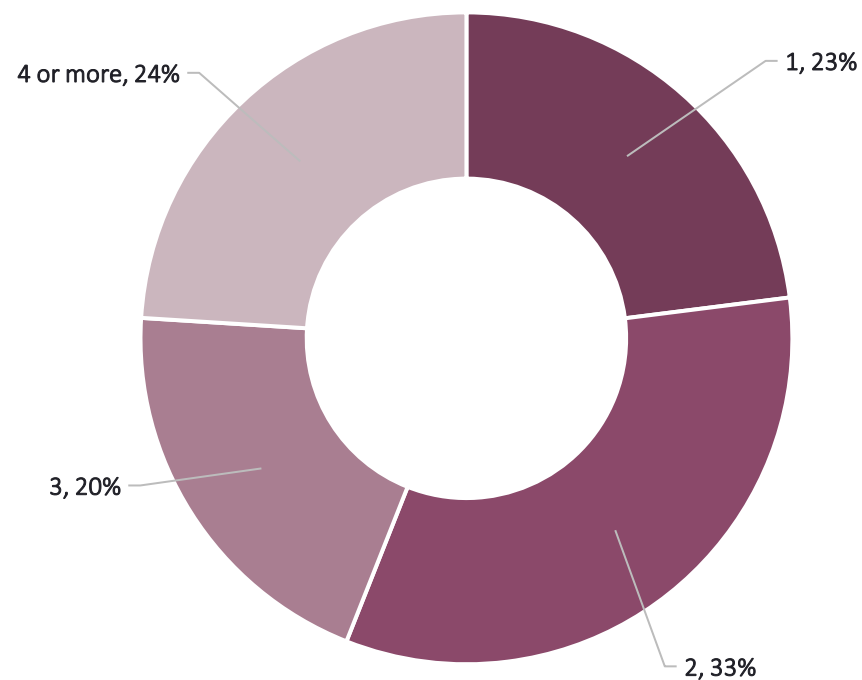


They apply to multiple programs—close to home.

Finding

Most domestic doctoral students apply to more than one program, with nearly one-quarter applying to four or more. More than half limit themselves to programs within 50 miles. They are not looking at programs across the nation.

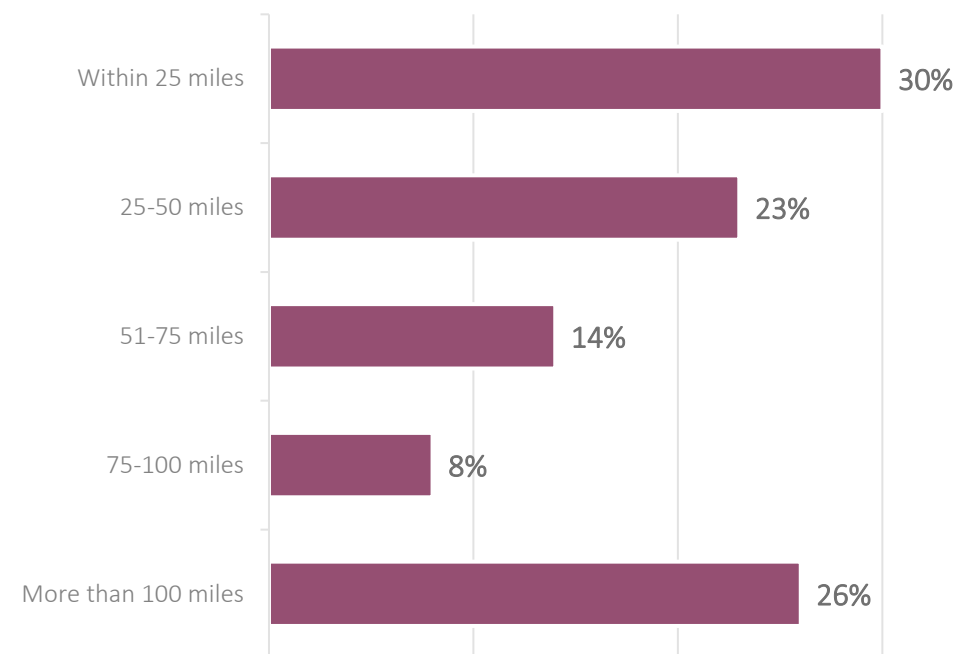
Number of Programs Applied To



Action

Increasing domestic doctoral enrollment requires institutions to have in-depth knowledge about similar programs in region and then being able to differentiate their offering in terms of factors that are important to domestic students.

Distance From Furthest Program Applied To



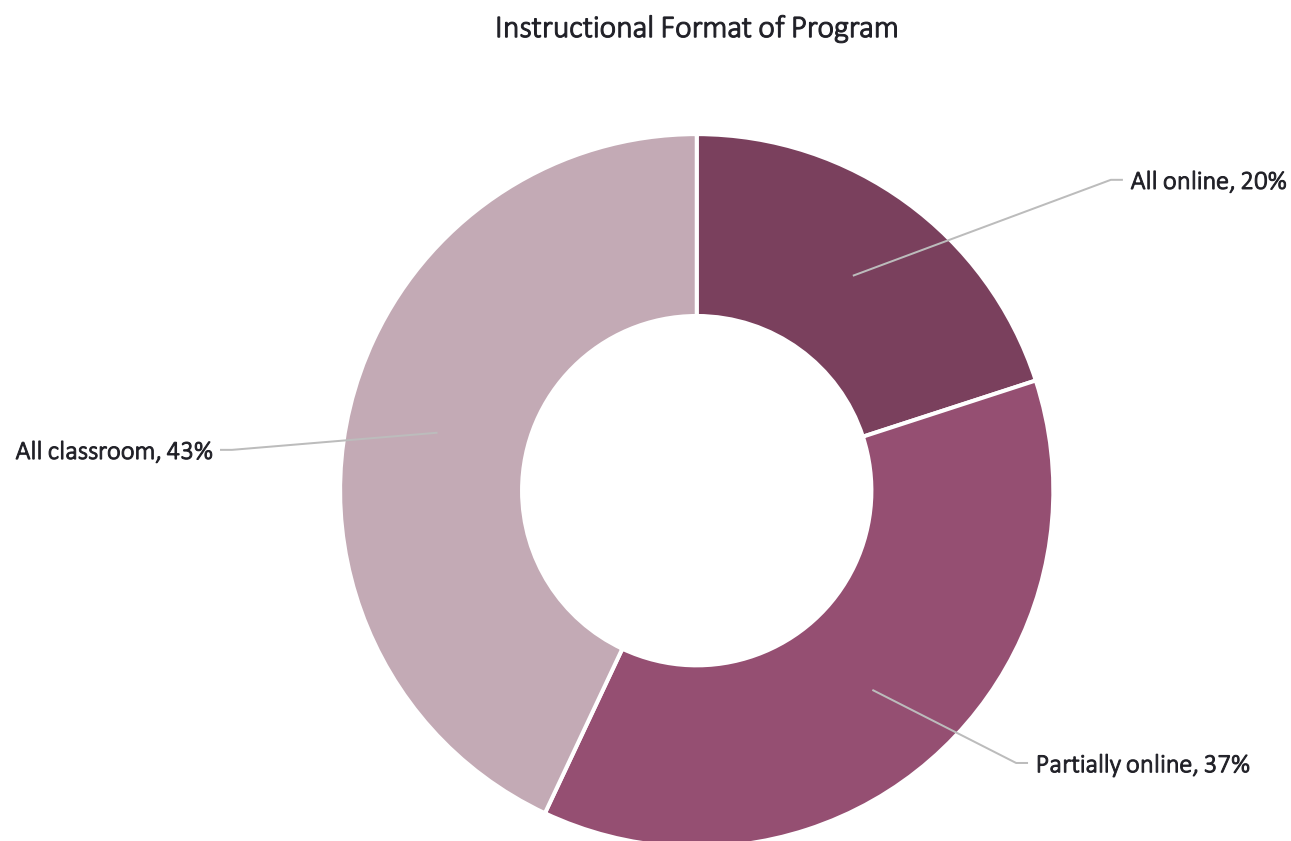
They choose classroom and hybrid programs.

