

State of the State

The Future of Search

A Kanahoma Presentation



Agenda

- Setting the Stage
- Where We've Been
- Where We Are
- Where We're Going: Near-Term
- Where We're Going: Long-Term
- What We Should Do About It
- Final Thoughts

What This Is vs. What This Isn't

Setting the Stage

State of the State: The Future of Search

Search is a Cornerstone of College Selection

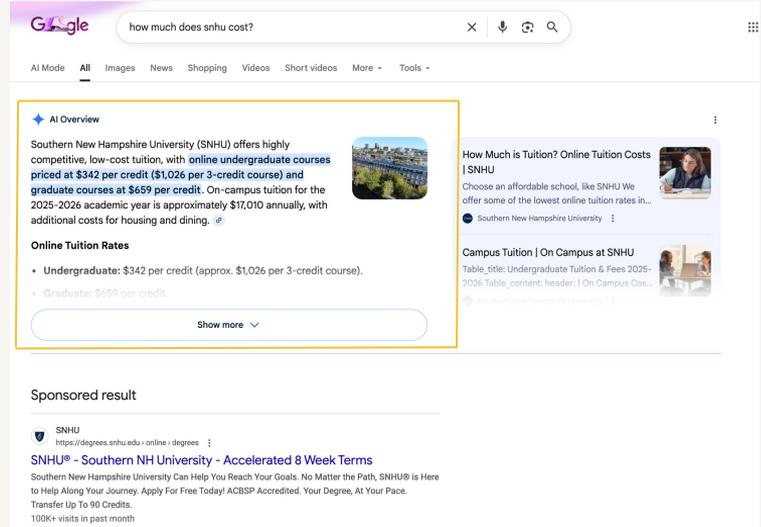
- Search engines are the *default starting point* for the vast majority of prospective students
- Over 80% *of all* online experiences start with a search engine
- Colleges and universities are spending more *than ever* on Google
- University websites remain the *most trusted* information source during search

**Search isn't just one channel among many -
it's where students *start, compare, and validate* their college choice**

Search as we know it is changing

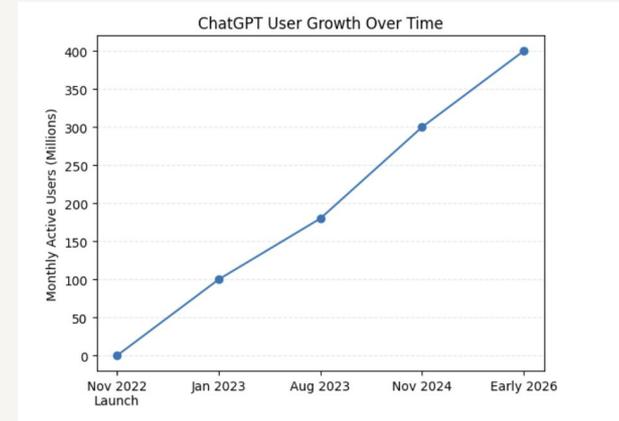
The Rise of Zero Click

- 60% of Google searches now end *without* a click
- SERP features such as featured snippets, knowledge panels, People Also Ask, and AI summaries are driving behavior by delivering information instantly
- Fewer clicks means reduced organic traffic *and* paid ads often getting pushed down the page



The Rapid Adoption of LLMs

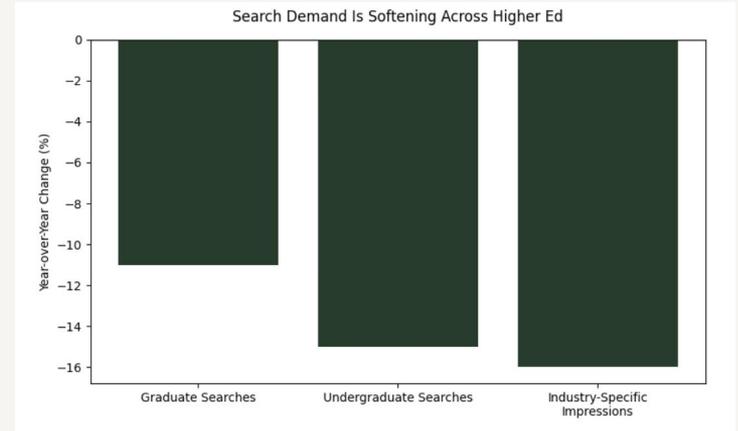
- Large language models - like ChatGPT - now have over 800 million weekly active users
- 52% of US adults report using LLM-powered AI tools like ChatGPT, Gemini, Claude, or Copilot
- 15% - 20% of users now *begin* searches with an AI platform



Search Itself is Softening

Google Fall 2025 Analysis

- -11% YoY decline in Grad User Searches
- -15% YoY decline in Undergrad User Searches
- -16% YoY decline in industry-specific impressions



Higher Ed is More Reliant on Search Than Ever

- Organic search is the anchor that keeps the ship afloat
- Paid search is a primary acquisition channel for nearly every institution
- We're understandably over-reliant on lower-funnel, directly attributable activity

So What Should Marketers Do?

