



The 2019 State of Higher Ed Marketing

Contents

- 05 Marketing's Role in Higher Ed Leadership
- 13 Budget & Resources
- 19 Marketing Department
- 25 Metrics, Objectives, Priorities
& Effectiveness
- 32 Digital & Traditional Advertising
- 39 Keeping Up With Digital Trends
- 45 The Questions We're Asking



The Study's Purpose

- Gather data on the state of marketing in higher ed
- Establish industry benchmarks
- Evaluate the pace of growth of our industry
- Identify trends and hot topics
- Understand goals, responsibilities, and measurement techniques
- Track our industry as it matures

Report Legend



Doctoral-Granting University



Master's College or University



Baccalaureate College



Key Insight



Student

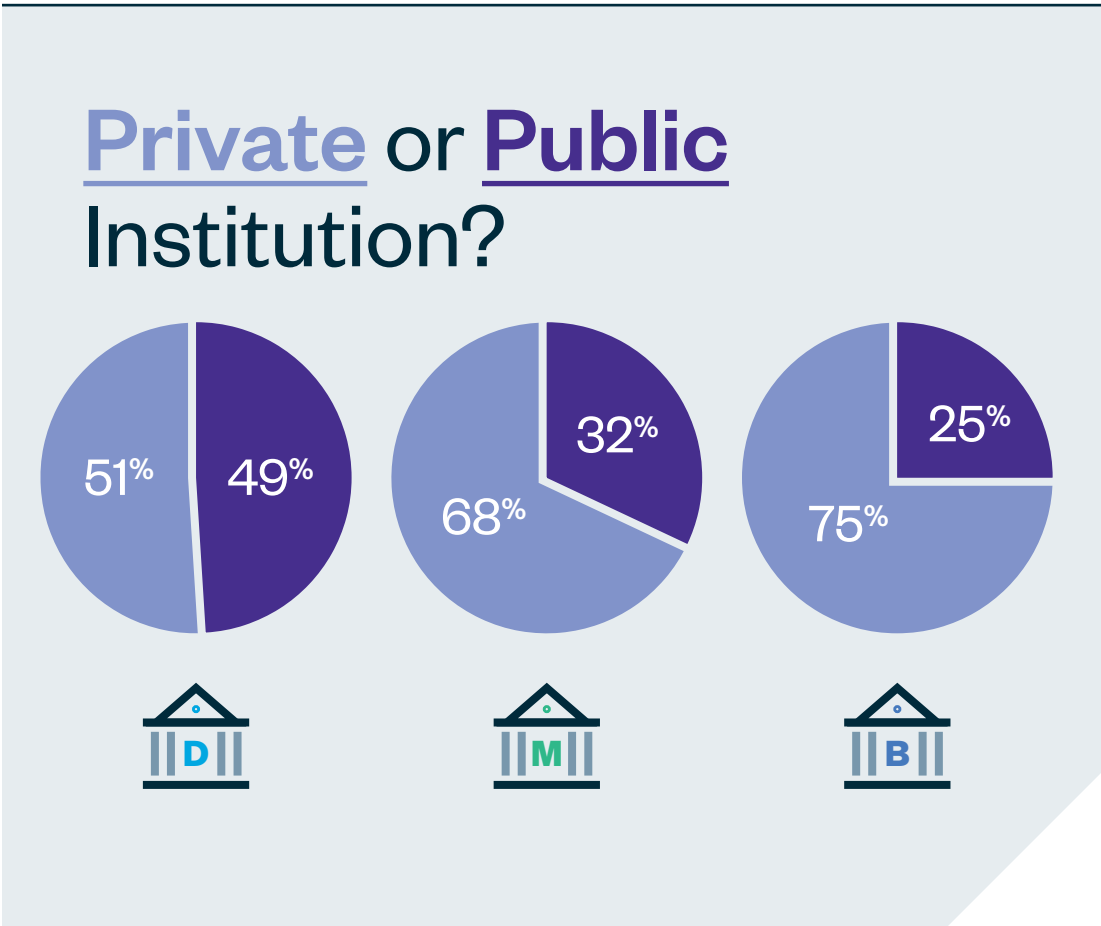
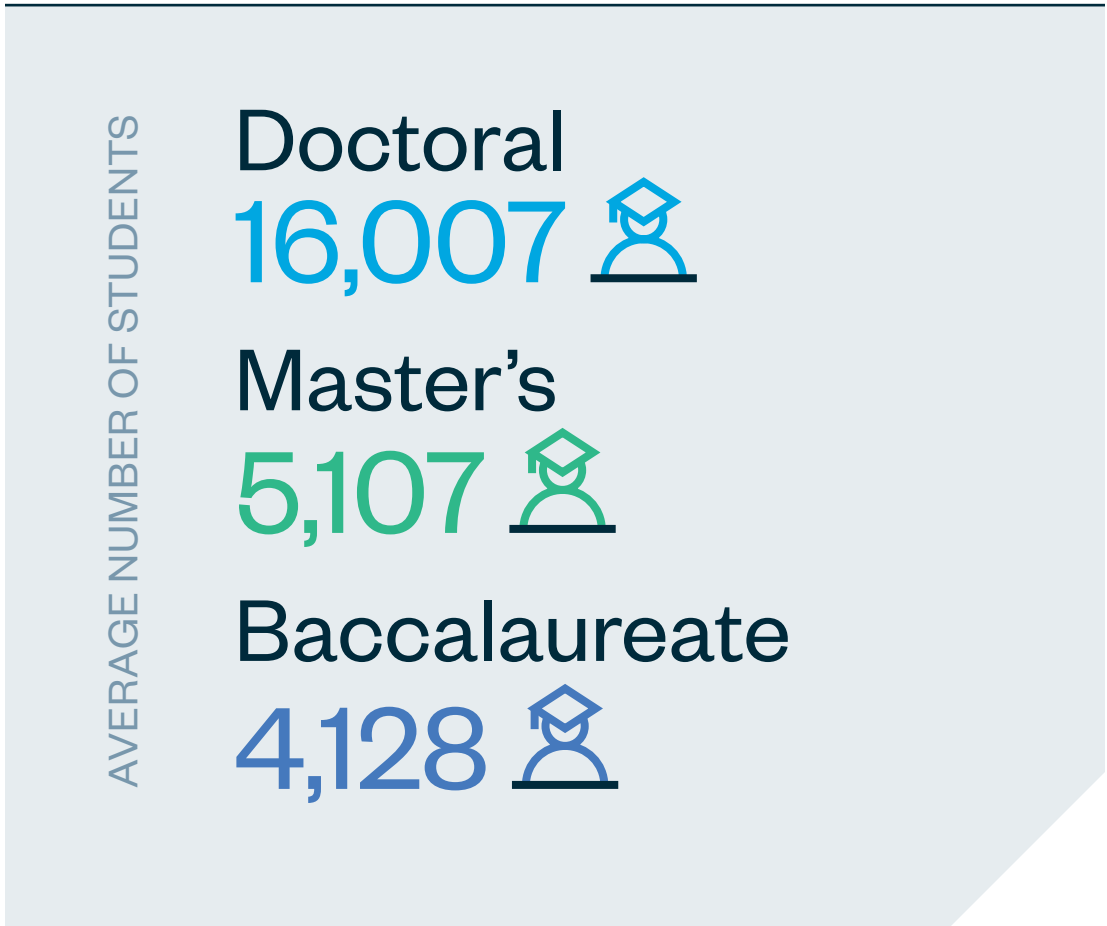
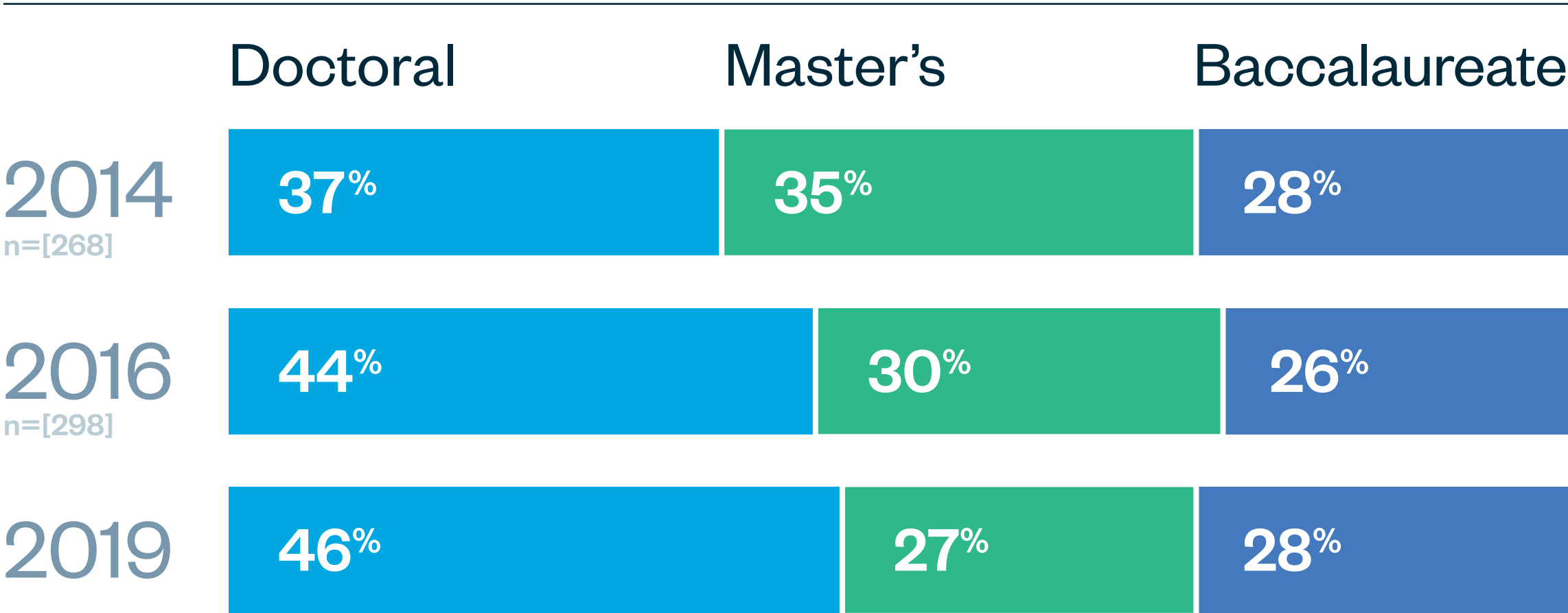


FTE Staff



Methodology

- Results obtained by input from 270 respondents.
- All respondents work for a 4-year, nonprofit institution in the United States.
- All respondents are senior officers who oversee marketing and communications and work within a central marketing/communications office.
- Only one respondent per institution was used in our survey. In instances where multiple officials responded from the same institution, we used only the most senior official.



Section 2 /

Marketing's Role in Higher Ed Leadership

Not all lead marketers are part of institutional leadership.

- Doctoral and Master's institutions are more likely to have lead marketer in a VP role, while Baccalaureate institutions are more likely to have them in a director role.
- Lead marketer salaries vary by title more so than by institution type, with VPs compensated at a higher rate than their counterparts in the director role.
- Large majority of lead marketers are involved in discussions around promotion and recruitment, but fewer are involved in other discussions that significantly impact enrollment goals like program development and pricing.



48%

of respondents report directly to the president/chancellor

56%

of respondents are members of cabinet/executive leadership team



43%

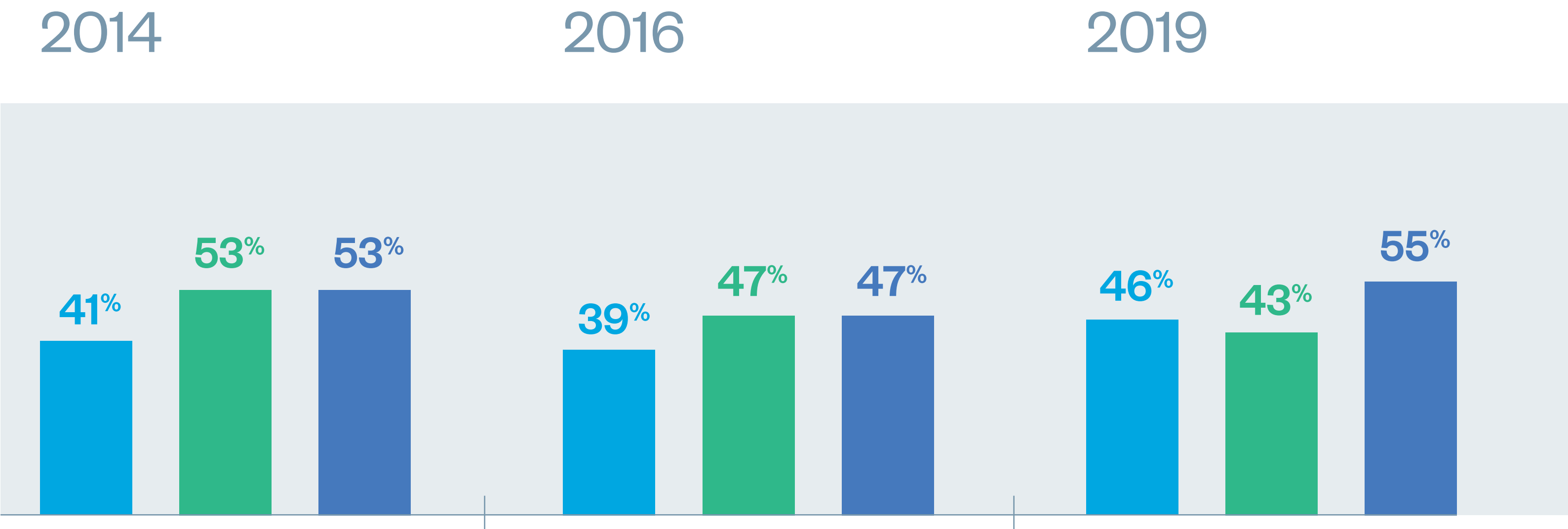
of respondents report directly to the president/chancellor and are members of cabinet/executive leadership team



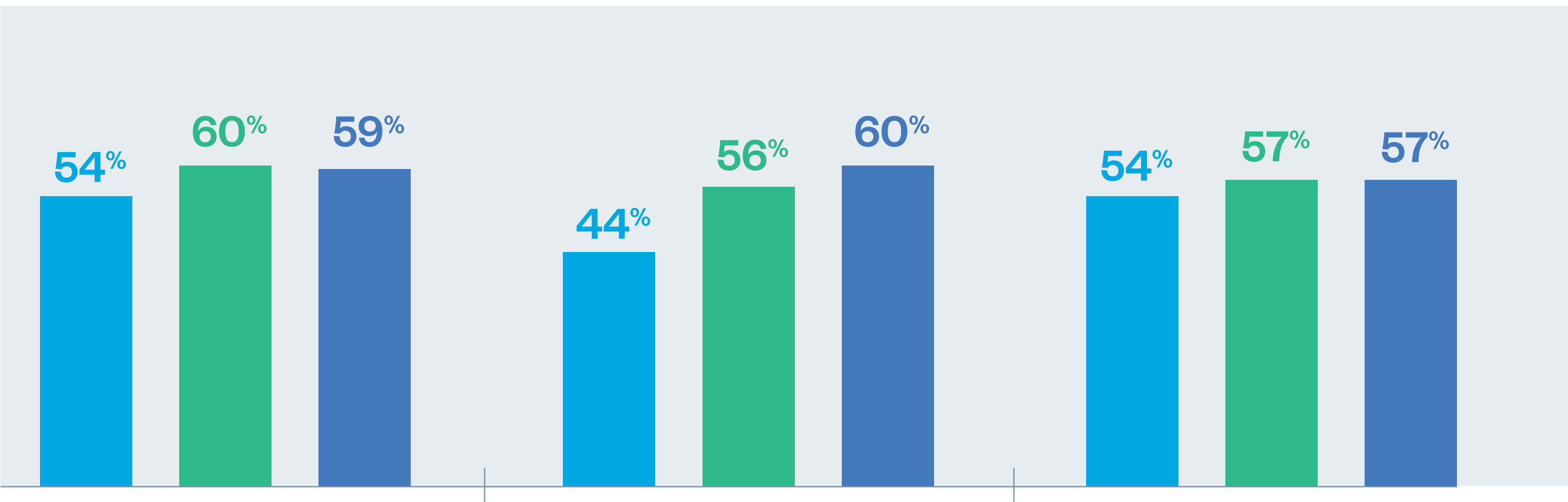
Marketing's Role / Institutional Leadership