Finding

Domestic doctoral students are primarily interested in classroom or partially online programs, but only 20 percent seeking a fully online programs. These patterns are almost a perfect inverse of domestic master's student preferences.

Action

Growing domestic student enrollment may require doctoral programs to consider offering hybrid/blended versions of their programs that can be completed on a part-time basis. Large-scale development of online programs is unlikely to be necessary.



They search for programs of interest online.

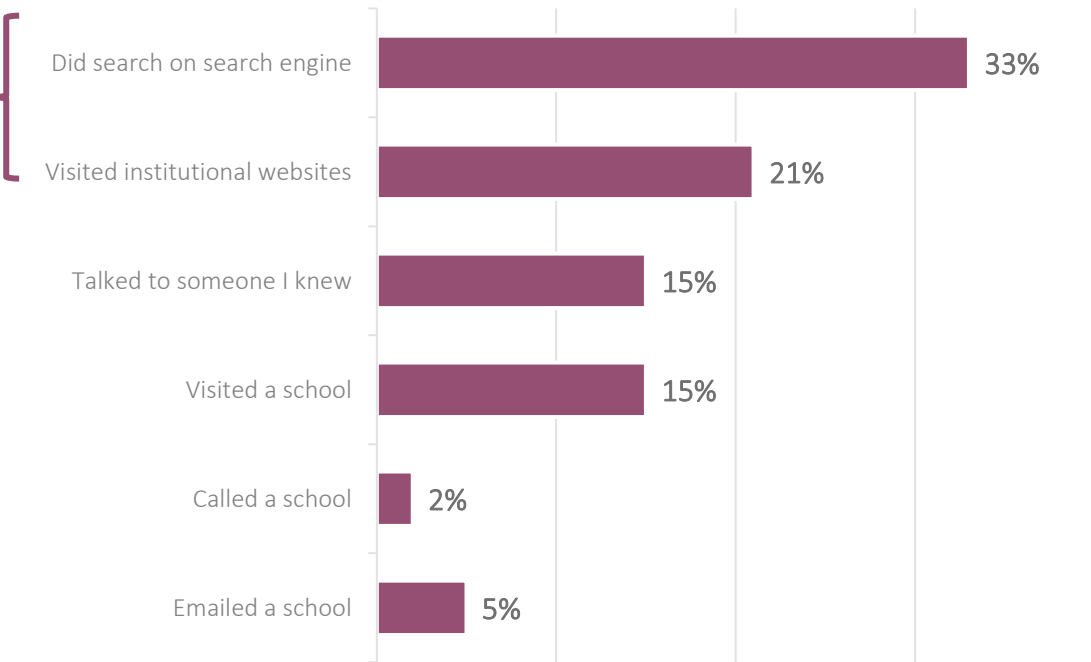
Finding

Domestic doctoral students search for programs just like all other student levels today—online. More than 80 percent use a search engine as their first or second step and four of the five most common sources are digital.

Action

Growing domestic doctoral enrollment will require programs to ensure that they are visible on all digital resources that students of all types use to find programs of interest. Rising to the top of organic search results is of paramount importance.

First Step in Program Search



Other Early Steps in Program Search

Other Early Steps in Program Search	
Institutional websites	52%
Search engines	50%
Printed rankings guides	28%
Other websites	21%
Videos on YouTube or elsewhere	18%
Ads on websites	18%
Ads on social media sites	16%
Print materials from institutions	16%
Ads on streaming TV	15%

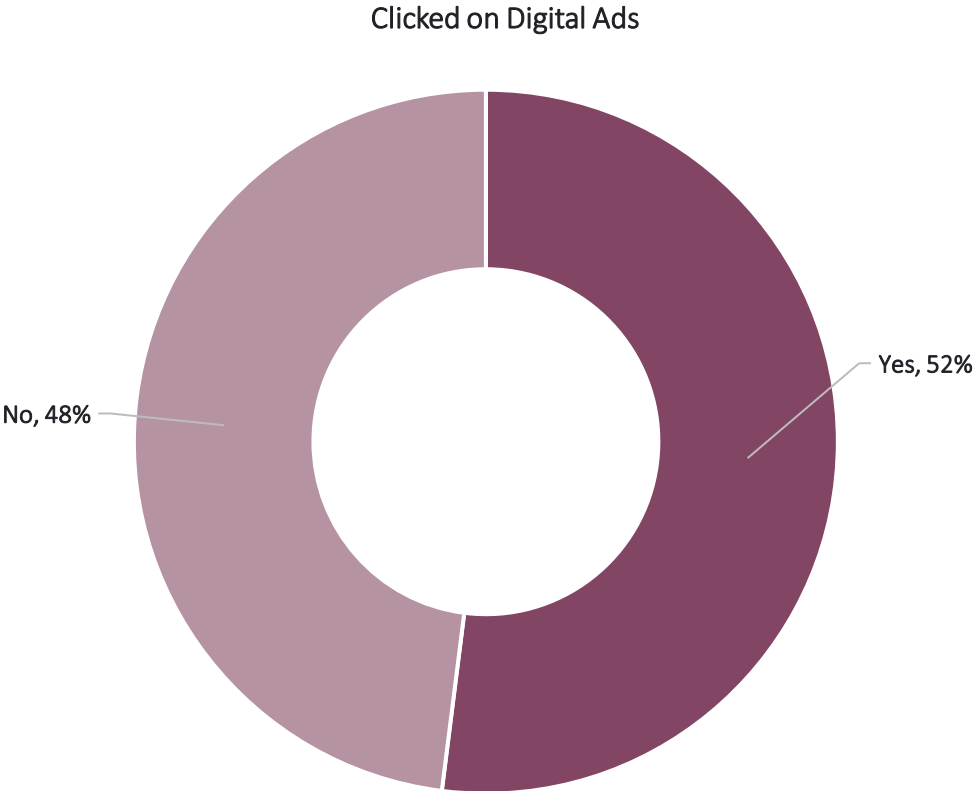
They rely on digital media sources and click on ads.