Where We've Been

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Higher Ed *Wasn't* Built on Search

Higher Ed was Built on a Surplus of Demand

For decades, demand exceeded supply – discovery and acquisition were secondary concerns

- **Public institutions** were designed to serve local demand with limited competition
- **Private institutions** differentiated regionally on reputation and mission
- **Distance ed** (and eventually online) emerged to serve an unmet market need

If You Built it, They *Did* Come

Acquisition Marketing was Introduced out of Necessity

- Demand softened as demographics, competition, and delivery models changed
- At the same time, institutional appetite for growth only increased
- Institutions needed predictable ways to generate inquiries and applications
- Acquisition channels emerged to supplement - not replace - organic demand
 - Traditional edu embraced list/name buying
 - Non-traditional edu embraced affiliate/PPL

For the Majority of our History,
Search *has not* been Higher Ed's
Primary Acquisition Channel

Today's Higher Ed *is* Built on Search
(and Discovery*)

Tangent Alert

Search vs. "Discovery"

Today's Higher Ed *is* Built on Search (and Discovery)

- **Traditional Undergraduate Recruitment**
 - List buying is still a primary investment for many institutions
 - But list buying is declining (at best) or dying (at worst)
 - Search and discovery is increasingly influenced by third-party marketplaces

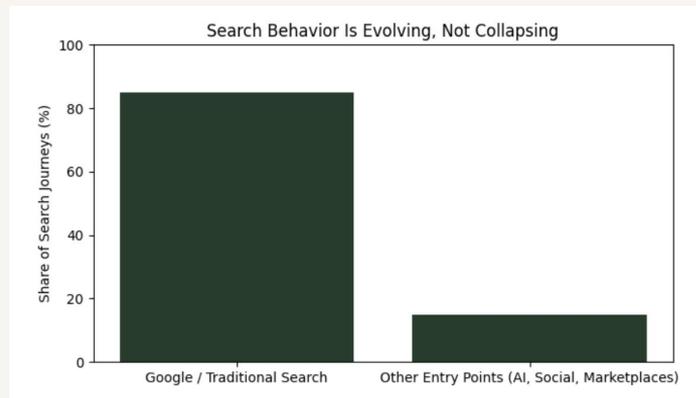
- **Non-Traditional Marketing *is* Paid Search (+ Paid Social)**
 - Largest investment for *most* institutions
 - Increasingly inefficient as competition outpaces demand

Where We Are

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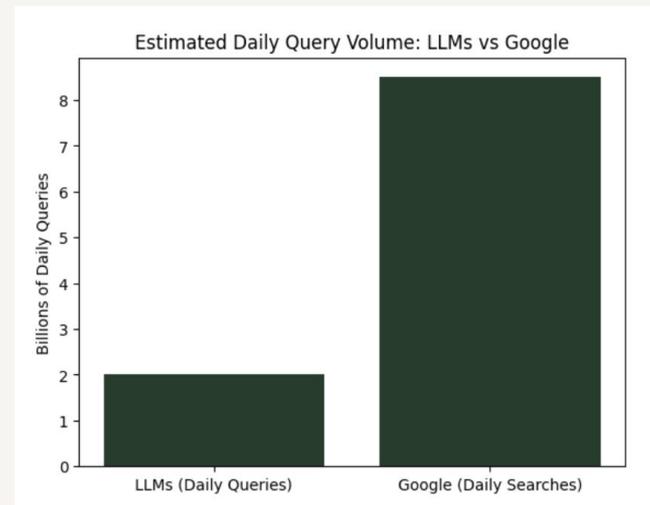
The Platform *isn't* on Fire, But *It Is* Melting

- Change is happening *slower* than headlines suggest
 - 85% of journeys still start with Google
 - AI utilization is often additive, not substitutive
- **The playbook of the past *still* drives revenue today**
- But structural shifts are real and trends are clear



The Reality of our Present State

- Paid search is increasingly inefficient
 - Especially non-branded, program-specific
- Organic traffic (for many) is declining as SERPs compress and SEO remains underinvested
- Most institutional websites *still* struggle to convert attention into action



How *We've* Marketed in the Past *Won't* Work in the Future

But *it does* Still Work Today...