“ Do you report directly to the president/chancellor of your institution?
% Yes



“ Are you a member of the president’s cabinet/ executive leadership team (or equivalent)?
% Yes



Marketing's Role / Salary

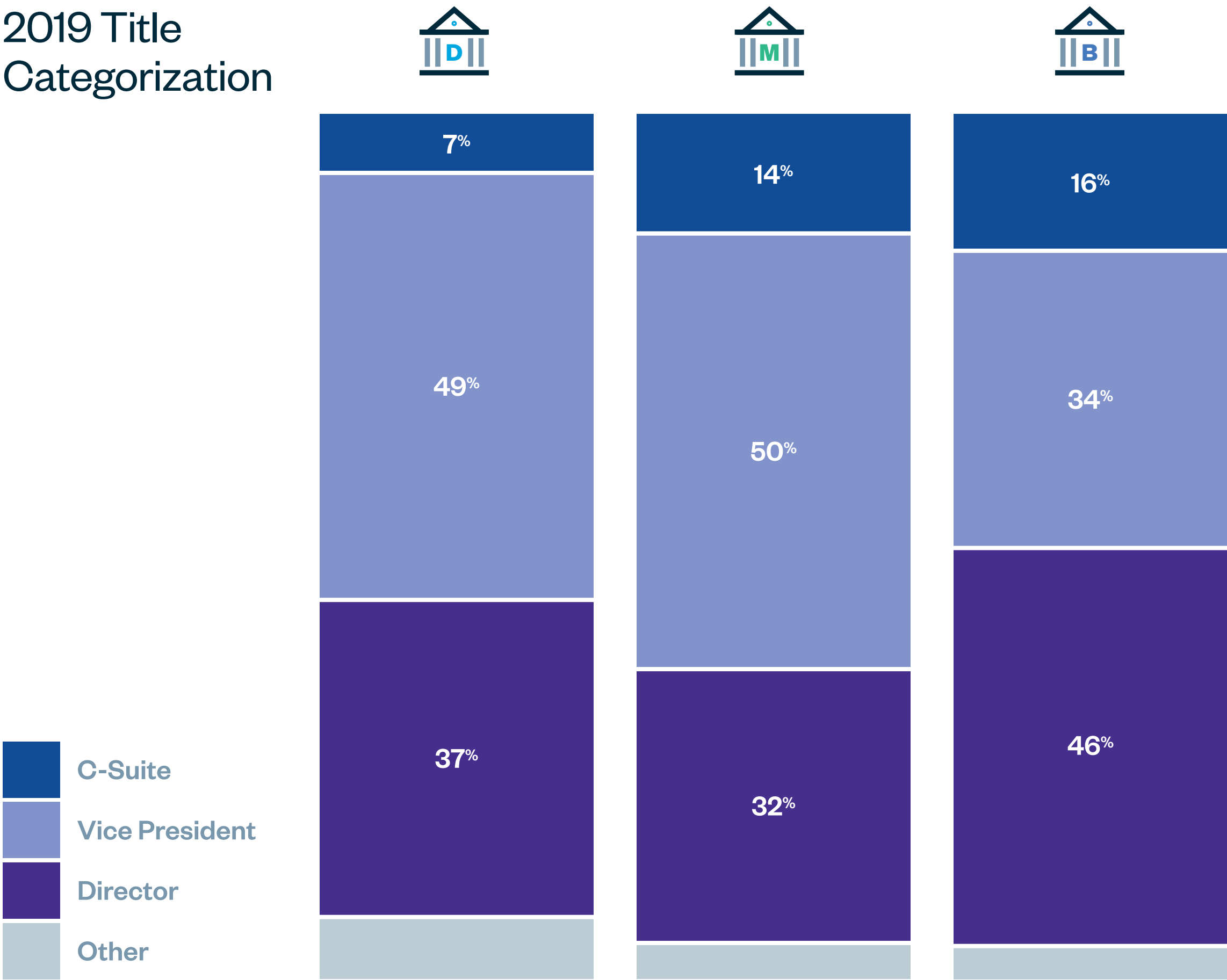
Lead Marketer Salary

 Doctoral	 Master's	 Baccalaureate
Mean \$175,148	Mean \$170,286	Mean \$156,636
Max \$365,000	Max \$340,000	Max \$375,000
Median \$130,000	Median \$123,000	Median \$100,000
Min \$70,000	Min \$97,000	Min \$80,000



Marketing’s Role / Title & Salaries

2019 Title
Categorization



Salary Ranges
by Title

Vice President Mean

\$175,148

Min

\$70,000

Max

\$365,000

C-Suite Mean

\$156,636

Min

\$80,000

Max

\$375,000

Director Mean

\$87,656

Min

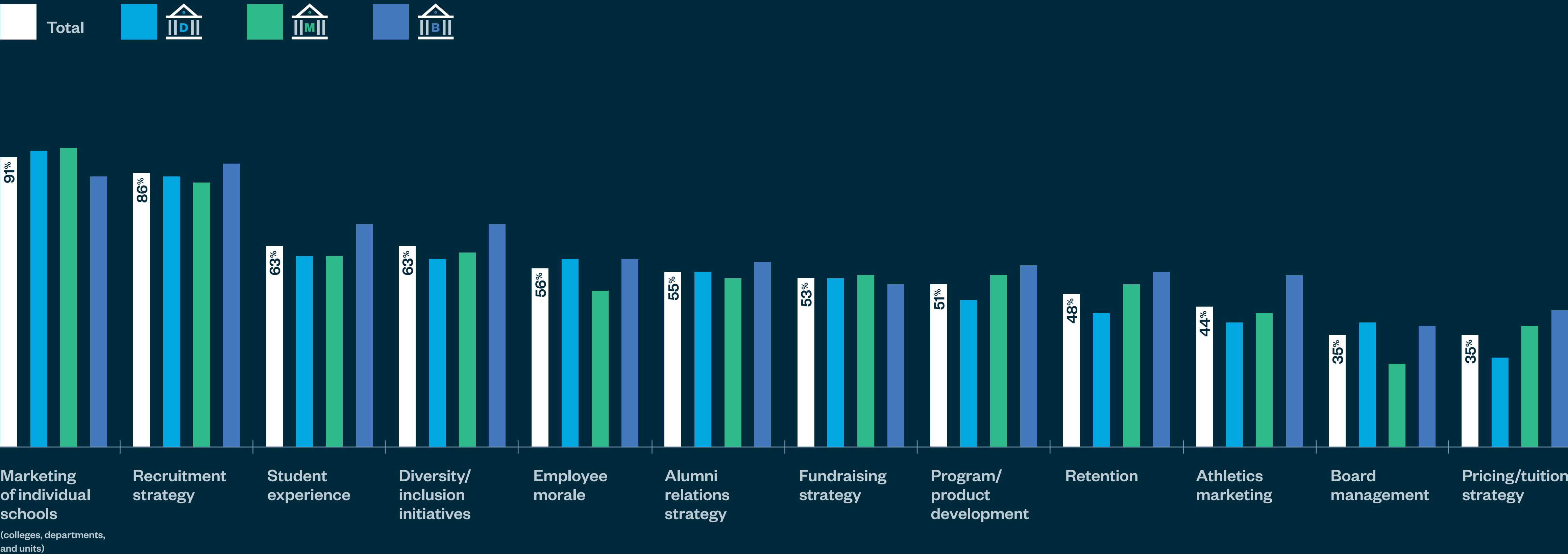
\$50,000

Max

\$165,000

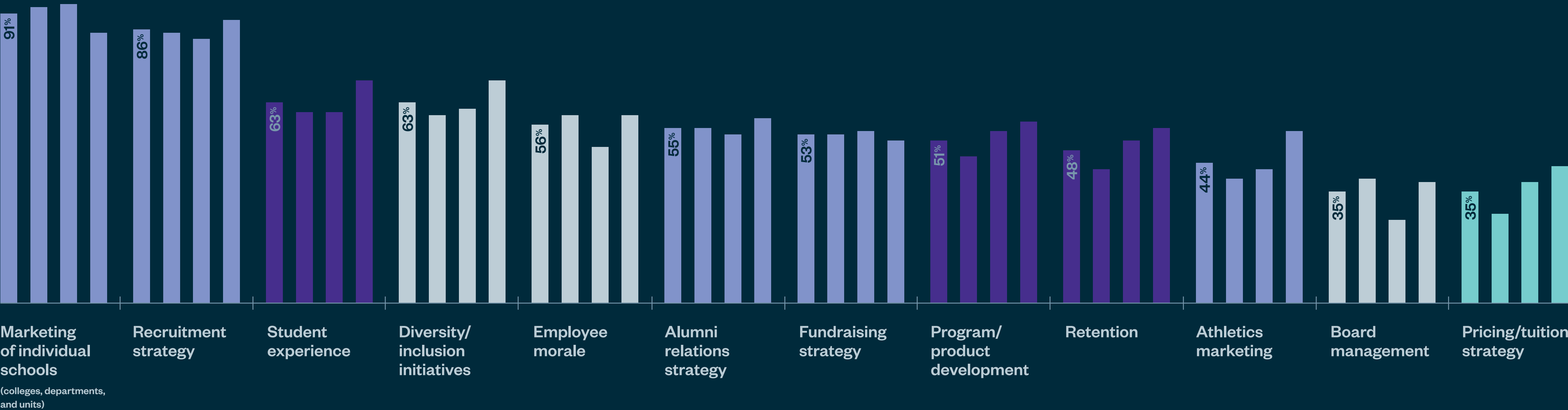
Marketing's Role

As the lead marketer at my institution, I am involved in discussions regarding:



Marketing's Role / Leadership and the 4Ps of Marketing

As the lead marketer at my institution, I am involved in discussions regarding:



Section 3 /

Budget & Resources

Know your budget & manage your expectations.

- Marketing department budgets vary significantly both within and across institution types.
- More than 3 in 4 lead marketers say their department does not have the budget needed to meet expectations of leadership.
- More than 1 in 4 say their department's budget has increased, but almost as many say it has decreased. Half of respondents say their budgets haven't changed.
- Twenty percent of lead marketers don't know or aren't able to estimate their own department's budget.