Finding

Domestic doctoral students click on digital ads, albeit not at the rates of master’s students. This means that while paid digital marketing is essential, it must be paired with organic search engine optimization.

Action

Marketing strategy aimed at domestic doctoral students should blend both paid digital marketing with organic search engine optimization, with an emphasis on SEO, but also a paid strategy that surfaces leads and moves students through the funnel.



Reason for Clicking on Digital Ads	
It was for a school I am interested in and reminded me to take the next step.	37%
I didn't know about the school and wanted to learn more	24%
The ad “copy” was intriguing to me and made me want to click	21%
I’m aware of this school but didn’t know anything about their programs	19%

They require personal attention for varied questions.

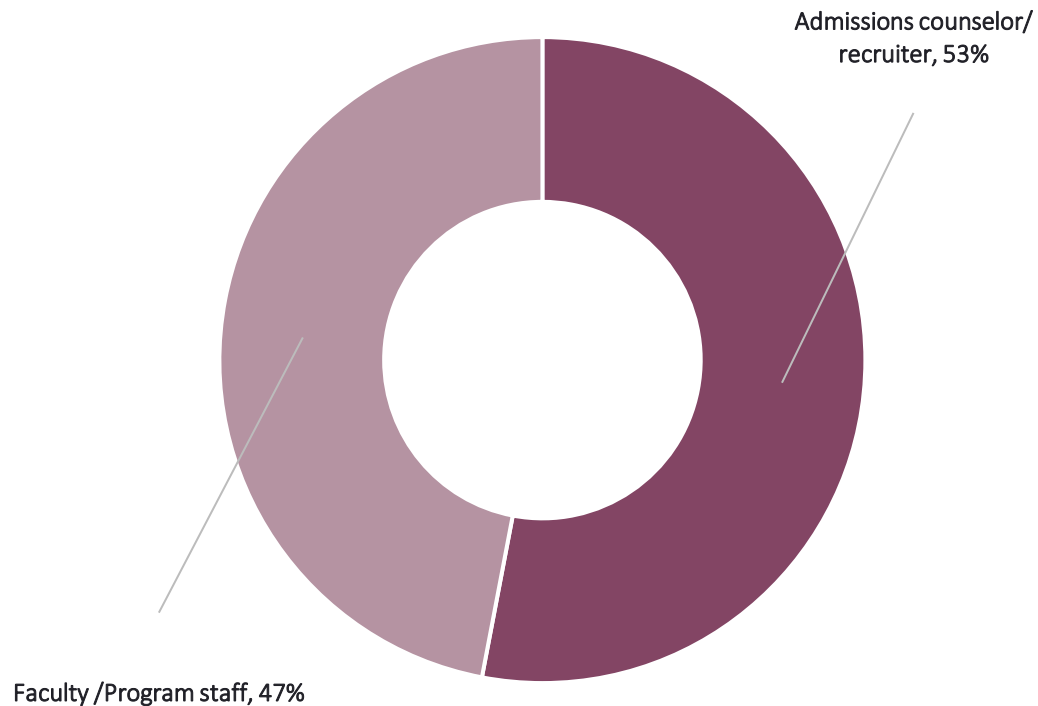
Finding

Domestic doctoral students are more likely than master's students to prefer contact with faculty or program staff, and their early questions blend practical and detailed program information.

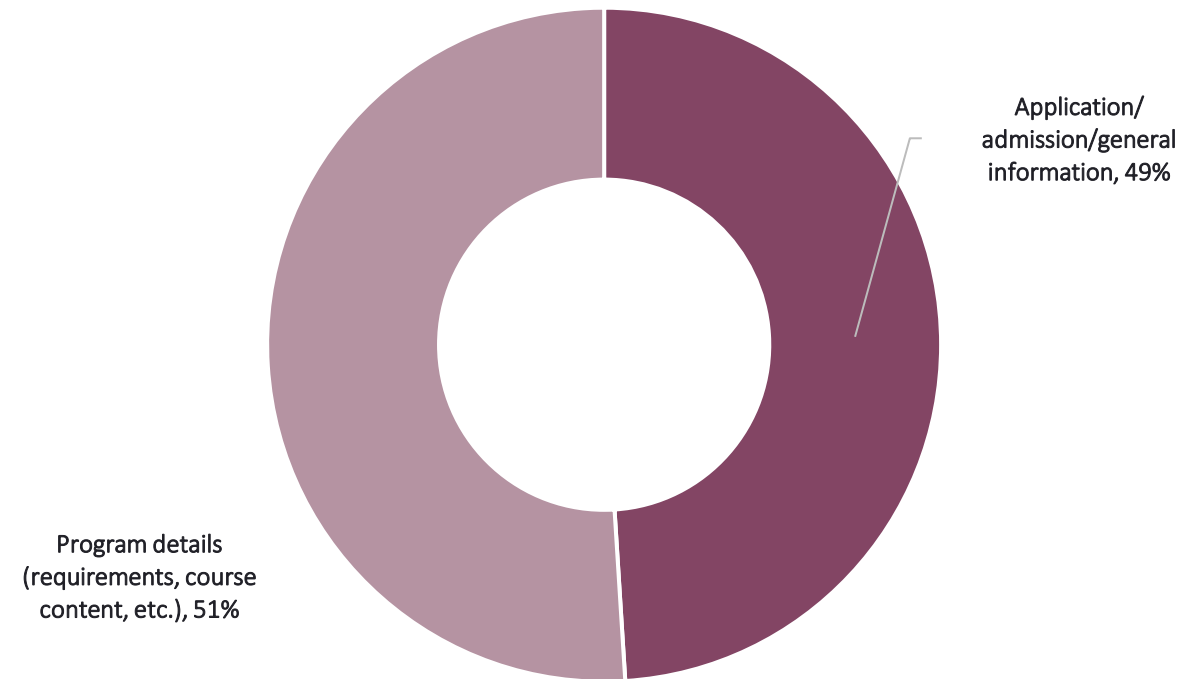
Action

A cultivation strategy aimed at domestic doctoral students, like international, requires significant contact being led by program staff and leadership. Recruiters can be used to connect with students, but they serve as a conduit rather than primary resource.