Intentionality > Urgency

The Smart Questions Being Asked

- *How will changes in search impact paid performance and efficiency over time?*
- *What role should organic, SEO, and overall visibility play moving forward?*
- *How do we influence zero-click experiences and LLM-driven discovery?*
- *How will attribution, measurement, and decision-making need to evolve?*
- *How should our media mix, budgets, and teams change as search fragments?*

Where We're Going

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Near-Term vs. Long-Term

Where We're Going: Near-Term

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#1 Our Primary Channels will Remain Under Pressure

- **Paid search** will continue to get more expensive and less efficient
 - Competition will outpace demand across most core program categories
 - Platform changes will push paid results further down the page
- **Paid social** has (largely) matured
 - Platforms with strong ad ecosystems (e.g., Facebook, Instagram) *aren't* growing
 - Secondary (e.g., TikTok) and emerging (e.g., WhatNot) platforms *don't* have strong ad tech
- **Name buying** will continue to decline

You shouldn't plan for improved performance *unless* you have a plan to achieve it

#2 SEO is Much More Complex *and* Important

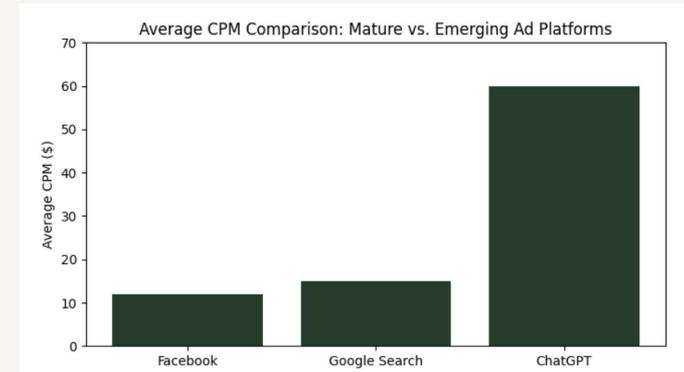
- Search engine optimization now spans
 - **Traditional Search**
Optimizing your website and content to rank in organic search results and drive traffic from Google and other traditional search engines.
 - **Answer Engines (AEO)**
Structuring content so search engines and answer boxes can surface clear, authoritative answers directly within search results – often without a click.
 - **Generative Engines (GEO)**
Creating and distributing authoritative content that large language models reference, summarize, and cite when generating responses to user questions.



Underinvestment in SEO is becoming a structural disadvantage

#3 New Ad Units *Will* Come – and *Will* Underproduce

- **Traditional platforms** (e.g., Google) are introducing new AI-enhanced search experiences
 - Including placements near AI Overview panels and rich answer surfaces
 - To date, these ad units underperform traditional SERP ads
- **Emerging platforms** (e.g., ChatGPT) are integrating ads across their products as well
 - \$200k minimum spend
 - \$60 est. CPM



High-End CPM Estimates

#4 Our Website Matters Now More Than Ever

- Traffic may decline, but intent and quality will rise
- Fewer visitors means less margin for friction or confusion
- Conversion rate optimization is now a primary growth lever

Key CRO Opportunities

- Site speed and performance
- Content structure and hierarchy
- UX/UI and clarity of pathways
- Program Discovery
- Reduced click path to action
- CTA placement
- Thumb-optimization
- Thank You page experience

#5 The Answer is 1,000 Solutions, Not One

While leadership will seek a silver bullet, the reality is success will come from:

- **Better** Programs
- **Better** Positioning
- **Better** Creative
- **Better** Media Buying
- **Better** Web Experience (Conversion)
- **Better** Nurture (Yield)

#6 Third-Party Validation and the Return of PR

- **Authority is now a primary driver of discovery**
 - Algorithms increasingly reward credibility, not just relevance
- **Authority does not live only on owned channels**
 - It is shaped across social media, traditional media, marketplaces, and message boards
 - Influence comes from experts, practitioners, and peer validation
- **PR is no longer synonymous with media relations**
 - Modern PR includes thought leadership, expert participation, and narrative control
- **Misinformation is real - and silence creates risk**
 - Institutions that do not actively shape the conversation leave room for others to do it for them

#7 We Need to Rethink our Campaign Strategies

- **Non-branded, program-specific paid search** is the tip of the spear for inefficiency
- **Budgets dedicated by programs** limit scale
- **Budget strategy** is now a primary performance level
- The strongest performers are **consolidating budget** and understand that **smarter budgeting beats smarter tactics**