Budget & Resources / Overall Budget

2019 Overall Department Budget

 Doctoral

Mean
\$3,430,156

Median
\$2.5M

Max
\$12,000,000

Min
\$455,800

Don't Know
or Can't Estimate

15%

 Master's

Mean
\$1,730,611

Median
\$1.6M

Max
\$4,200,000

Min
\$300,000

Don't Know
or Can't Estimate

21%

 Baccalaureate

Mean
\$1,139,868

Median
\$1.0M

Max
\$3,700,000

Min
\$150,000

Don't Know
or Can't Estimate

20%



Marketing Budget as a Percentage of Institutional Budget

 Doctoral

Mean
1.39%

Median
0.85%

Max
11.67%

Min
0.05%

 Master's

Mean
2.00%

Median
1.63%

Max
9.06%

Min
0.48%

 Baccalaureate

Mean
2.39%

Median
1.67%

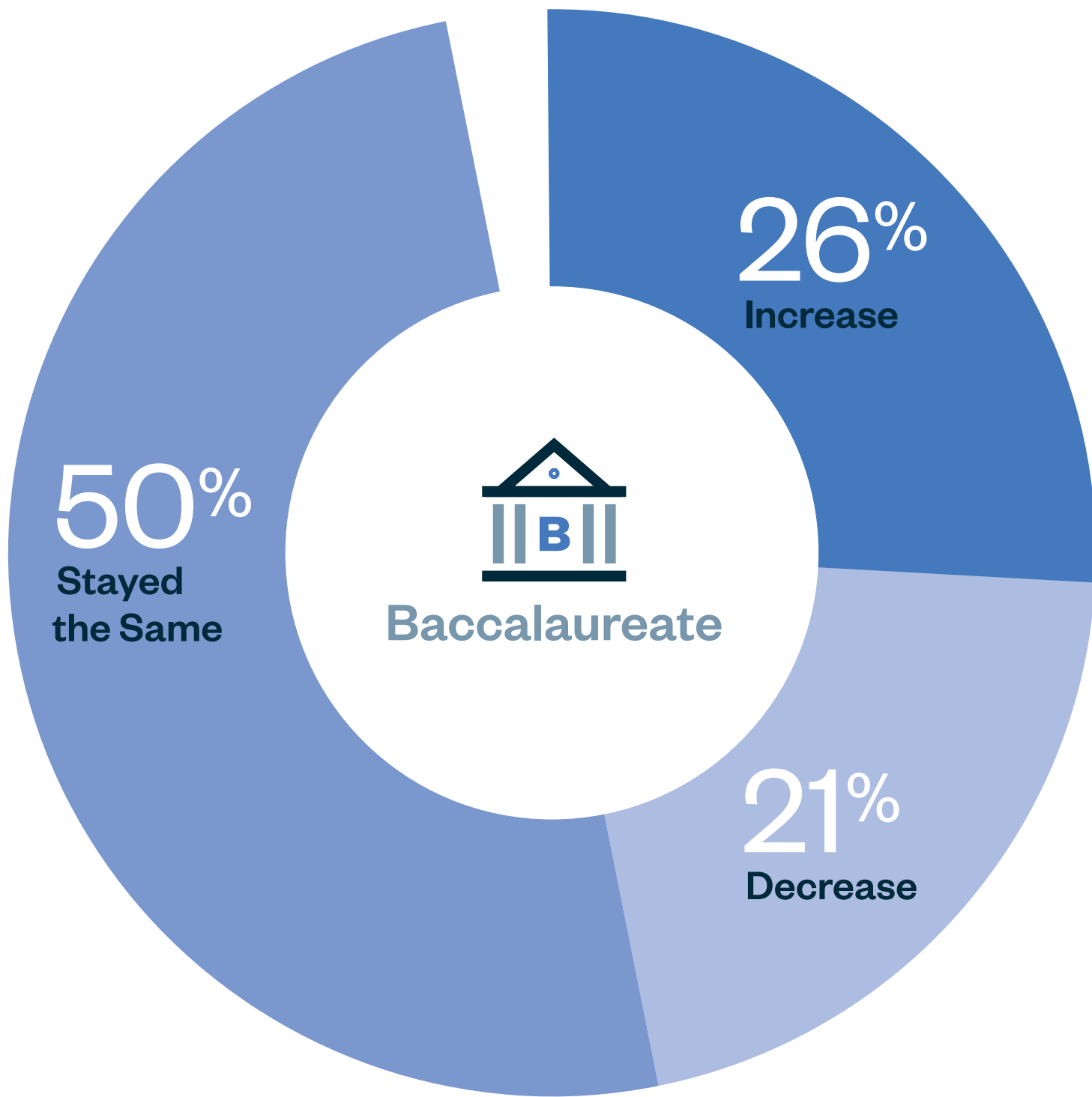
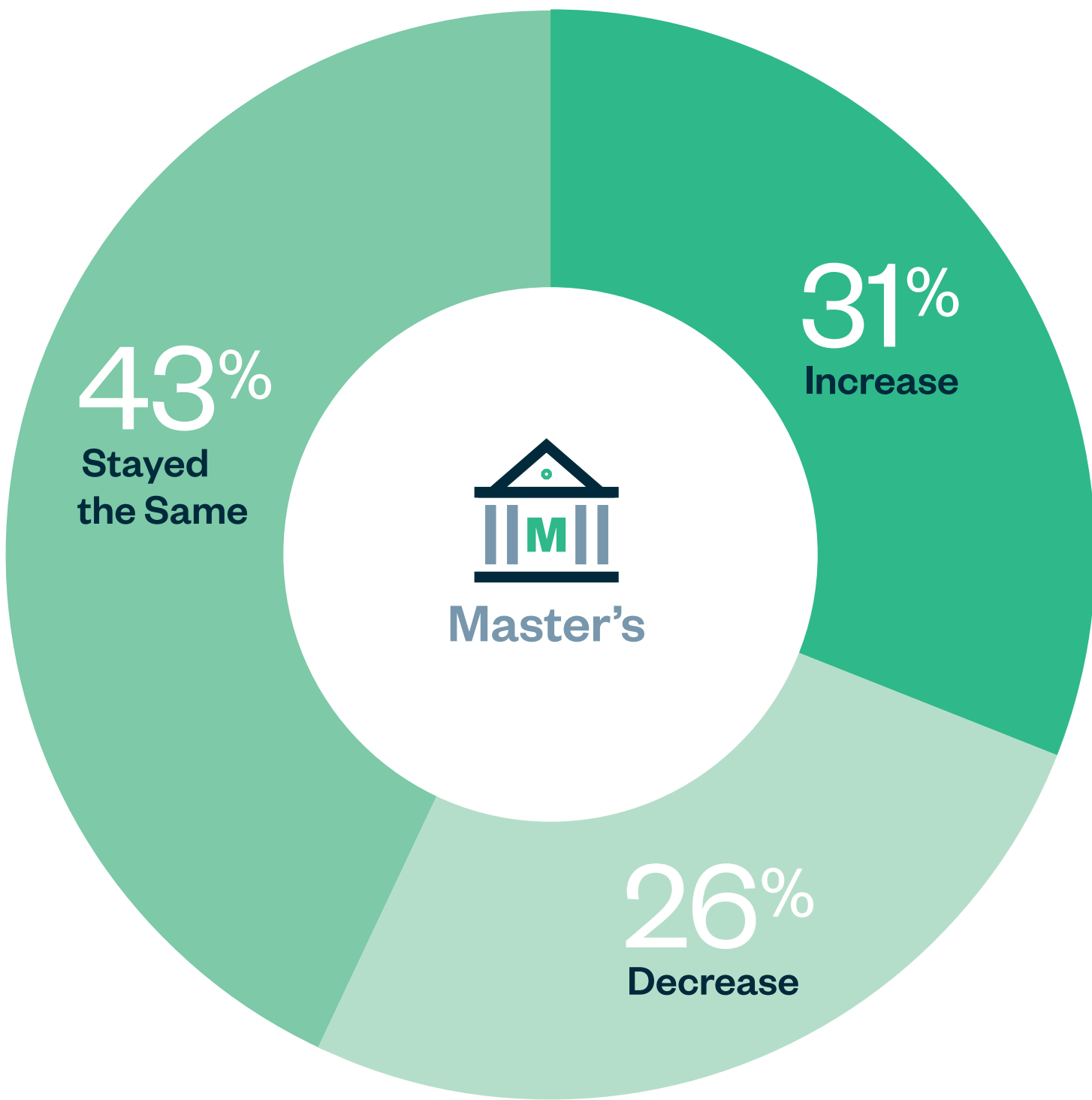
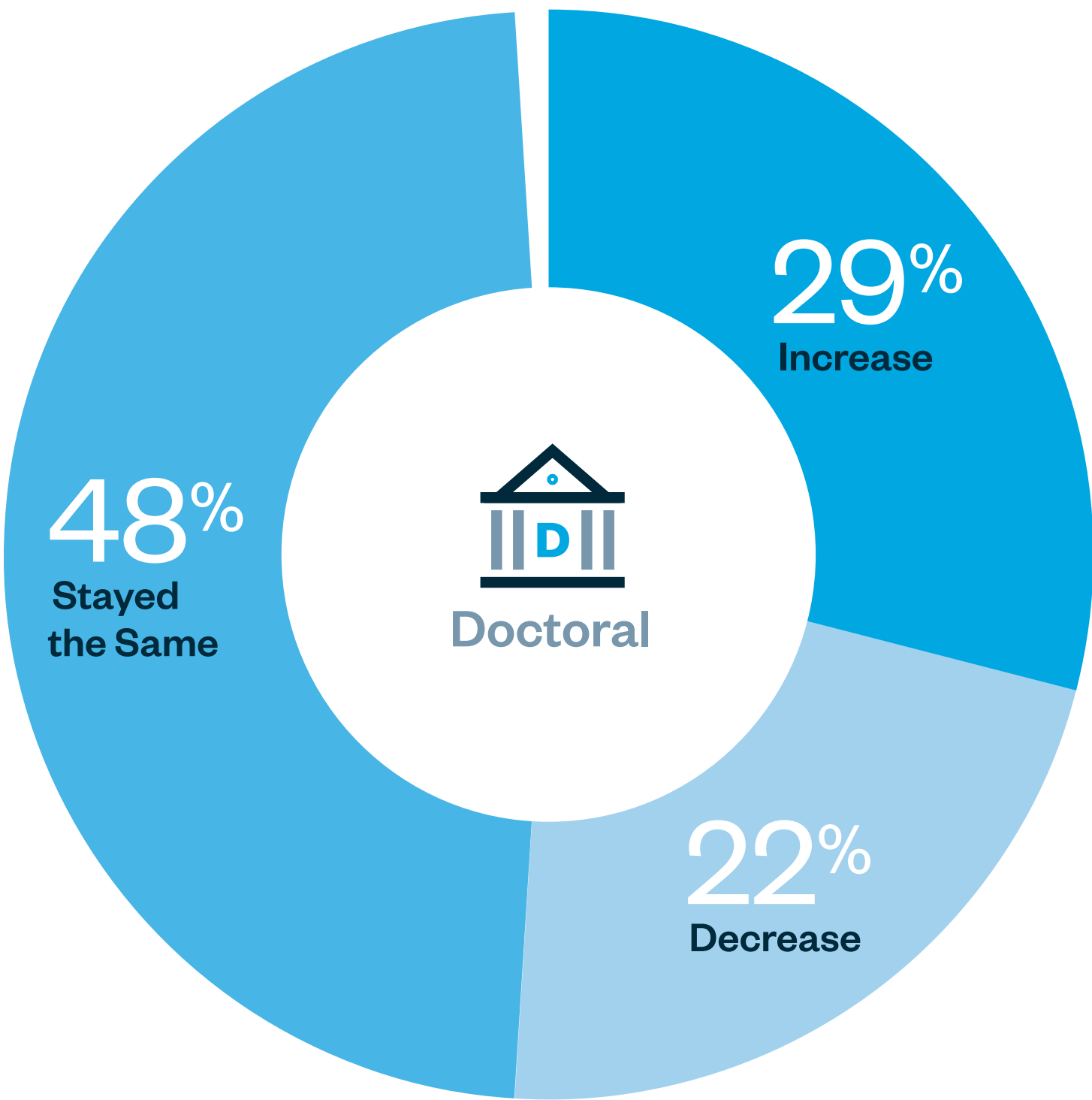
Max
15.00%

Min
0.27%



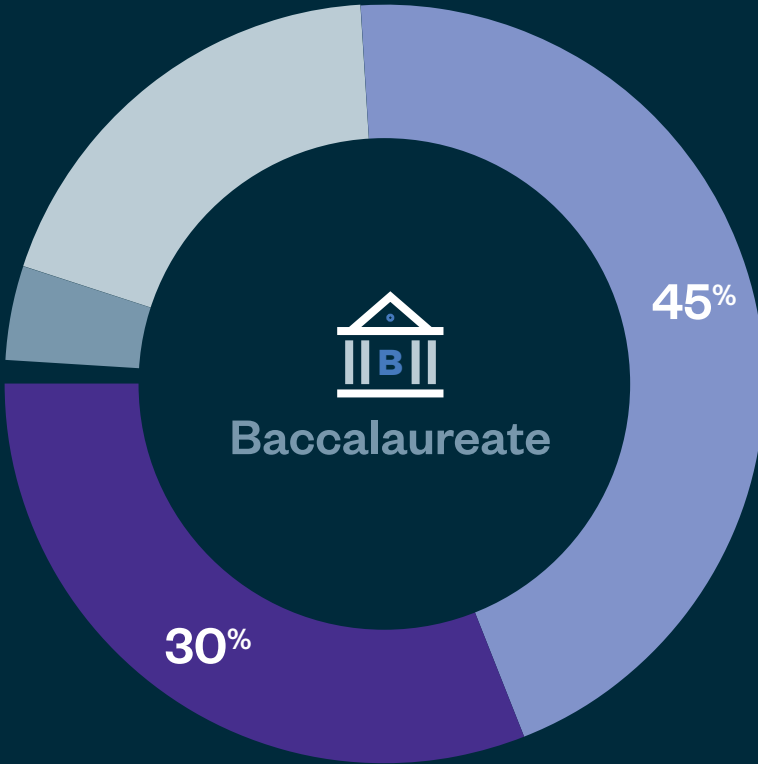
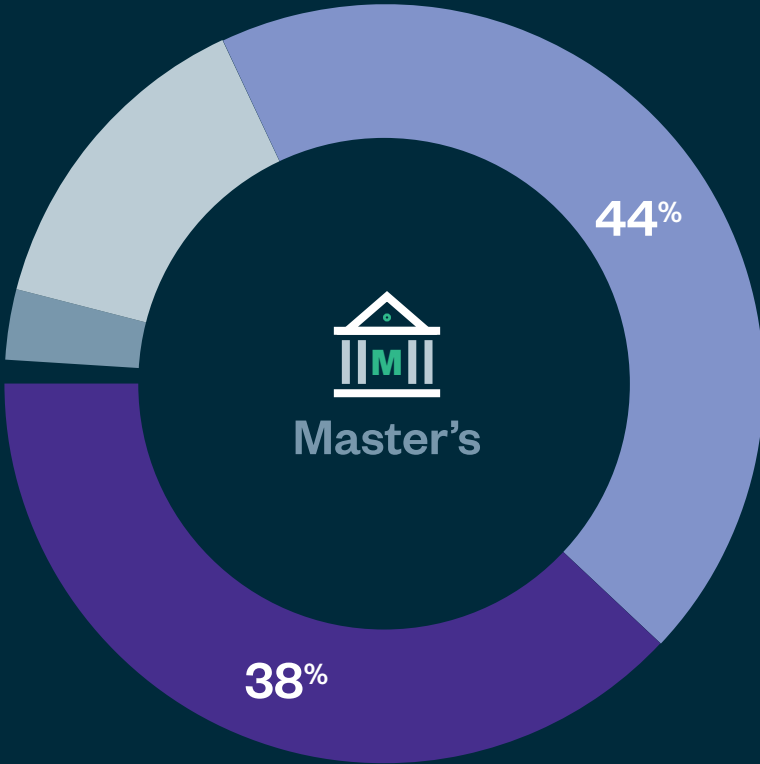
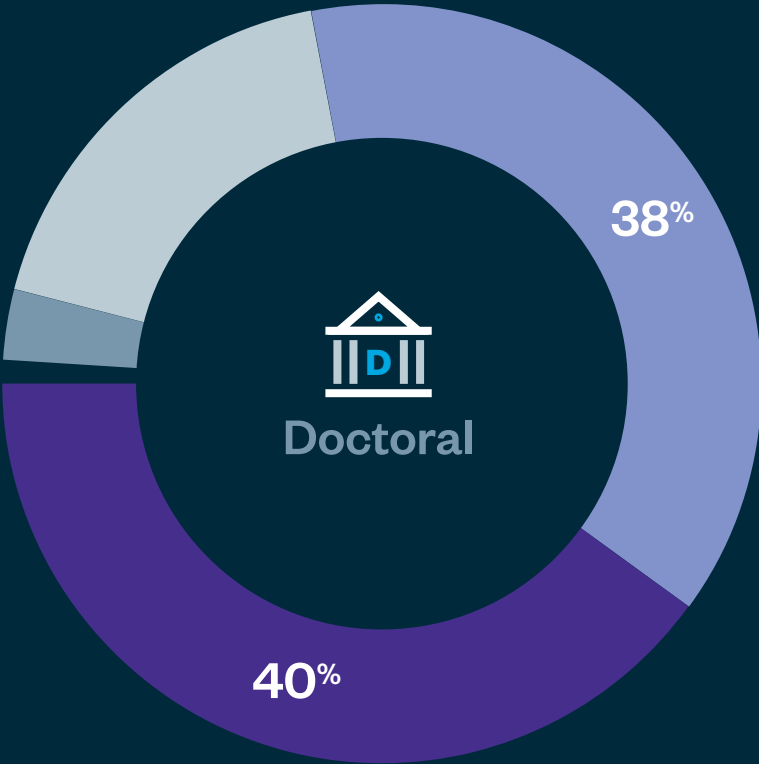
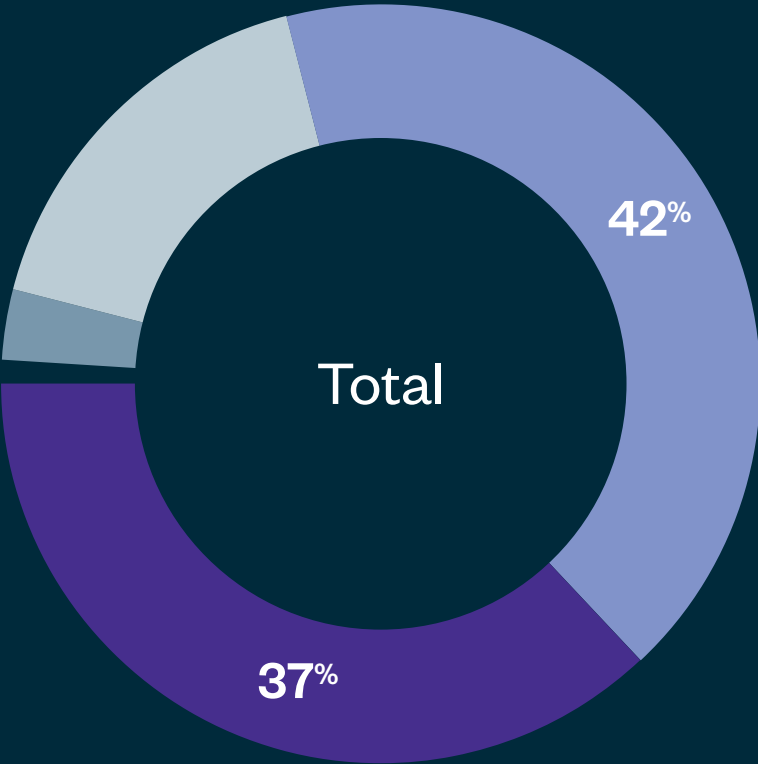
Change in Marketing Department Budget in Last Year

Gaps = don't know



Budget & Resources / Overall Budget

Our marketing department has the budget needed to meet the expectations of leadership—agree or disagree?