Preferred Program Contact



Focus of Early Inquiries



They expect timely response via personalized email.

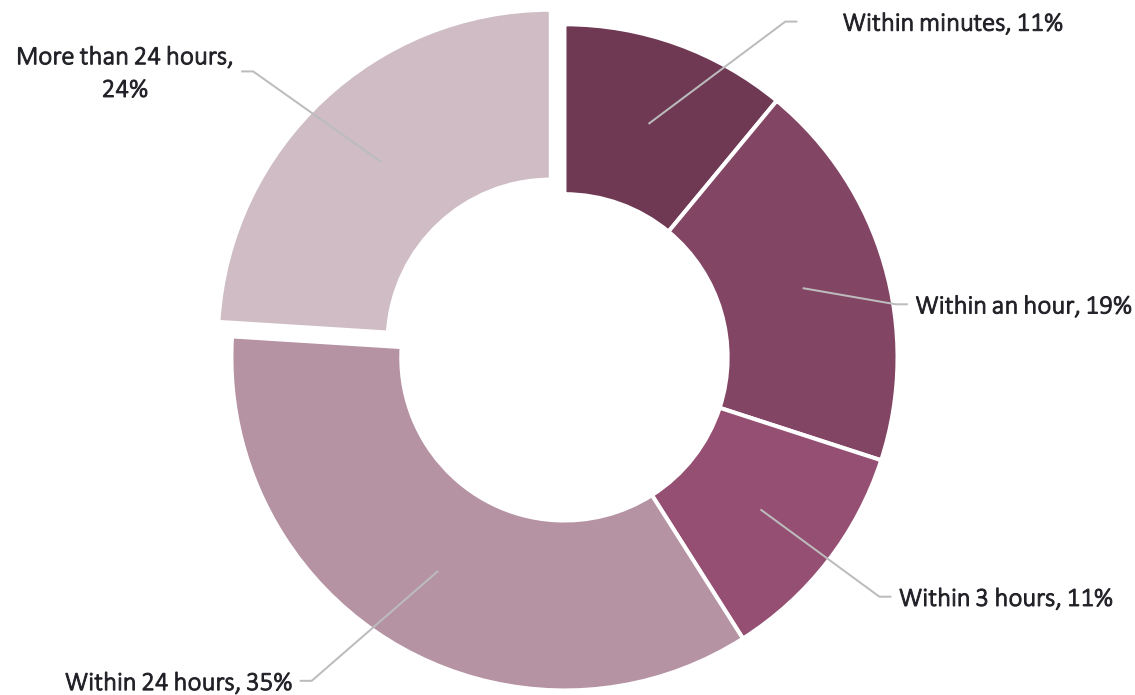
Finding

Domestic doctoral students are just as likely as all other graduate students to expect a personalized response to inquiries and questions within minutes or hours rather than hours or days.

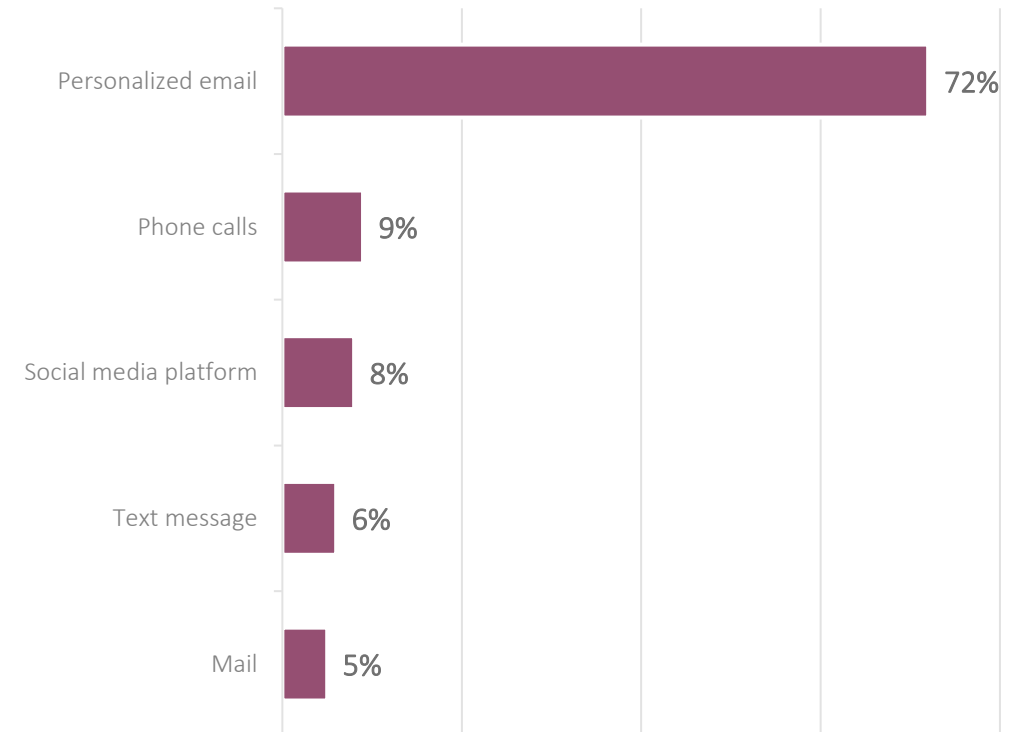
Action

Whether those assigned to respond to domestic doctoral student inquiries and questions are recruiters or program faculty/staff, they need to respond within minutes or hours (same day) if they are to not lose domestic students to more responsive programs.