Brand	\$
Degree-Level	\$\$
Area of Study	\$\$\$
Program-Specific	\$\$\$\$

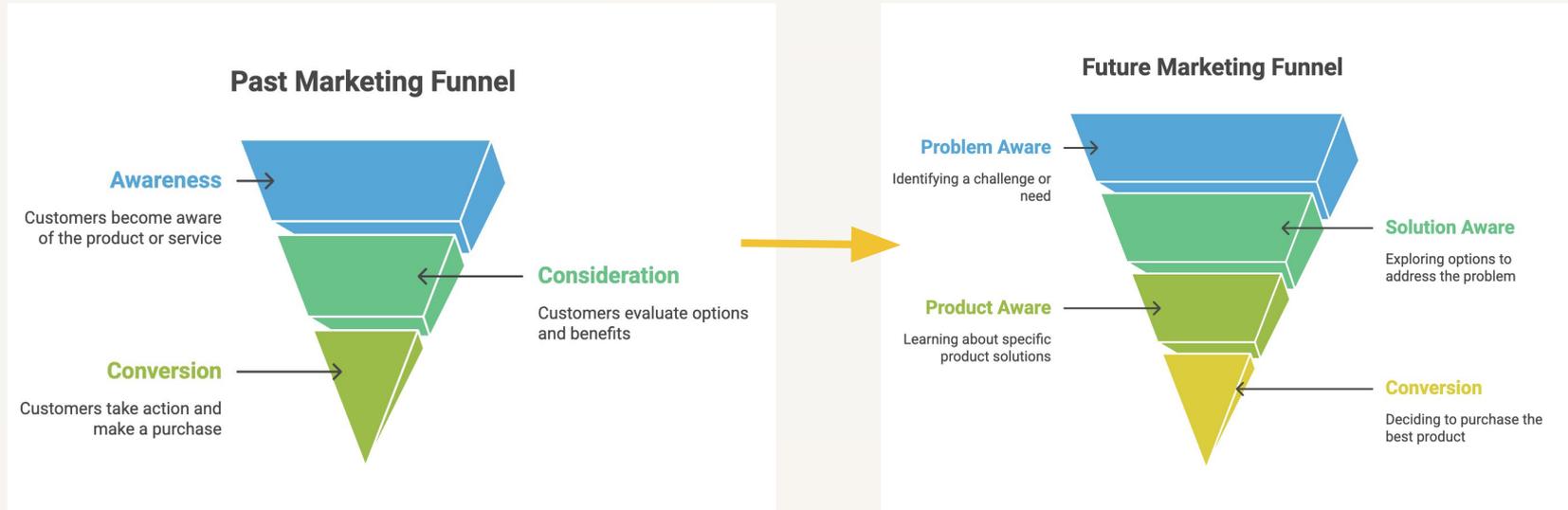
#8 Understand Attribution Will Only Get Harder

- **Engagement is increasingly multi-channel** and non-linear
 - Prospects move fluidly across search, social, AI tools, content, and peer validation
- At the same time, **visibility is declining** as tracking becomes more constrained
 - Privacy regulation, platform restrictions, and walled gardens reduce channel-level clarity
- **First-party data** has never been more important
- **Alignment matters** more than precision
 - Institutions must agree on how success is measured, even when measurement is imperfect
- This challenge compounds as **SEO investment increases**
 - Long-cycle, non-click-based influence will outpace traditional attribution frameworks

#9 AI is Augmenting the Admission Experience

- High-intent prospects are **increasingly engaging with technology**, before your team
 - AI site search, chatbots, and self-service AI Admissions tools are often the first “conversation”
- **AI is becoming the front door** to admissions
- These tools **reduce friction and increase responsiveness** but are all chapters in the “new playbook”
 - Introducing uncertainty as it relates to historical yield and melt rates

#10 We Need to Rethink the Marketing Funnel Itself



Where We're Going: Long-Term

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Where We're Going: Long-Term

1. The RFI will Die
2. Paid & SEO will Come Together
3. Our Teams will Consolidate and Require Clarity
4. The Rise of Reputation and Referral
5. This *Won't* be the Biggest Disruption

What We Should Do About It

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What We Should Do About It

1. Spend *More* on Google, *Not* Less
2. Spend *More* in Marketing (In General)
3. Spend (at least) 5% - 10% on SEO (Trad + AEO + GEO)
4. Everything Starts with Understanding Current State Visibility
5. Embrace the Idea of R&D in Marketing



What We Should Do About It (Cont'd)

6. Don't Run Ads on ChatGPT (yet...)
7. Be a Fast Follower
8. Focus on the Fundamentals
9. Revisit Budget Strategy
10. Build Your Brand

Additional Considerations

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Additional Considerations

- *Don't* bet against Google & Meta (at least not yet...)
- Recognize *we are* in an AI bubble
- Remember that culture is more critical than technology

Final Thoughts

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This *is still* a Winnable Game



Thank You

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