Strongly Disagree/Disagree

79%

78%

82%

75%

Section 4 /

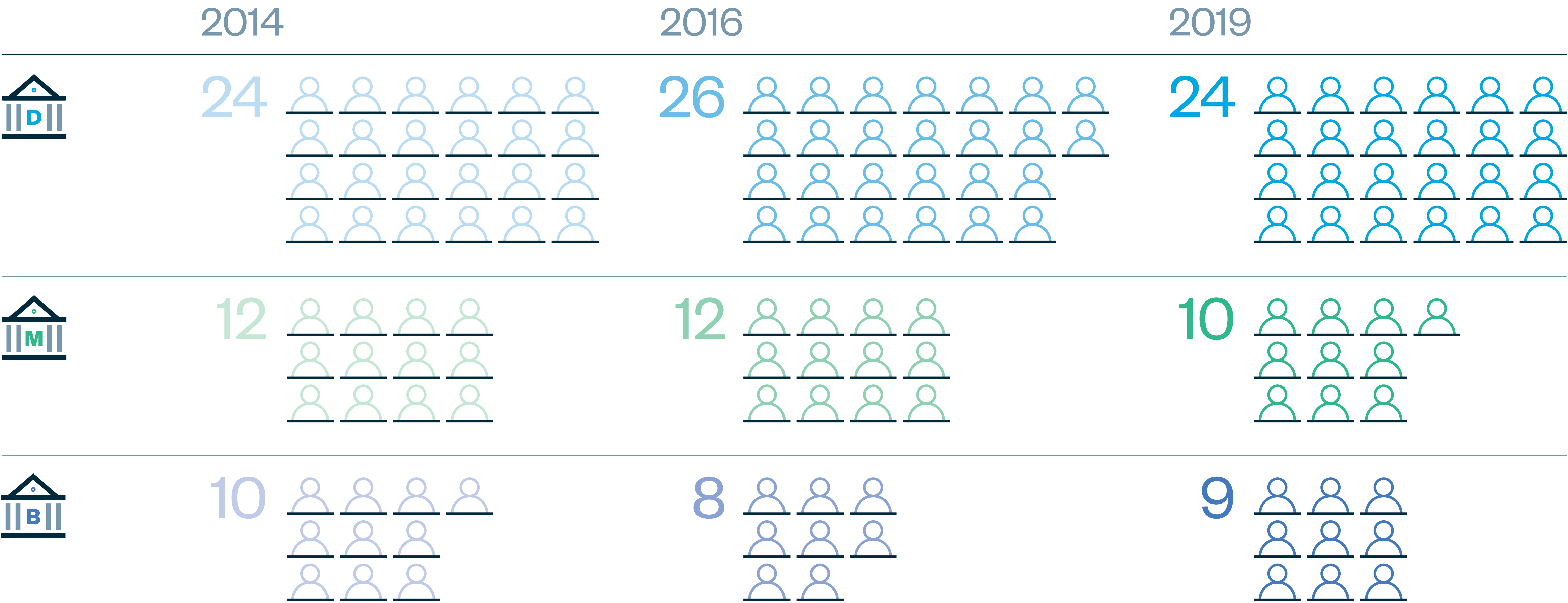
Marketing Department

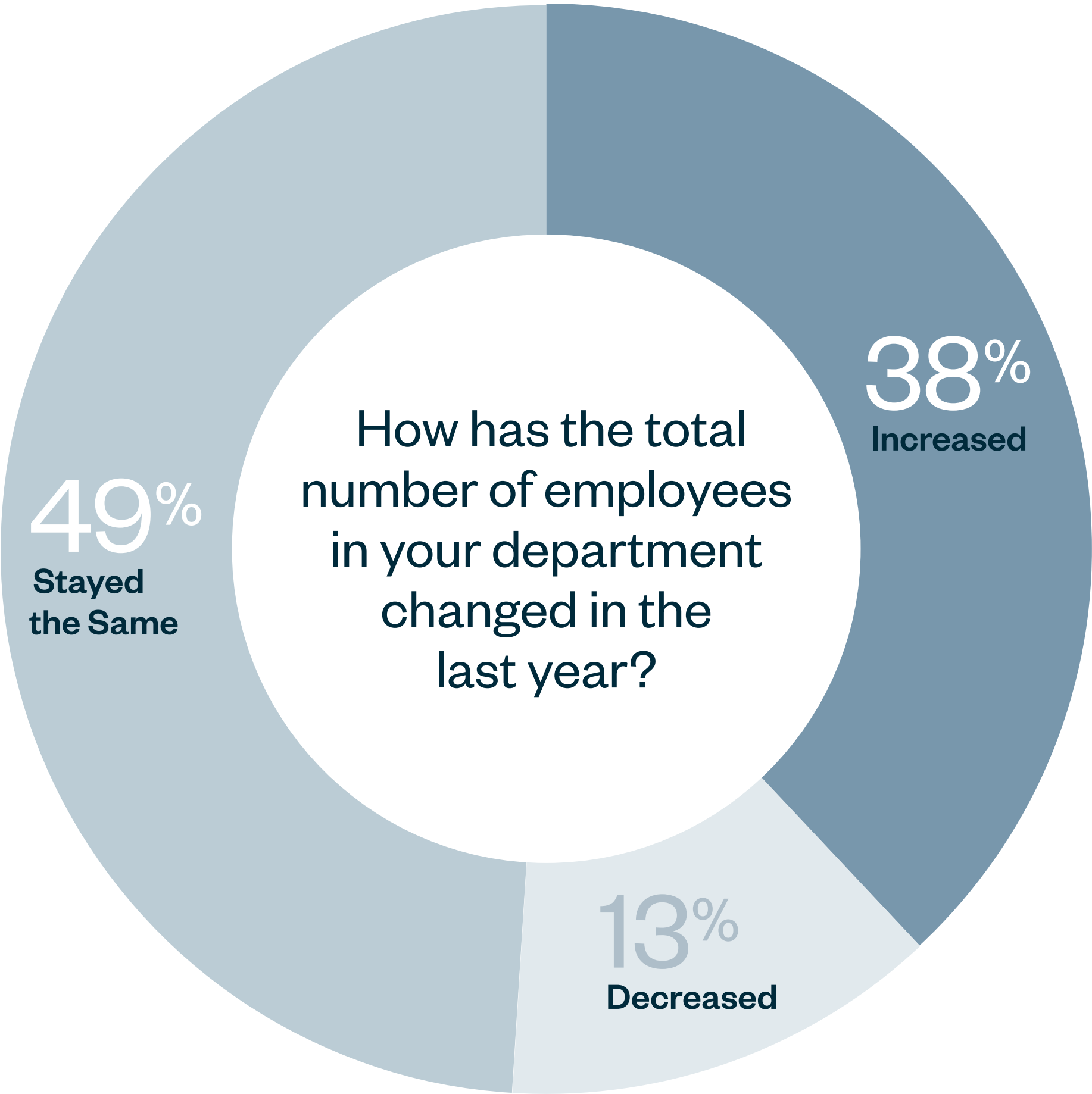
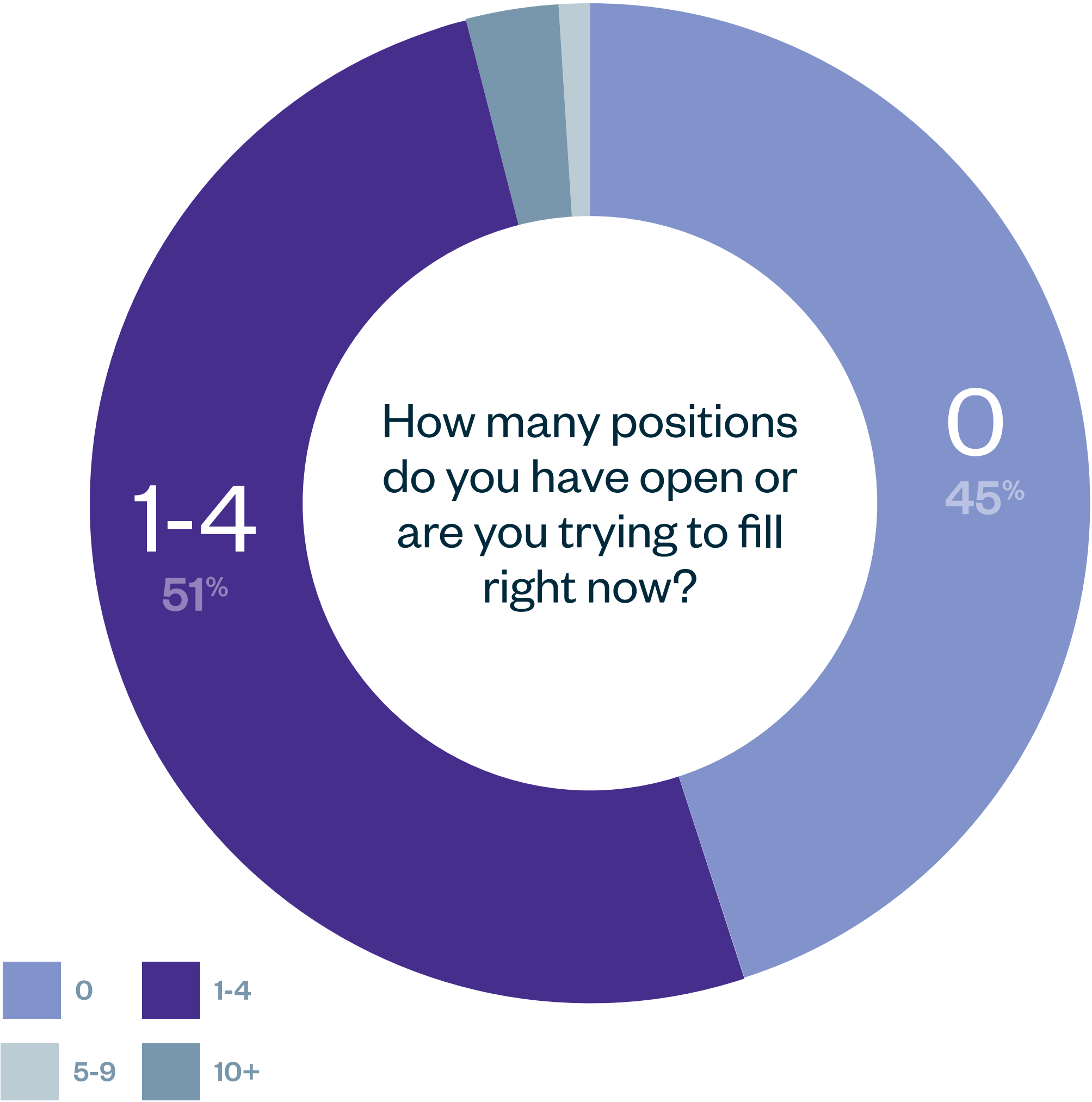
Optimize the size of your marketing team with the needs of your institution.

- There was little to no change in the mean number of full-time marketing department employees since 2016.
- However, more than one-third of institutions have increased the number of employees in the last year.
- More than half of the respondents reported they currently have open positions to fill.
- More than 3 in 4 marketers do not have the staff they need to meet the expectations of leadership.
- Most marketing departments use freelancers monthly and freelance support is most often used for graphic design, photography, copywriting, and video.



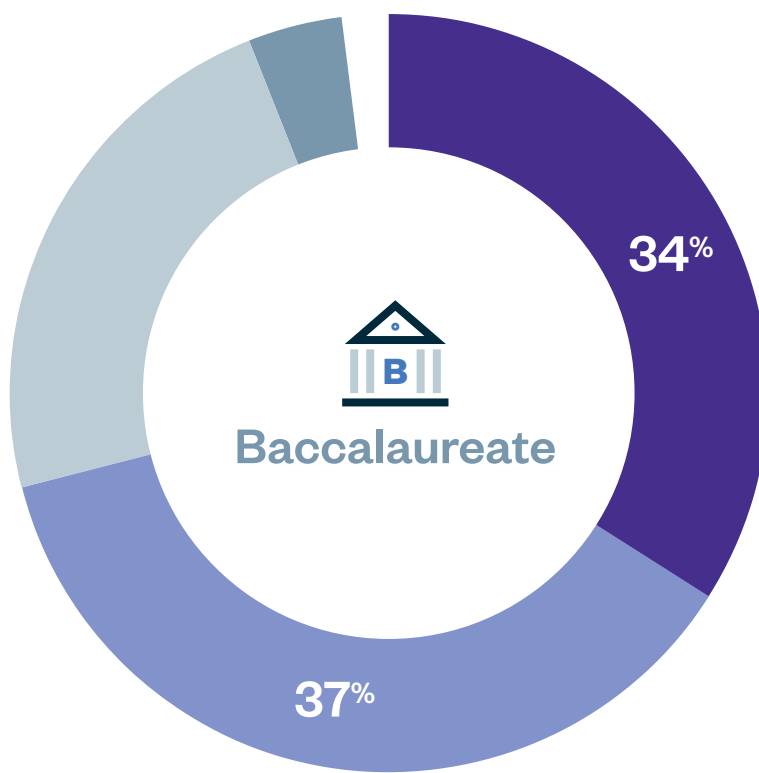
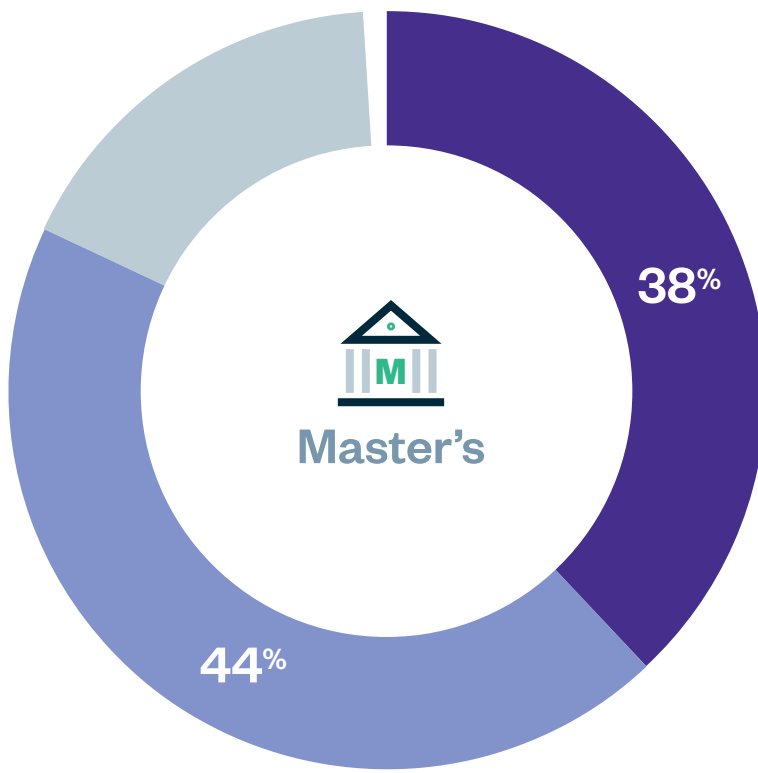
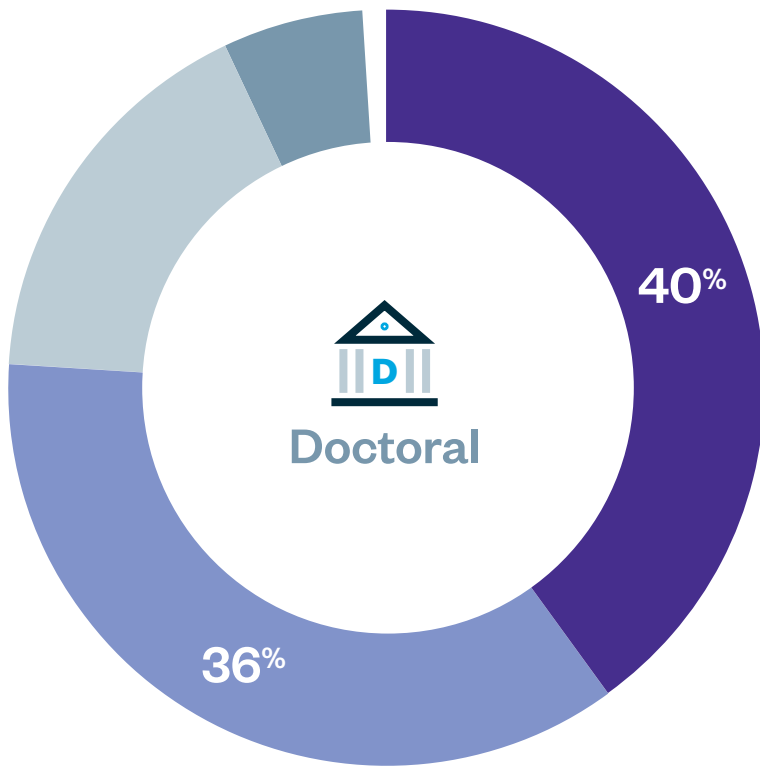
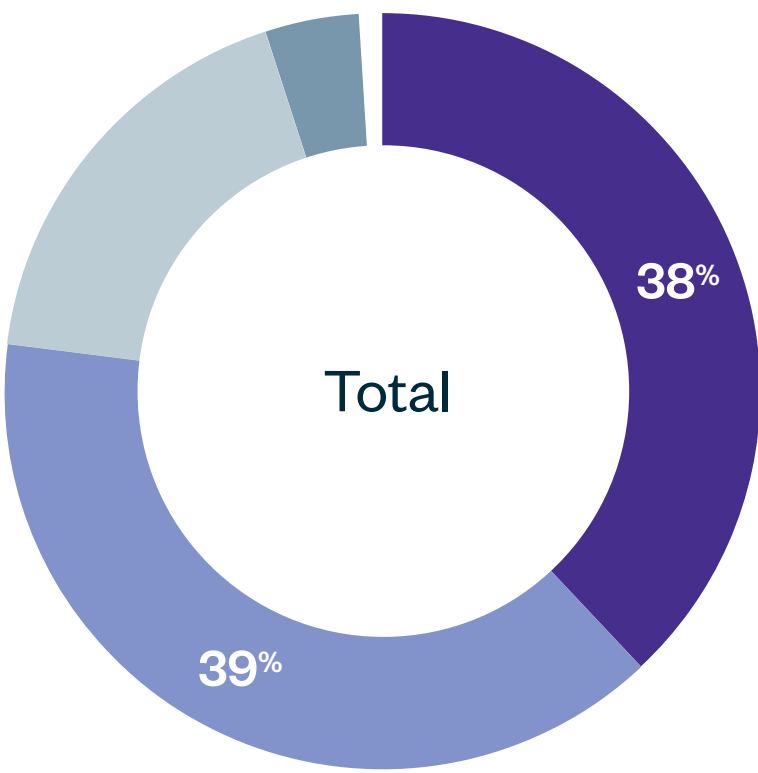
Average Number of Full-Time Employees





Marketing Department / Staffing Needs

Our marketing department has the staff needed to meet the expectations of leadership—agree or disagree?