Expected Response Time



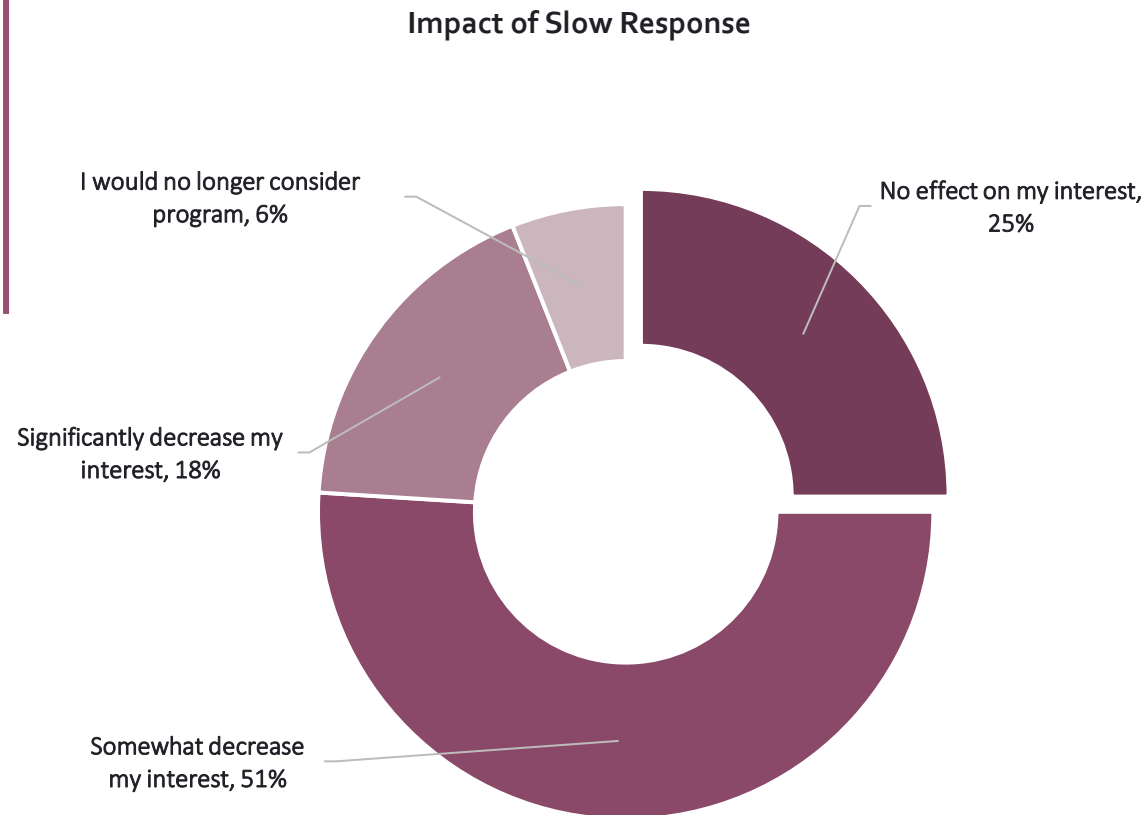
Preferred Communication Method



They react negatively to slow responses.

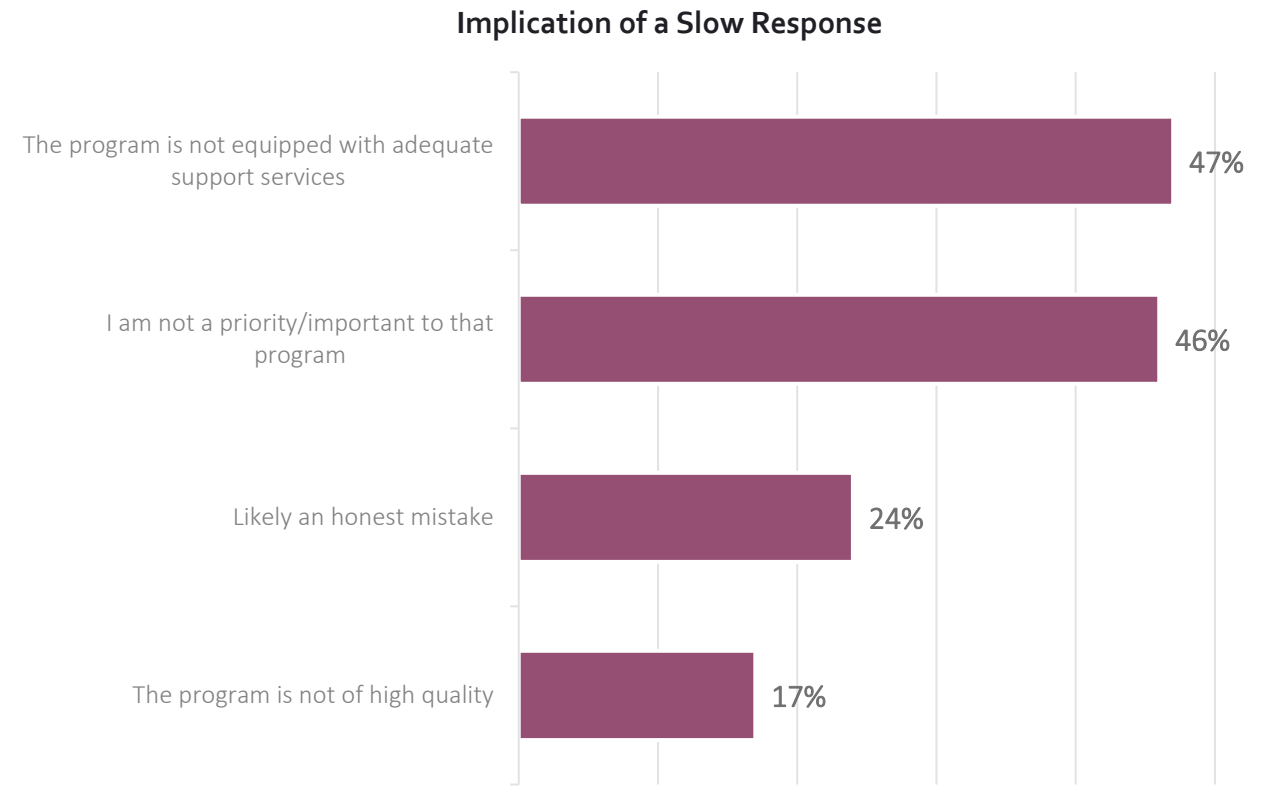
Finding

Domestic doctoral students become less interested in programs with which they experience slower than expected response times and are likely to think that a slow response indicates that they are not important to the program.



Action

Leadership will likely have to share data that indicate the negative reactions/implications of slower-than-expected response to ensure that those responsible for contact fully understand the vital importance of prompt response in enrollment growth.



They prioritize cost, employment, and reputation.

Finding

Just like all other graduate students, domestic doctoral students most often prioritize cost of tuition and future job opportunities in their enrollment decisions. Unlike master's students, they also prioritize the reputation of the program or institution over other factors such as flexibility and campus location.

Action

Messaging and marketing of doctoral programs aimed at domestic students should emphasize methods to defray the cost of enrolling, the career opportunities available to doctoral graduates, and the reputation/quality of the program. This will require a reordering compared with positioning focused on international.