Strongly Disagree/Disagree

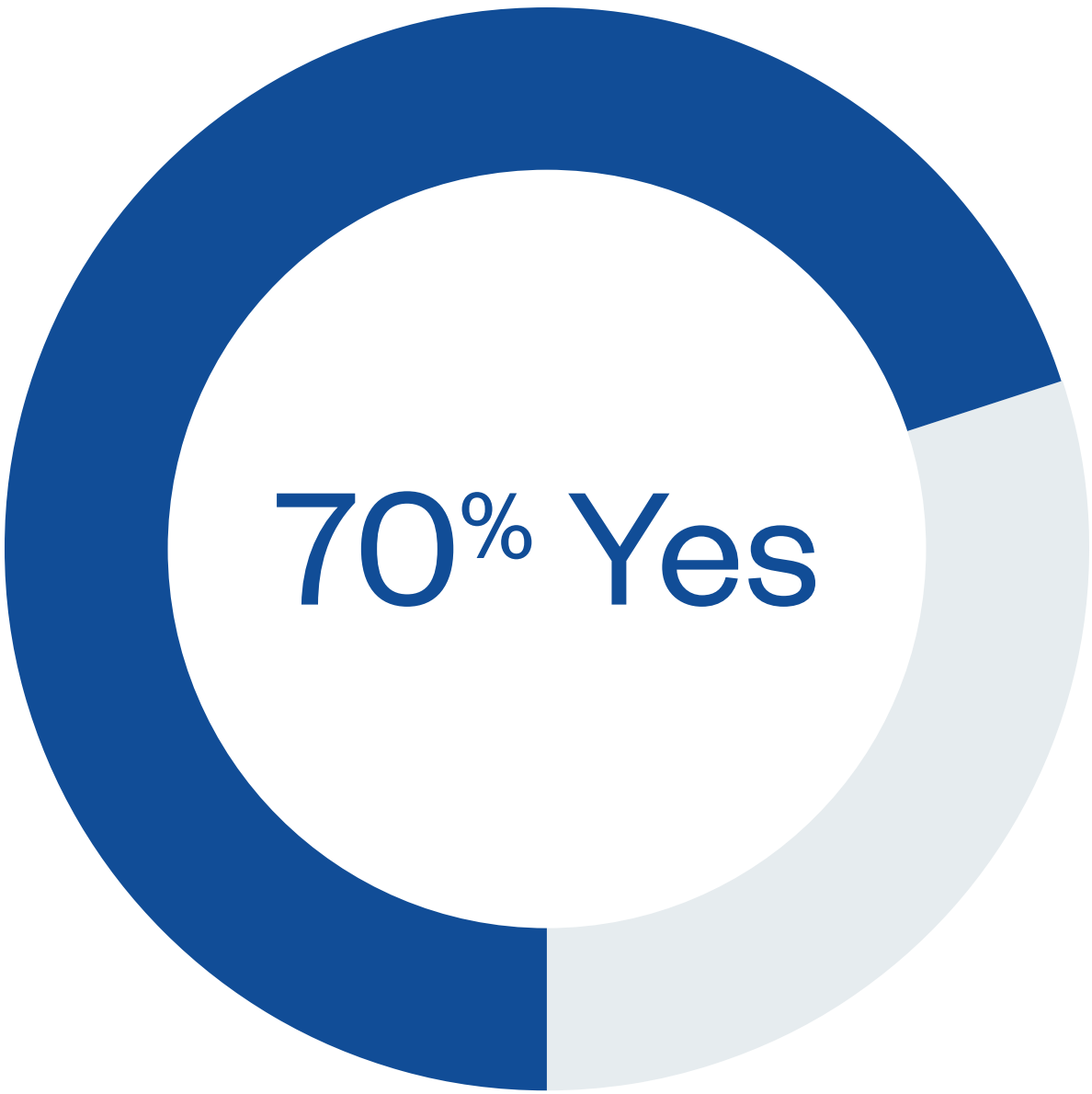
77%

76%

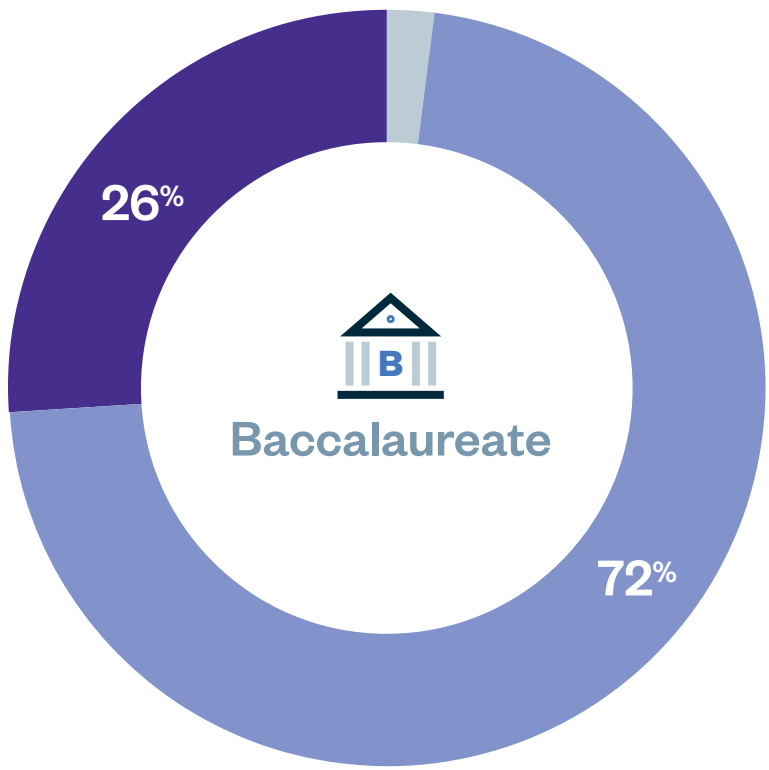
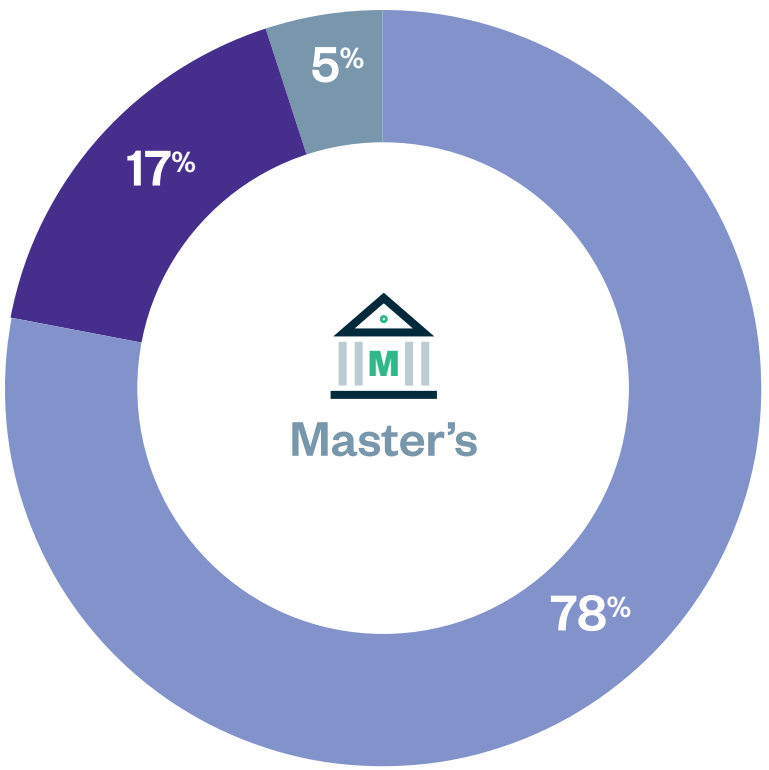
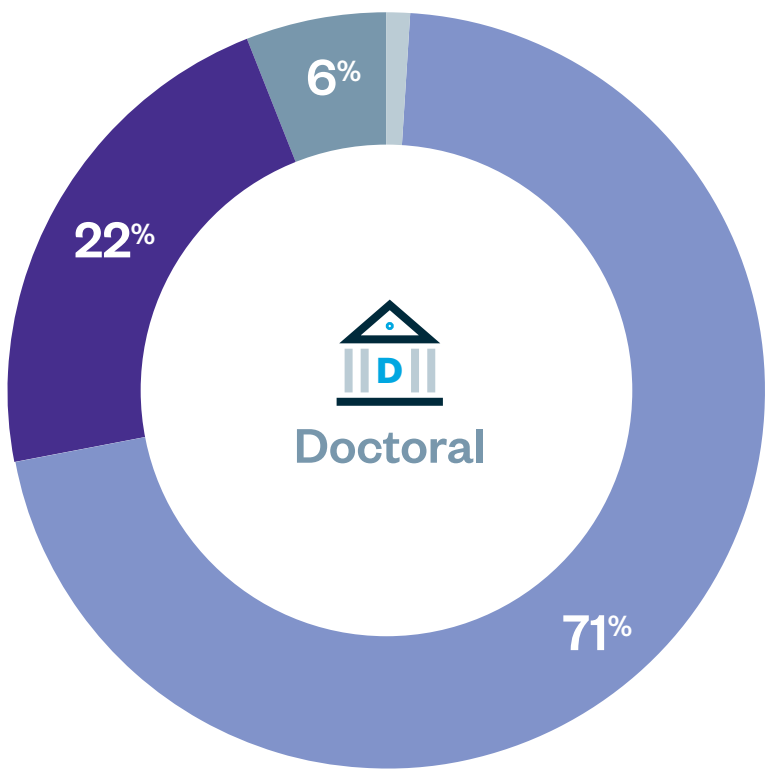
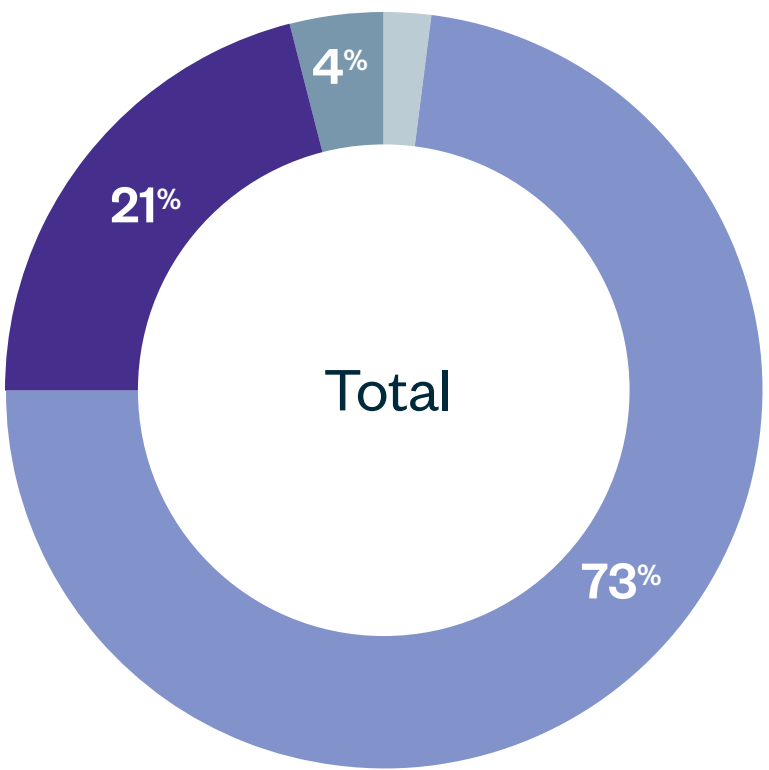
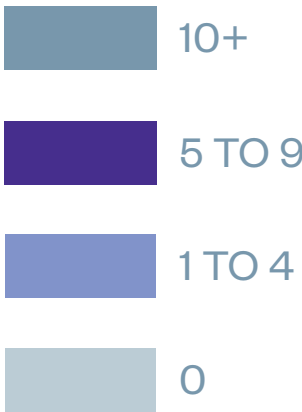
82%

71%

Do you regularly use freelancers to support your department?



Of those who regularly use freelancers, 73% use 1-4 freelancers in a typical month.



Section 5 /

Metrics, Objectives, Priorities & Effectiveness

Assess the success of your marketing efforts.

- Almost all lead marketers agree that strengthening their institution's reputation is a fundamental driver behind their long-term goals.
- Most lead marketers say their brand extends to all colleges, schools, and departments within their institution.
- While a majority of lead marketers grade the effectiveness of their department as a B (59%), approximately the same number grade themselves an A (21%) as a C or D (20%).
- Lead marketers who rate their departments as an A or B have more staff and use more freelancers, but don't necessarily have larger budgets than those assessing their departments a C or D.
- Those with A rating are more likely than the average to report increases in enrollment, giving, and reputation.



Assess the success of your marketing efforts.

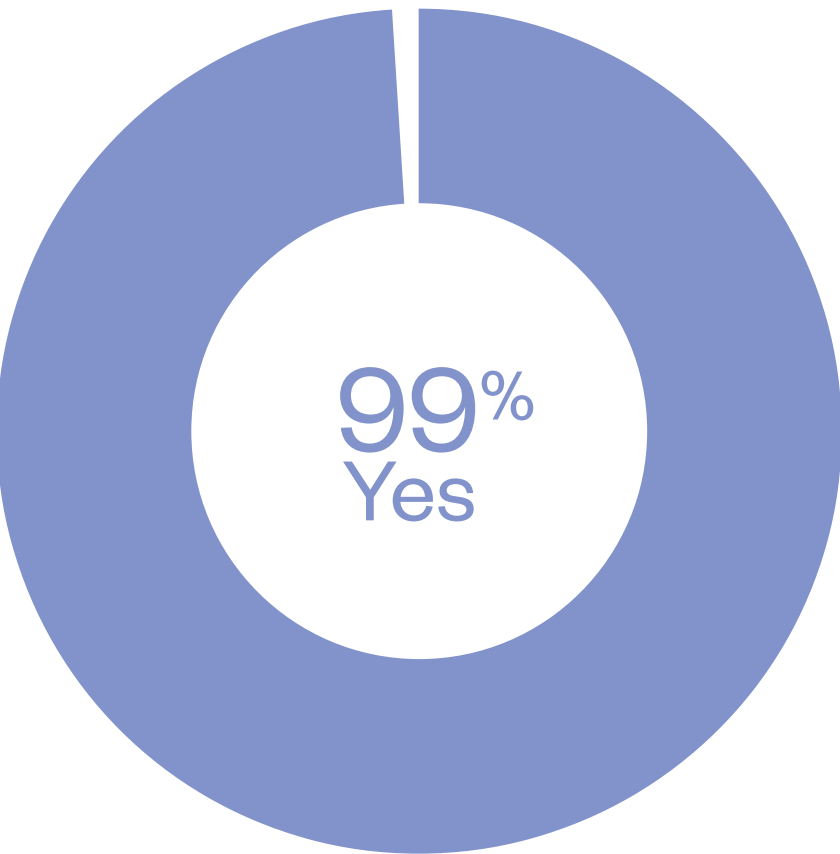
- Majority say their president uses undergraduate enrollment to measure success, but an alarming percentage report that success is measured by anecdotal opinions.
- More marketers say their president relies on anecdotal opinions than many quantifiable measures. Only 1 in 3 are using periodic brand tracking to measure success.
- Only 1 in 3 say the president uses measurements of brand strength as a metric of success.
- 3 in 4 lead marketers say their institution has a documented brand strategy—a significant increase from 2016.
- While most institutions have brand strategy in place, few are regularly reporting key metrics to leadership.



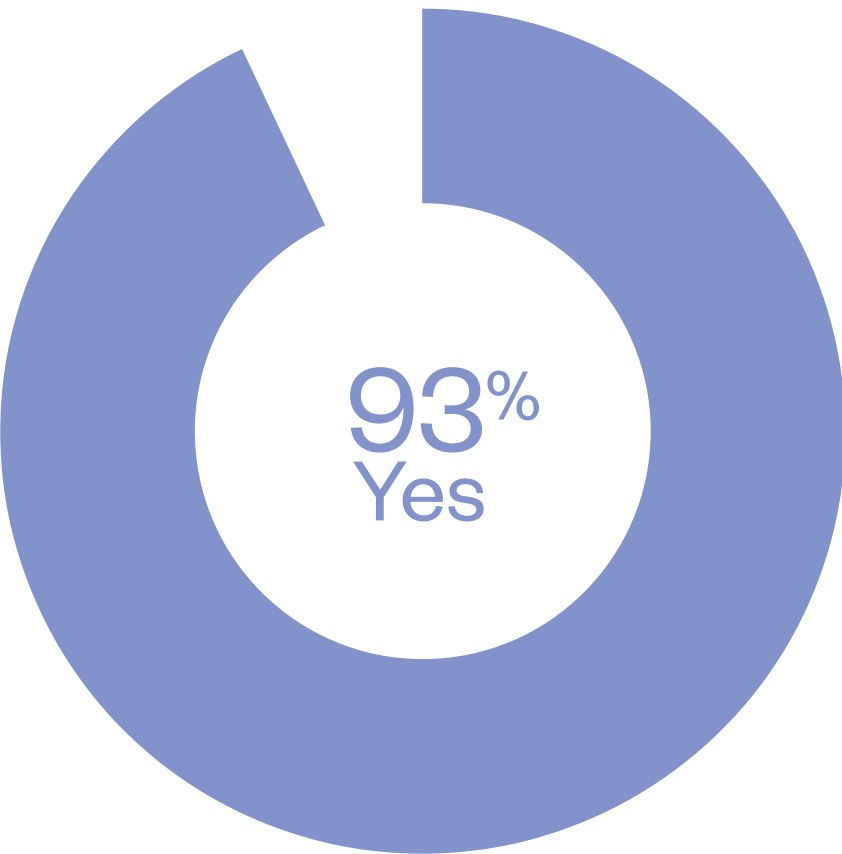


Metrics, Objectives, Priorities & Effectiveness / Benchmarking Department Standards

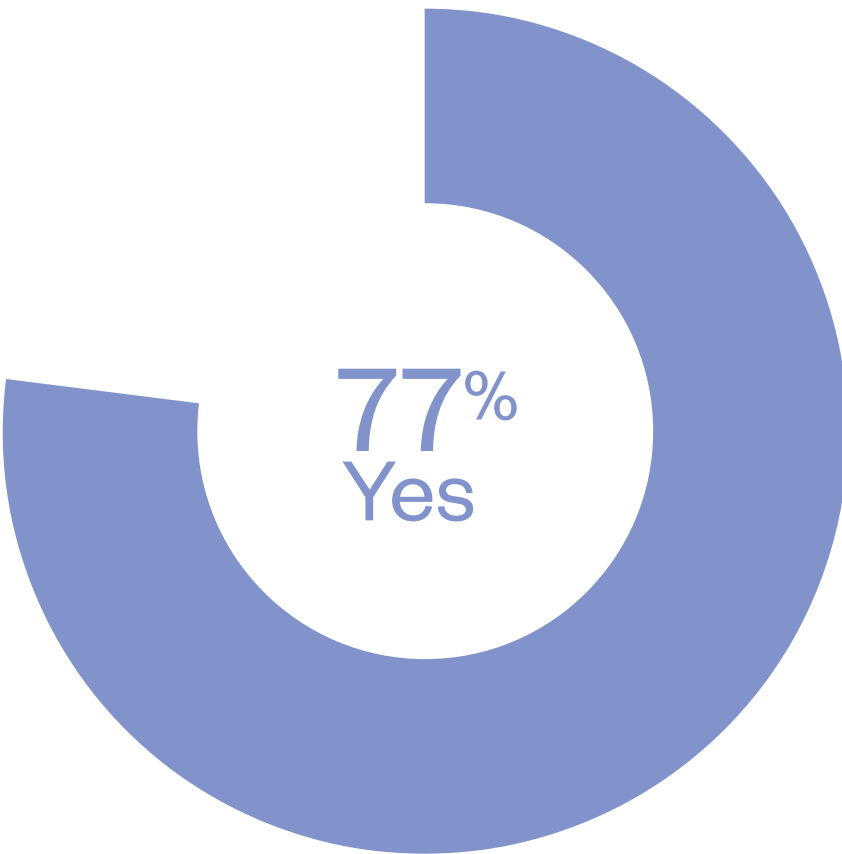
Visual Identity Guidelines



Brand Guidelines

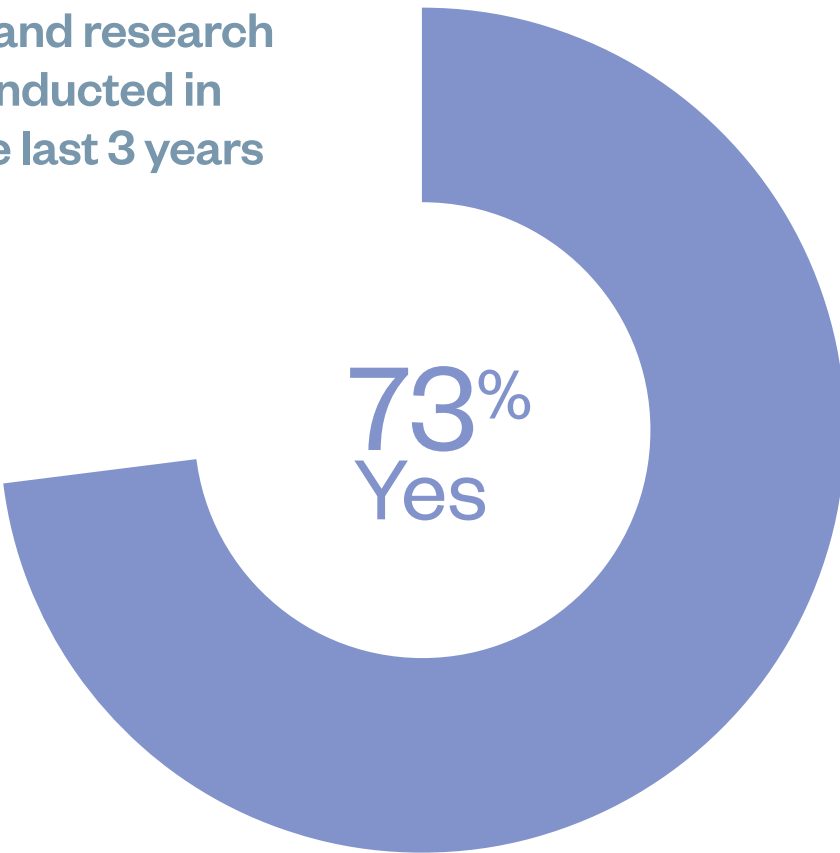


Documented Brand Strategy

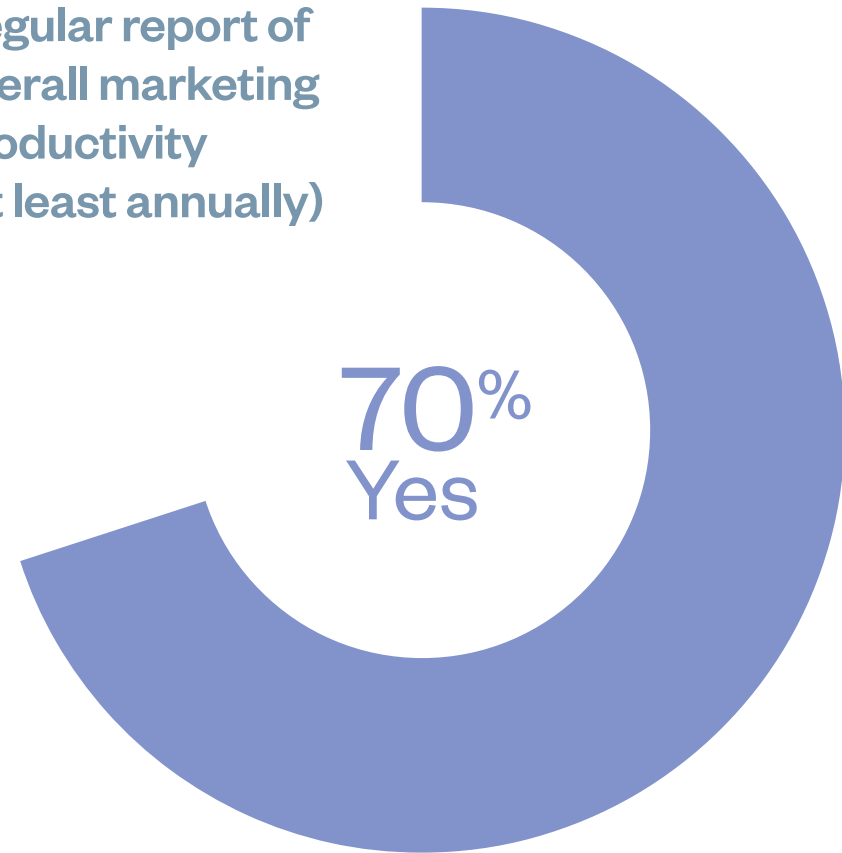


In 2016, only 66% of respondents reported having a written/documented brand strategy

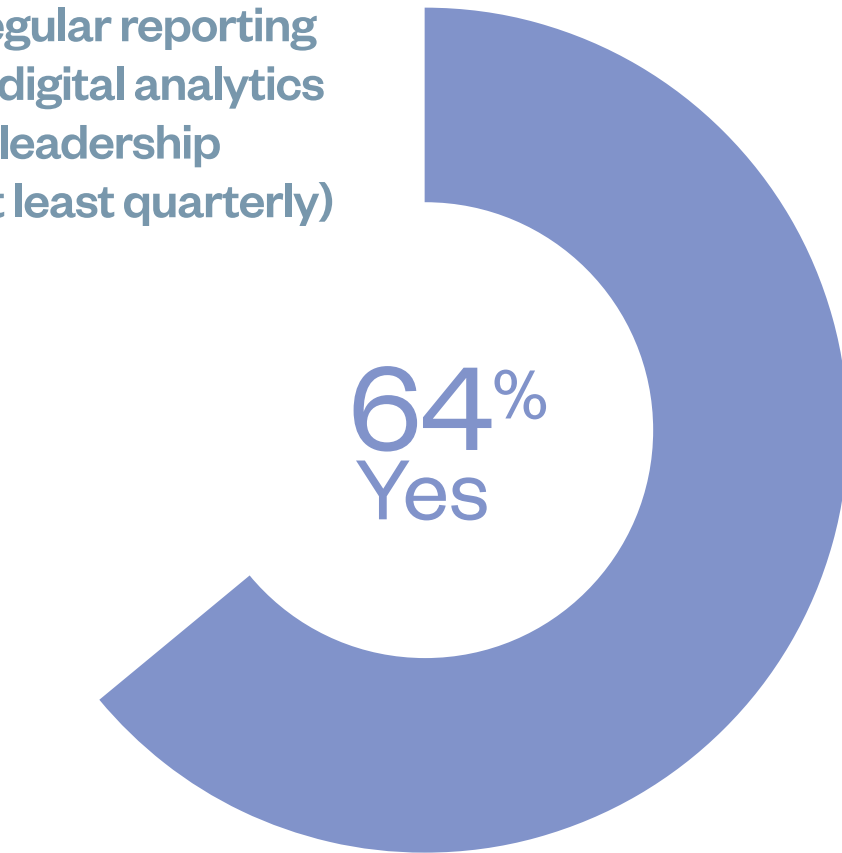
Brand research conducted in the last 3 years



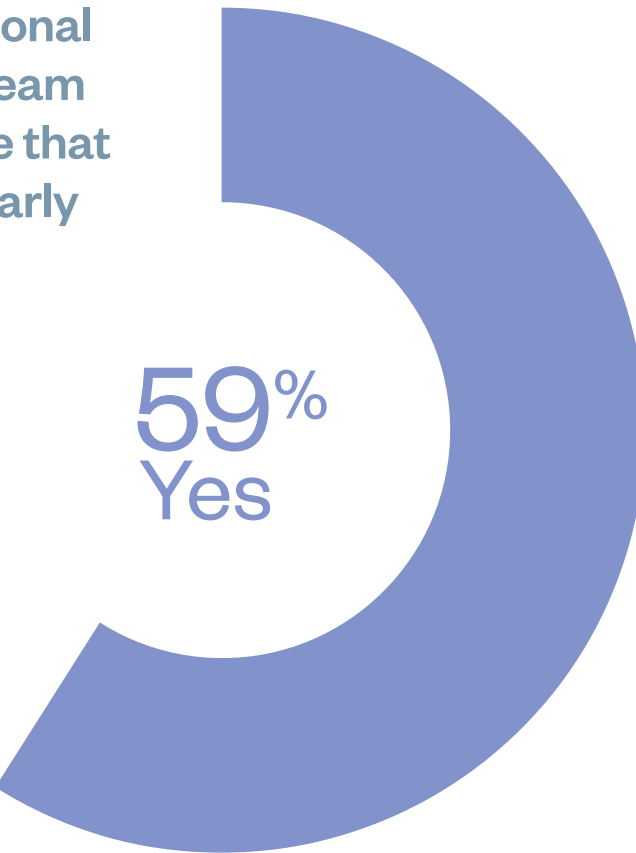
Regular report of overall marketing productivity (at least annually)



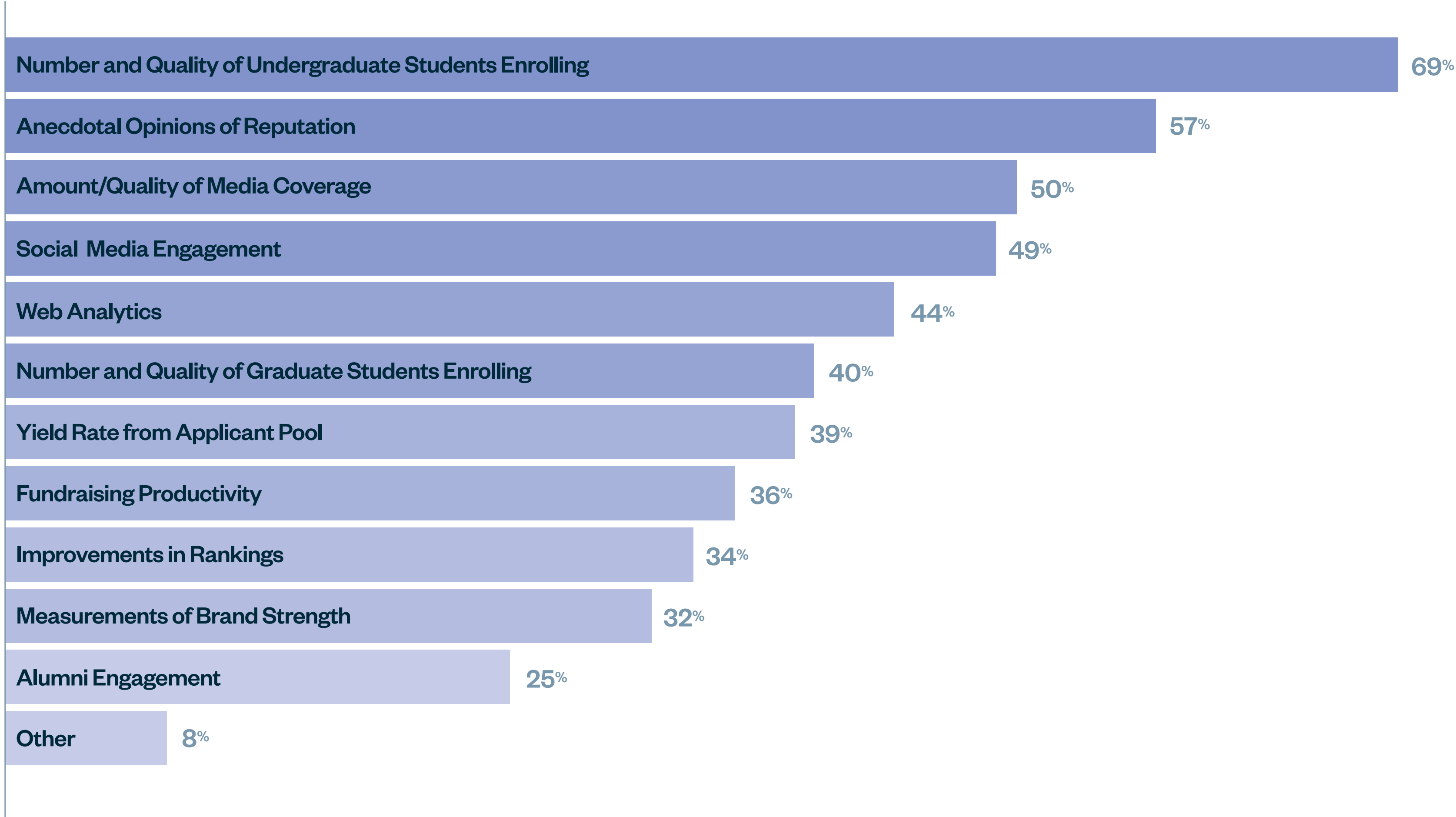
Regular reporting of digital analytics to leadership (at least quarterly)



Cross-divisional marketing team or task force that meets regularly



Top metrics used by the president or chancellor to gauge the success and impact of the marketing department:



Majority say their president uses UG enrollment to measure success, but an alarming percentage report that success is measured by anecdotal opinions.