Importance of Factors in Enrollment Decision	Not important	Neutral	Important
Cost	4%	27%	79%
Future employment opportunities	2%	20%	78%
Academic reputation	2%	25%	74%
Financial aid/scholarship opportunities	3%	23%	74%
Campus location (close to work/home)	6%	34%	60%
Flexible course options (online, evening, etc.)	10%	33%	57%
Personalized attention prior to enrollment	10%	42%	44%
Recommendations from family/friends/employer	11%	55%	34%
Size of institution	15%	58%	27%

They are less concerned about total cost.

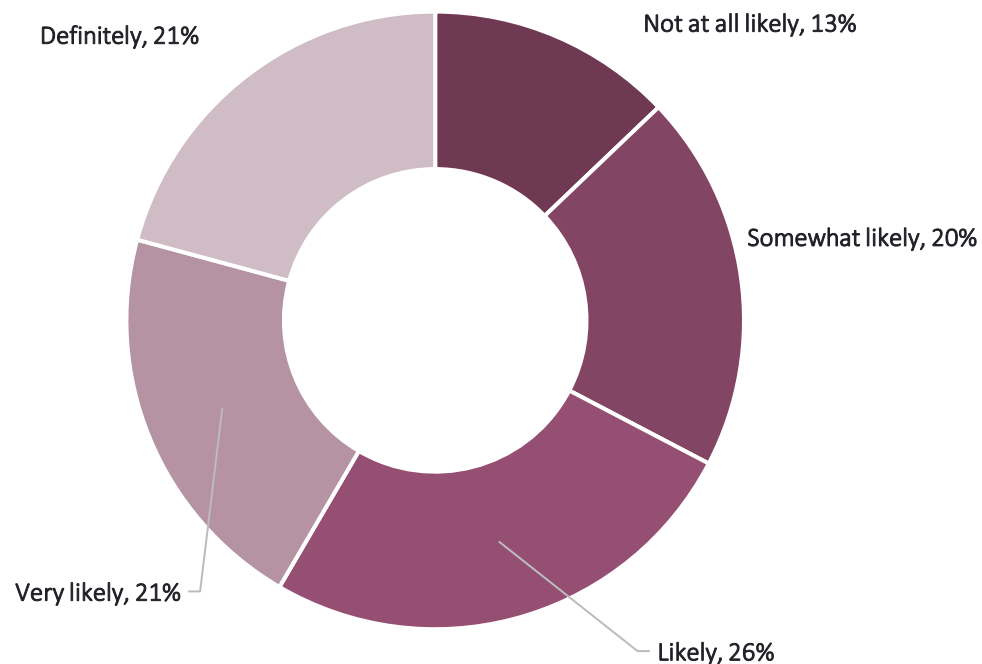
Finding

Domestic doctoral students are less likely to remove programs with high sticker prices from their consideration set than are master's students, and they are more likely to enroll in a more expensive program if it is the highest quality.

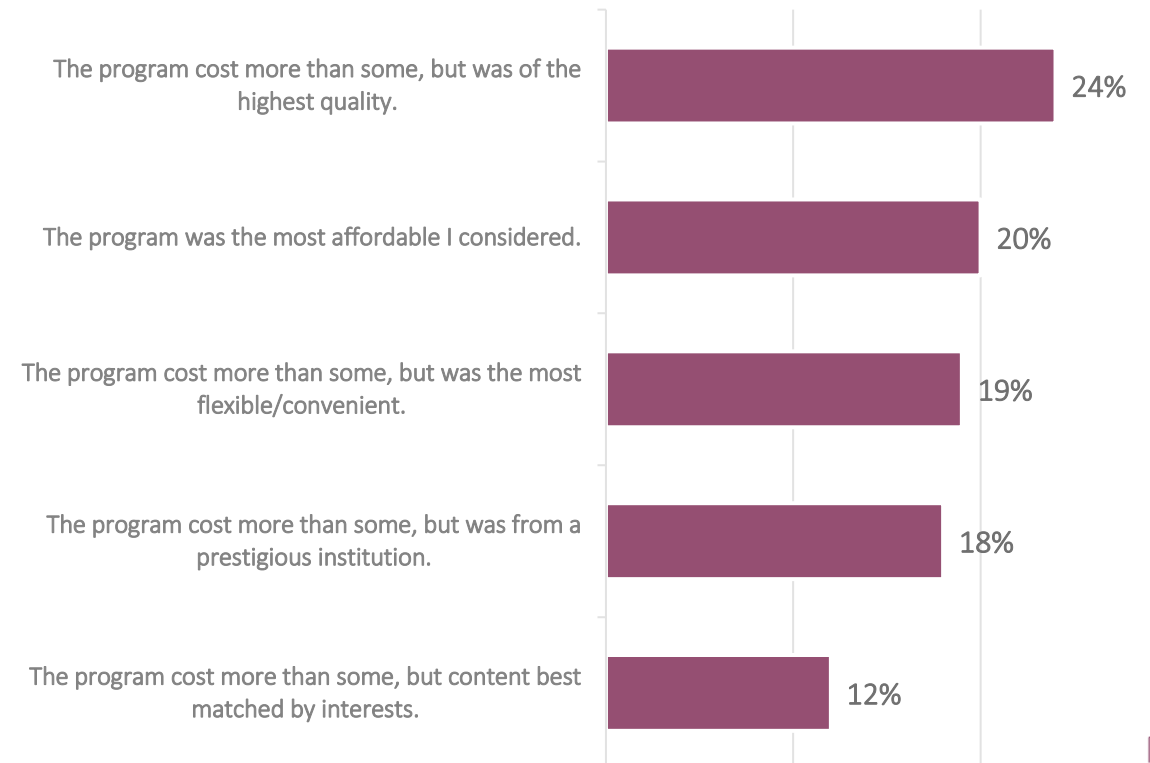
Action

Institutional strategy associated with addressing the cost of study focused on domestic doctoral students should not only prominently position ways to defray costs but also discuss the “trade-offs” to cost, such as quality, flexibility, and match to interests.

Likelihood of Removing Program from Consideration



Cost in Enrollment Decision

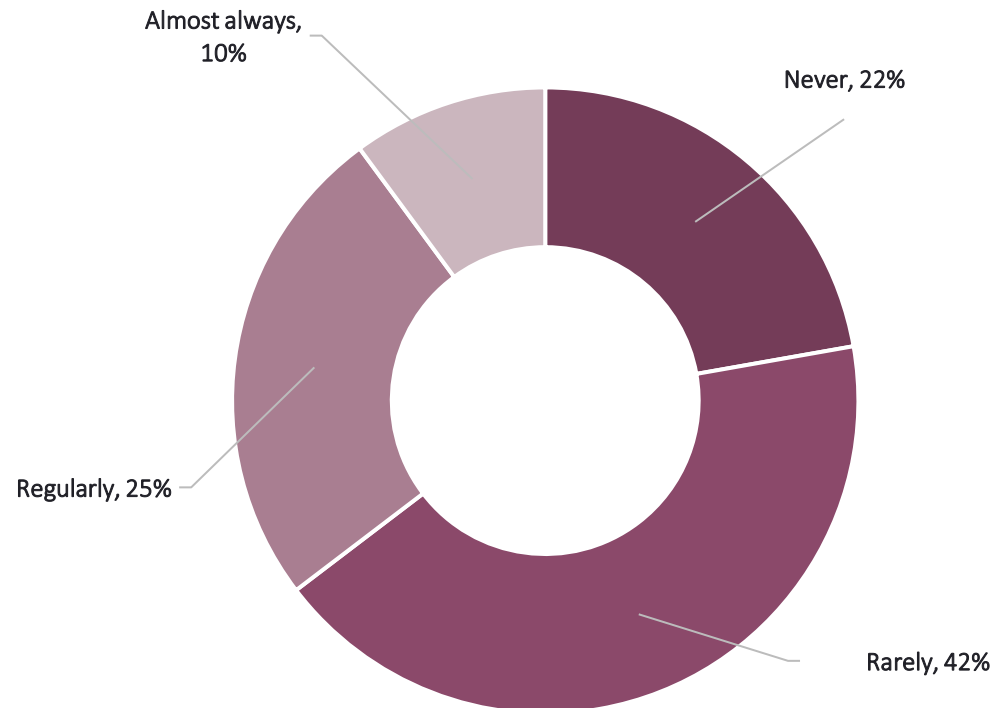


They do not limit credits to manage expenses.

Finding

Domestic doctoral students are less likely to limit the number of credits in which they enroll to manage out-of-pocket expenses than master's students are, and they are less likely to use their own funds to pay tuition.

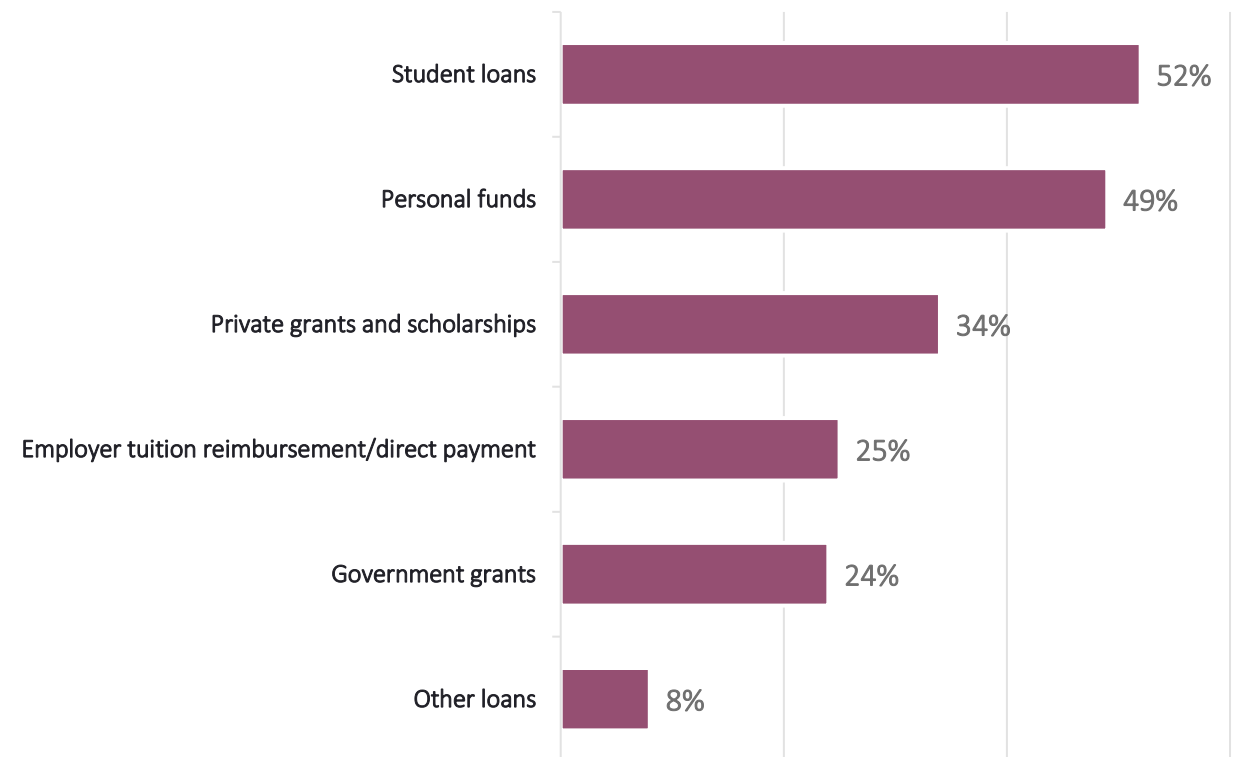
Frequency of Limiting Credits to Manage Expenses



Action

Doctoral programs seeking to expand domestic enrollment must be sure that finding information about the ways to pay for the program are easy to find and clear to understand. Half expect to pay at least part of their tuition bill themselves.

Tuition Payment Sources



Sources

The primary source of the data included in this report is derived from a survey RNL conducted among more than 1,500 prospective and enrolled graduate students in March 2023. Among that sample, 9 percent of respondents indicated that they were either currently enrolled in, or planning to enroll in a doctoral level program within the next 12 months. This resulted in 154 complete and useable responses that form the basis for this report. The full findings of this study were published in May 2023 in RNL's [2023 Graduate Student Recruitment Report](#).