Self-Reported Marketing Effectiveness Assessments

The mean grade level for institution’s overall marketing effectiveness over the last 3 years is between a B and B+, grades ranged from a D to A+

GRADE A 21% Marketing Budget per Enrolled Student \$623 / Institutional Budget per Enrolled Student \$40,322 / Reported UG Enrollment Increase 51% Reported Grad Enrollment Increase 42% Staff Size 21 Use Freelancers 71% Reported Annual Fund Giving Increase 78% Reported Strength of Reputation Increase 75%	GRADE B 59% Marketing Budget per Enrolled Student \$429 / Institutional Budget per Enrolled Student \$35,550 / Reported UG Enrollment Increase 39% Reported Grad Enrollment Increase 36% Staff Size 16 Use Freelancers 75% Reported Annual Fund Giving Increase 52% Reported Strength of Reputation Increase 48%	GRADE C OR D 20% Marketing Budget per Enrolled Student \$463 / Institutional Budget per Enrolled Student \$34,403 / Reported UG Enrollment Increase 19% Reported Grad Enrollment Increase 18% Staff Size 11 Use Freelancers 56% Reported Annual Fund Giving Increase 39% Reported Strength of Reputation Increase 19%
---	---	--

Section 6 /

Digital & Traditional Advertising

Recognize your needs for both digital and traditional advertising.

- More than 2 in 3 institutions increased digital advertising spend, while only 15% increased traditional advertising spend.
- While a significant number of marketers say they have decreased their budget for traditional ad spending, just as many say their budget hasn't changed.
- The mean for traditional ad budgets are not far below the mean for digital ad budgets, but the range across all institution types varies greatly.



Digital & Traditional Advertising / Budget Spending

Amount Spent on Digital Advertising

 Doctoral

Mean
\$377,136
Median
\$200,000

 Master's

Mean
\$198,552
Median
\$135,000

 Baccalaureate

Mean
\$103,377
Median
\$60,000

Amount Spent on Traditional Advertising

 Doctoral

Mean
\$233,790
Median
\$120,000

 Master's

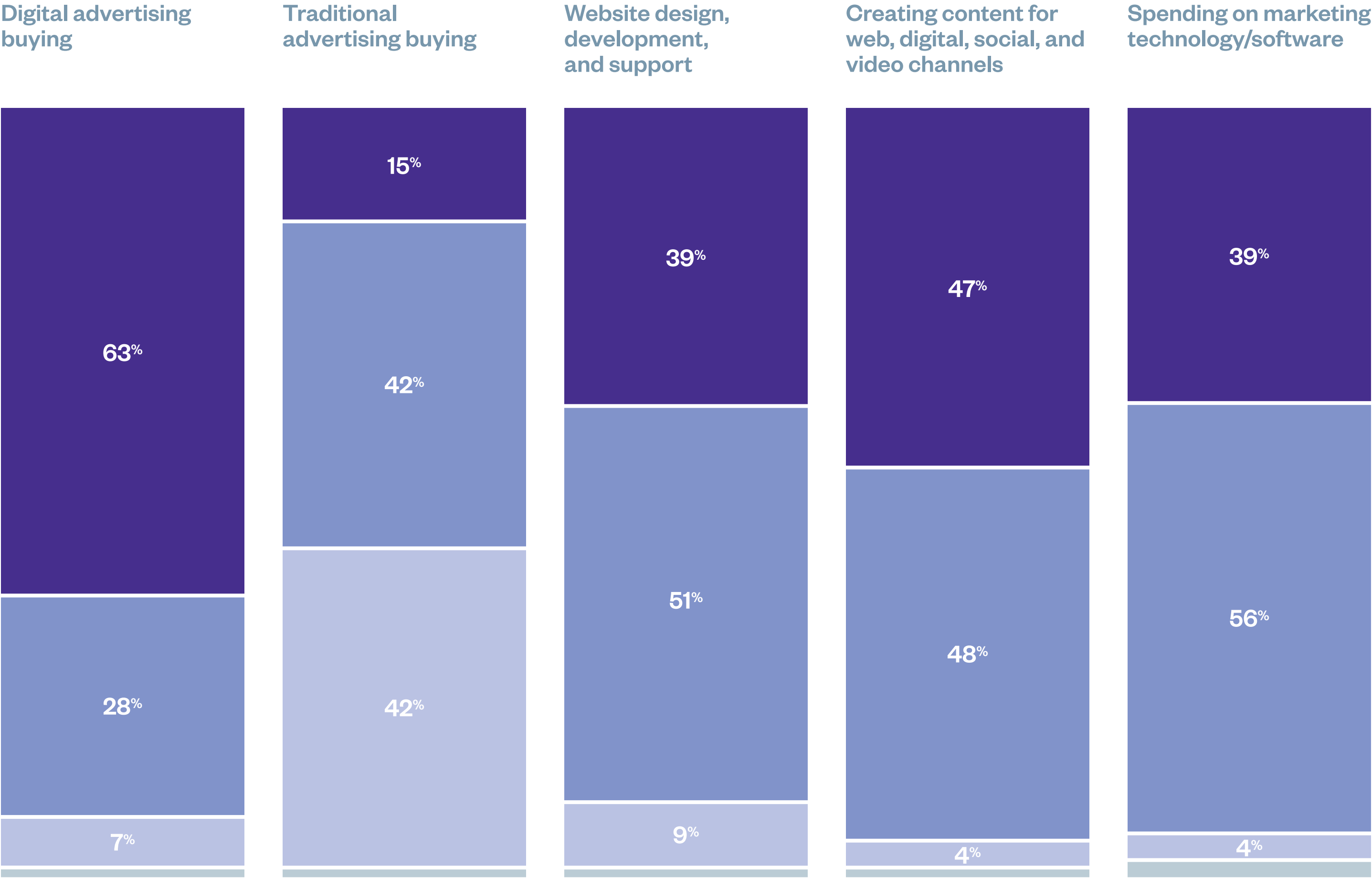
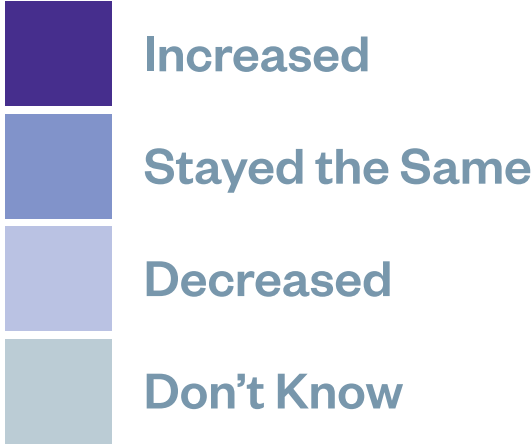
Mean
\$173,250
Median
\$122,500

 Baccalaureate

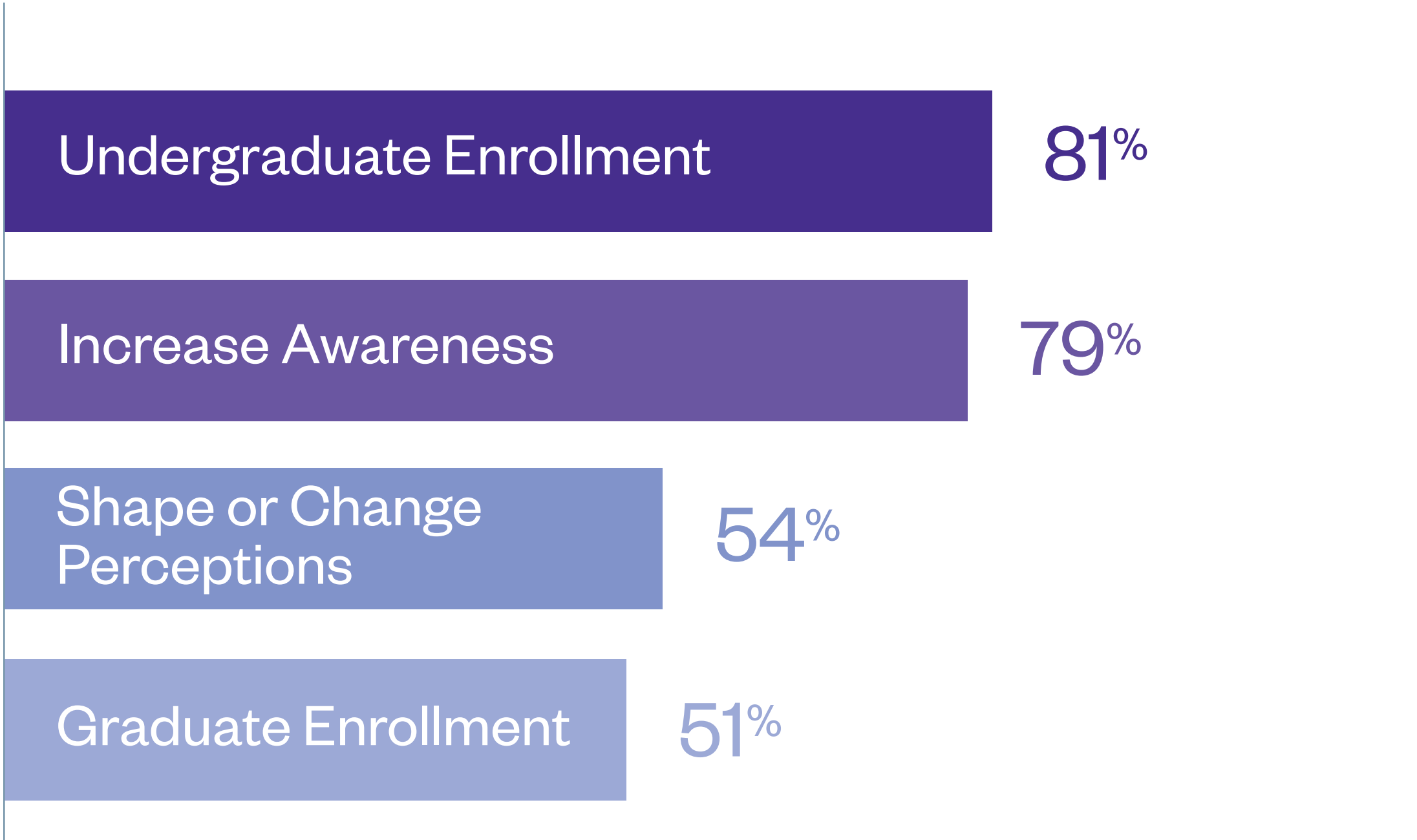
Mean
\$74,263
Median
\$200,000

Digital & Traditional Advertising / Budget Spending

Budget
Spending
Changes



Primary Objectives of Advertising

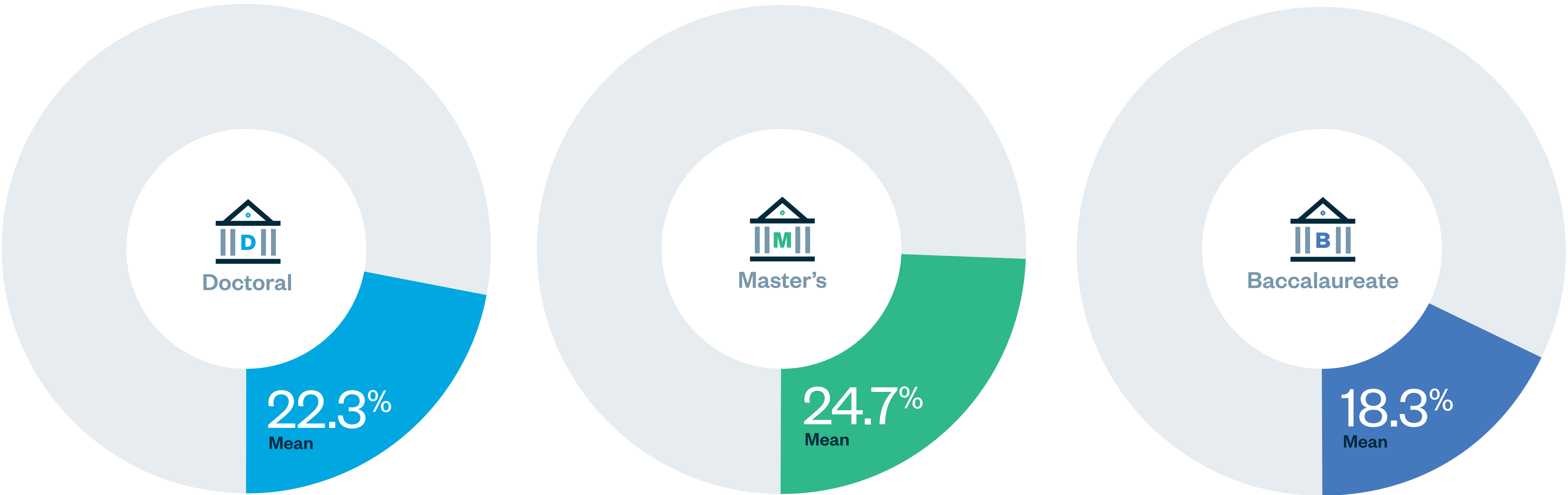


Calls-to-action included in advertising:

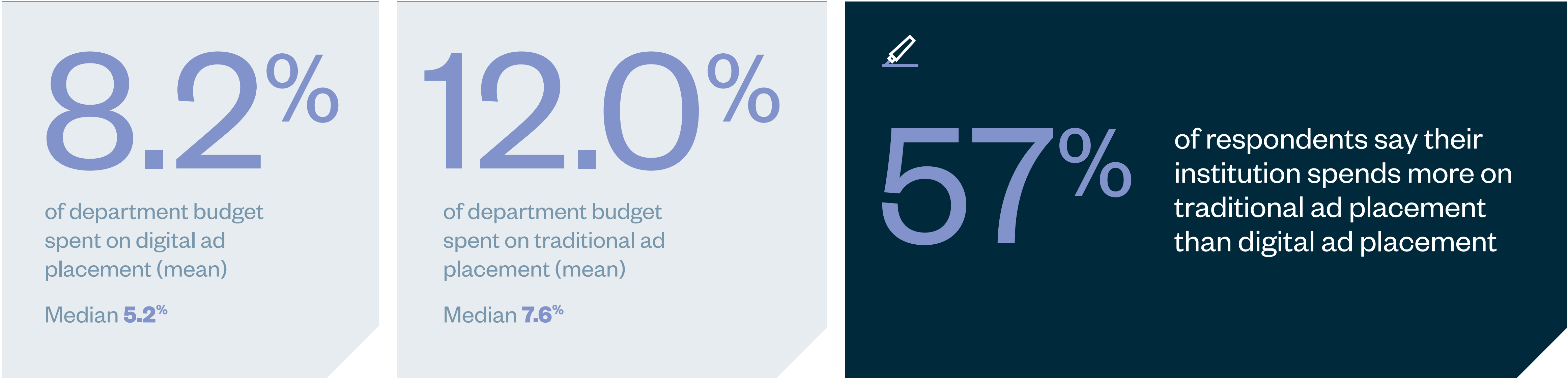
- 79% Apply now
- 77% Click to visit a targeted landing page
- 72% Schedule a visit



Advertising as a Percentage of Total Marketing Budget



Advertising as a Percentage of Total Marketing Budget



Section 7 /

Keeping Up With Digital Trends

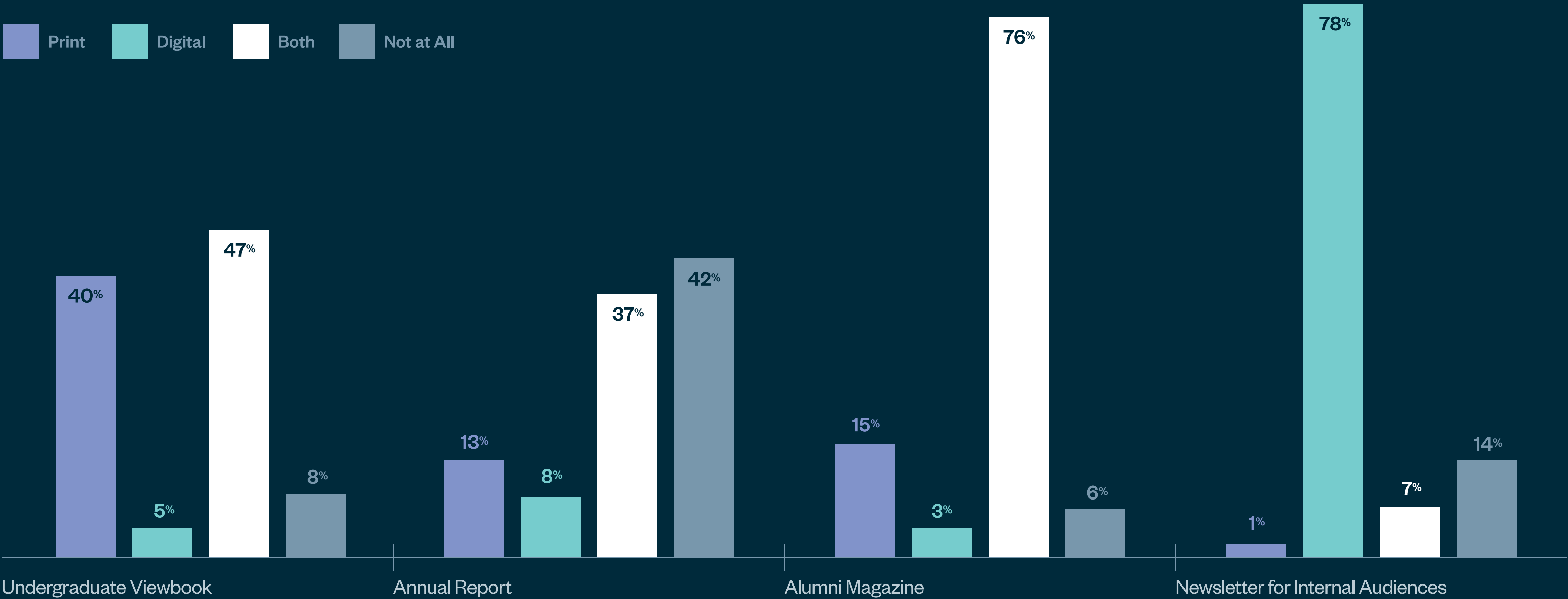
Print is still a player, but digital must be a focus.