Additional Sources:

Additional data describing the graduate education market as we approach the end of 2024 are derived from the following sources:

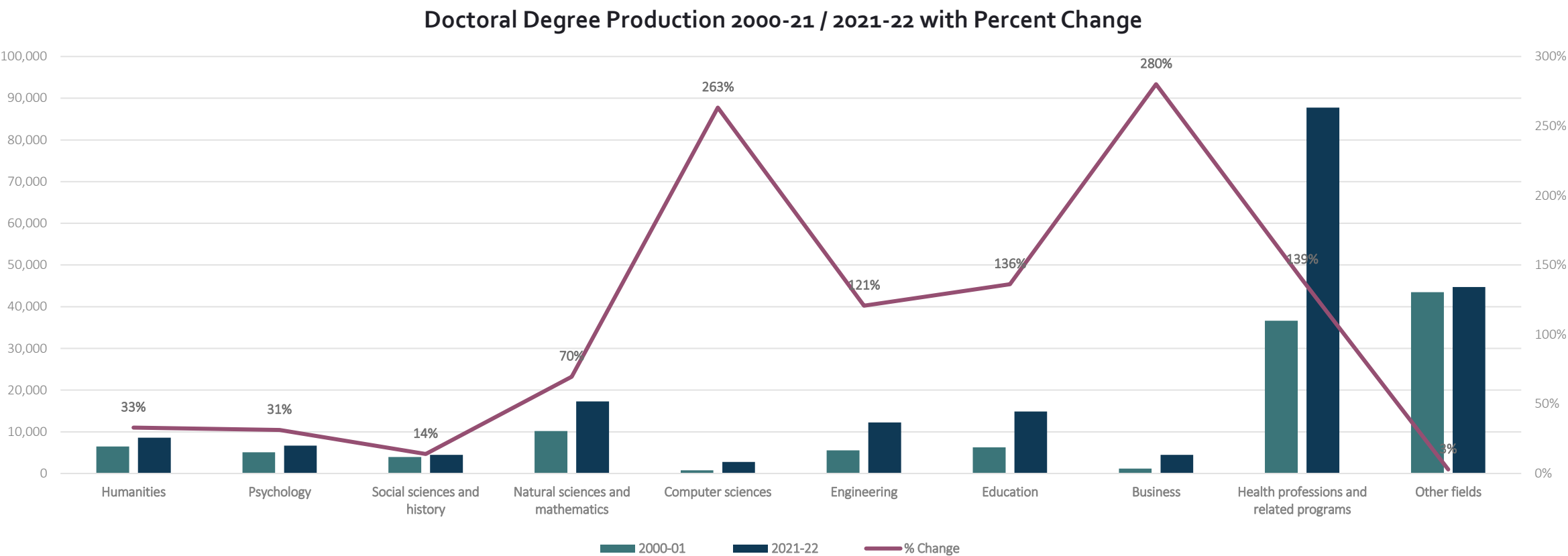
[Open Doors 2024 Report](#). Institute for International Education. November 18, 2024.

Digest of Education Statistics 2023 (Online Tables). [Table 318.10](#). 2024.

[Stay Informed: First Look at Fall 2024 Highlights](#). National Student Clearinghouse. October 23, 2024.

Appendix: Doctoral Degree Production by Discipline

Note: These data do NOT reflect domestic-only degree production, but rather all degree production.



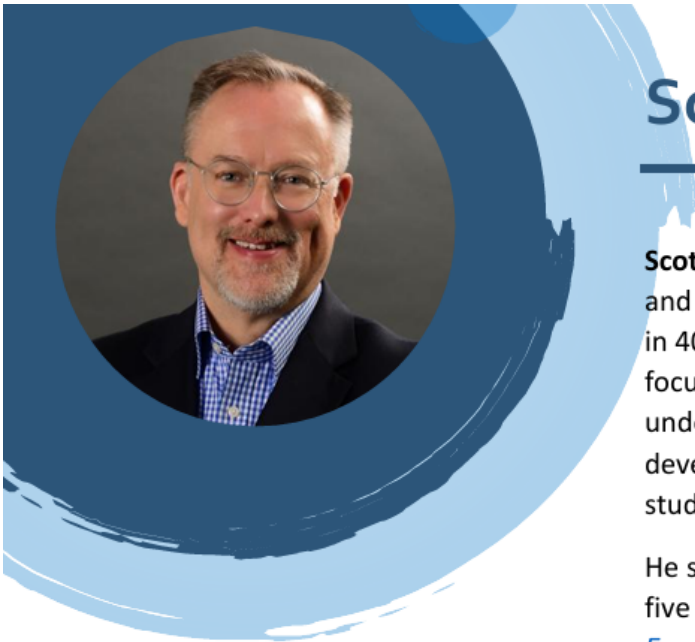
Humanities includes degrees in Area, ethnic, cultural, gender, and group studies; English language and literature/letters; Foreign languages, literatures, and linguistics; Liberal arts and sciences, general studies, and humanities; Multi/interdisciplinary studies; Philosophy and religious studies; Theology and religious vocations; and Visual and performing arts.

Social Sciences and History includes Biological and biomedical sciences; Mathematics and statistics; and Physical sciences and science technologies.

Engineering includes Engineering; Engineering technologies and engineering-related fields; Construction trades; and Mechanic and repair technologies/technicians.

Business includes Business, management, marketing, and related support services; and Personal and culinary services.

Other Fields includes Agriculture, agriculture operations, and related sciences; Architecture and related services; Communication, journalism, and related programs; Communications technologies; Family and consumer sciences/human sciences; Homeland security, law enforcement, and firefighting; Legal professions and studies; Library science; Military technologies and applied sciences; Natural resources and conservation; Parks, recreation, leisure, and fitness studies; Precision production; Public administration and social services; Transportation and materials moving; and Not classified by field of study.



Scott Jeffe

Scott Jeffe is a national expert and thought leader in the graduate, online, and adult education space. Scott has worked with nearly 400 institutions in 40+ states to apply market data to strategic decision making. With a focus on profiling the demands and preferences of graduate students, undergraduate adult degree completers, and online students, Scott has developed a unique sensitivity to ensuring that programs align with student demand while upholding institutional mission and values.

He served as Vice President for Graduate and Online Research at RNL for five years, and in that capacity he was a co-author of RNL's [*Strategic Enrollment Planning: A Dynamic Collaboration*](#) (3rd Edition), as well as the principal researcher for 15 national reports including RNL's [2024 Online Student Recruitment Report](#), [2023 Graduate Marketing and Recruitment Practices Report](#), the [2023 Graduate Student Recruitment Report](#), the [2022 Online Student Recruitment Report](#), the [2022 Online Program Marketing and Recruitment Practices Report](#), the [2021 Graduate Marketing and Recruitment Practices Report](#), the [2021 Graduate Student Recruitment Report](#), and dozens of [blogs and articles](#).

While at RNL, he also created program prioritization and positioning study that he conducted for more than 40 institutions. This process first helped institution determine the relative market strength of new programs and/or the likelihood of growth among existing programs and then helped them develop a roadmap to meaningful differentiation in a crowded higher education space.

About the Author

Visit www.scottjeffe.com for more information about Scott's research and consulting services.