- Most institutions haven't abandoned print viewbooks. Nearly half produce both print and digital, and 3 in 4 produce only print versions.
- Most institutions produce both print and digital versions of their alumni magazine.
- The two main players for Content Management System (CMS) solutions are Drupal and WordPress.
- Nearly half of institutions use Slate as their Customer Relationship Management (CRM) solution.
- Only one in three institutions currently integrate their CMS with their CRM.
- 49% of respondents have completed a comprehensive redesign of their primary institutional website within the past two years.



Keeping Up With Digital Trends / Production

What is produced via print, digital, both, or not at all?



Top Content Management System Solution

WordPress 25%
Drupal 24%

Other Players:

OmniUpdate 12%
Cascade 11%
Terminal4 3%
Ektron 2%
Big Tree 2%
Ingeniux 1%
Other 17%

If Drupal, what version?

30% 7.X 54% 8.X 16% Not Sure

Don't Know

3%

Top Customer Relationship Management Solution

Slate 47%

Other Players:

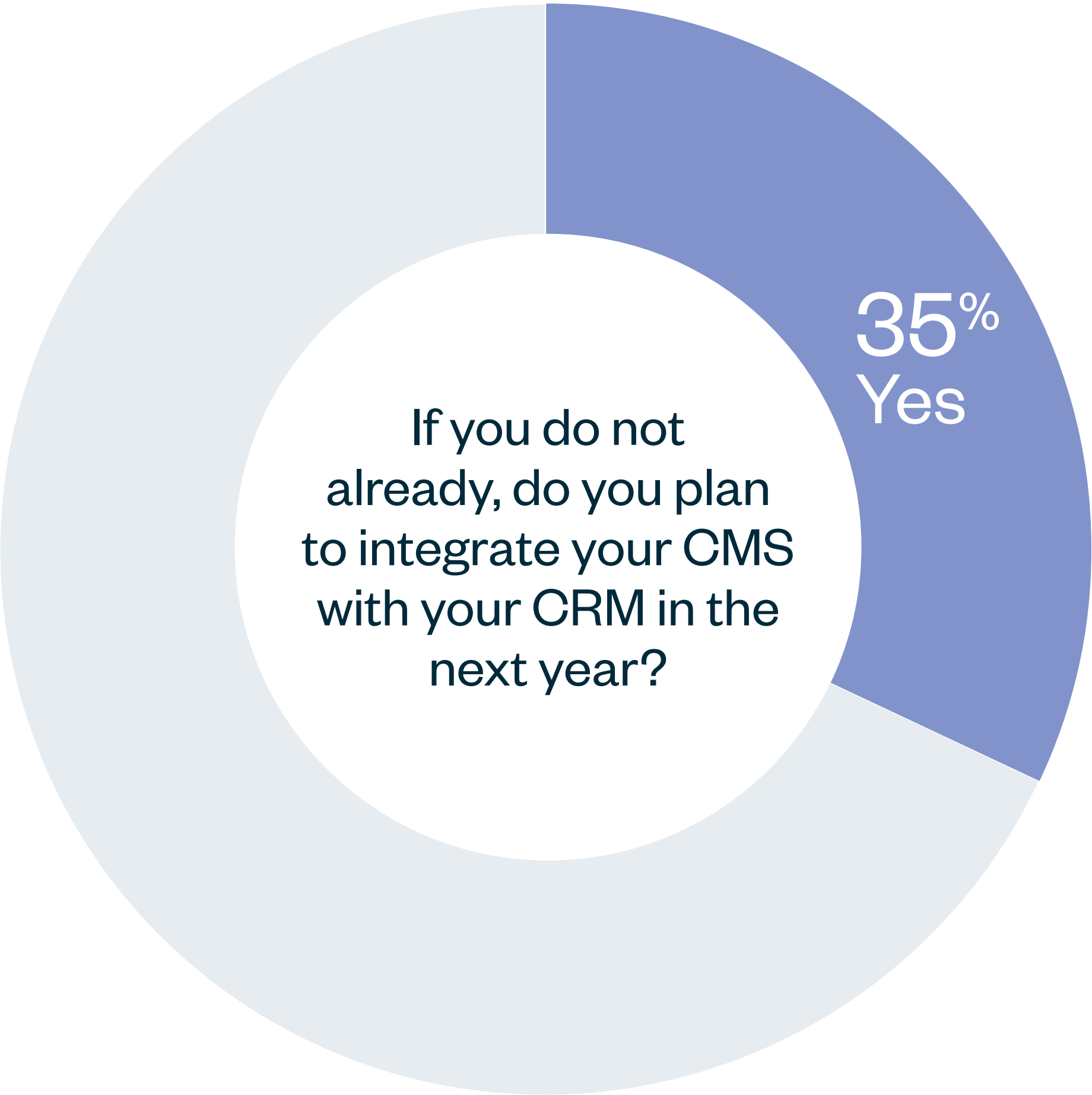
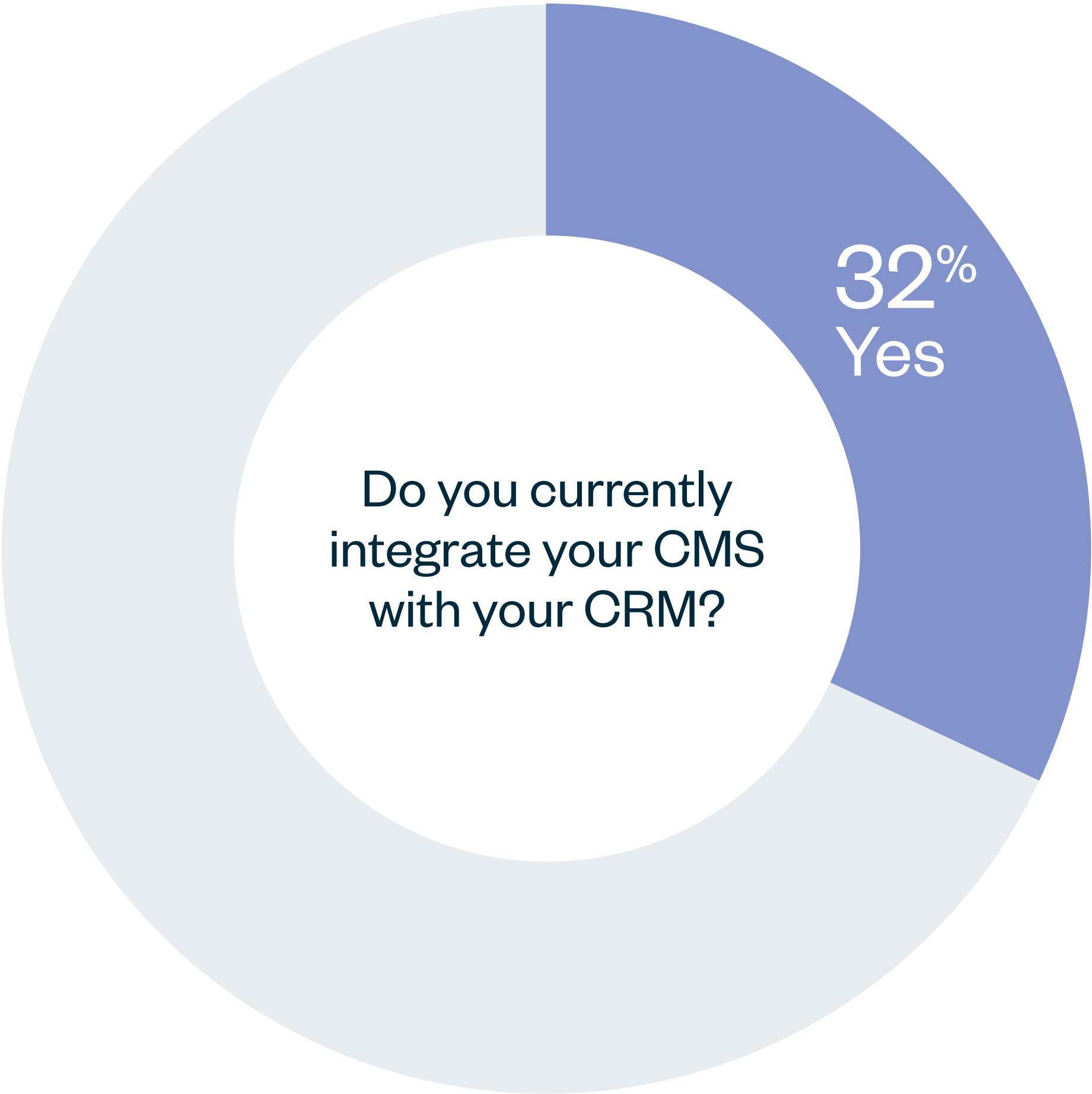
Salesforce 11%
Ellucian 9%
TargetX 9%
Hubspot 1%
Other 13%

Don't Have a CRM

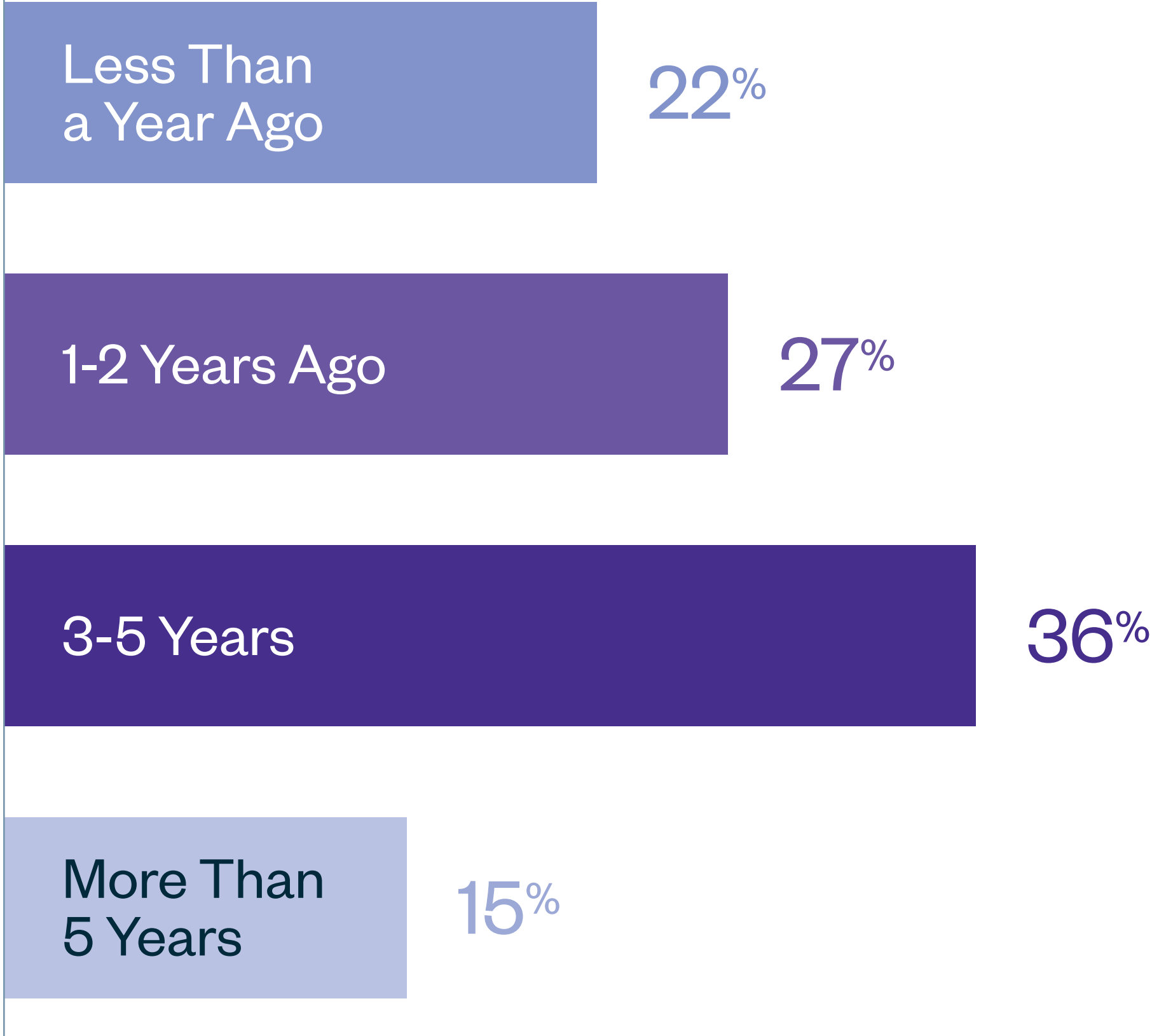
4%

Don't Know

2%



When was the last comprehensive redesign of your primary institutional website?



49% of respondents have completed a comprehensive redesign of their primary institutional website within the past two years.



Section 9 /

The Questions We're Asking

The Questions We're Asking

- “ Is marketing communications in higher ed stagnating or getting stronger? What are the ways that it can be improved?
- “ Most institutions have documented brand strategies in place. But are we making progress in how we measure impact? What is to be measured?
- “ Who matters when making the case for effectiveness? The president or chancellor? Your board? Faculty? Someone else?
- “ Technology has already disrupted higher ed. Do you have a roadmap in place to align your strategies with the technology needed to support them?
- “ Given the reported constraints on resources, alongside unfunded priorities with undefined goals, is it really worth spending any money on advertising?



Our intention in posing these questions is to ensure that this study is not seen as a static document, but rather the continual evolution of a tool — one that acts as a leverage point, a source of accountability, and a springboard calibrated to advancing the entire industry forward.

We encourage you to share this study with your peers, your institutional leadership, and with the next generation of higher ed marketers. Use it to have difficult conversations, to reassess priorities, to fight for more resources.

We also invite your feedback, not just to these questions posed, but to the pressing questions left in your mind after sorting through the research. Are we asking the right questions? Where should we go deeper? What other data are needed to help strengthen the marketing function across campuses nationwide?

The ethos of SimpsonScarborough is to follow where the data lead, which — as we all know — starts with asking the right questions.

Email us your thoughts, insights, and questions at CMOStudy@SimpsonScarborough.com

On behalf of our Alexandria,
Oakland, and Columbus offices,

Thank you.