

# THE HIGHER EDUCATION MARKETING SURVEY

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**NET NATIVES** X **THE**

# Welcome



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Times Higher Education



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# THE HIGHER EDUCATION MARKETING SURVEY

The Higher Education Marketing Survey (HEMS) aims to track how higher education marketers are responding to enrolment challenges, to understand priorities and challenges across the sector and to help empower decision-making.

The survey was designed by the research team at Net Natives, in collaboration with key stakeholders at Net Natives and Times Higher Education (THE). The survey was sent to higher education marketers globally across the sector by both Net Natives and THE. The survey was live between 23rd February and 29th March 2022.



**Responses** from **323** education marketers **worldwide**; including **95** responses in the **US sector**



Largest **segments** are from the **UK** and **US**



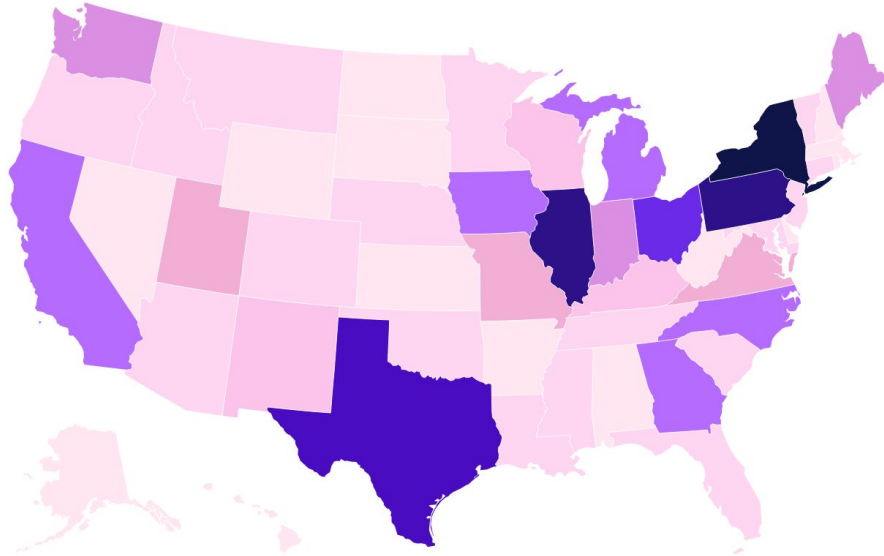
**Cross section** across types of **institutions** and **roles**



**Collaboration** between **Times Higher Education** and **Net Natives**

# Background and Demographics

## HEMS US States



## US institutions

	US Institution Types	Responses ▾
1.	Private Institution	54%
2.	Public Institution	41%
3.	Community College	3%
4.	Other - please specify	2%

## Represented roles

**68%**

of the respondents were either a Vice President, Director, or an Associate/Assistant Director

Key Findings  
**Highlights**

**Cost per enrollment, market share and lead time are the metrics that marketers wish they could track.**

**The biggest skills gap is in market analysis and audience research.**

**On average 55% of a marketing budget is allocated toward the “digital advertising bucket”.**

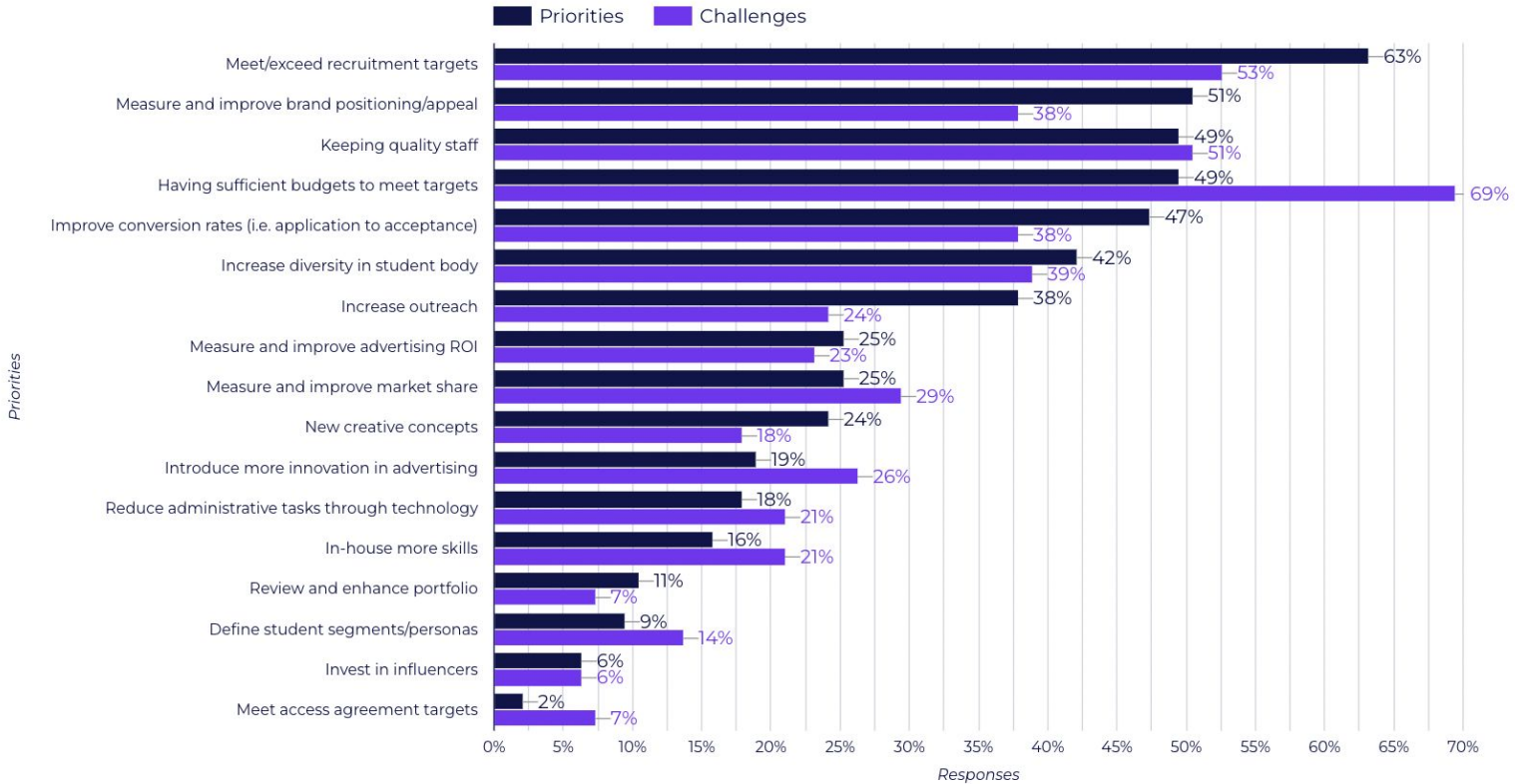
**When looking at market growth the main focus is on existing domestic markets domestic. However new programs (52%) and new domestic markets (45%) are also important.**

**The main challenges for US HE marketers are centred around having sufficient budgets to hit recruitment targets (69%), as well as managing their brand and improving conversion**



Key Findings  
**Priorities and Growth**

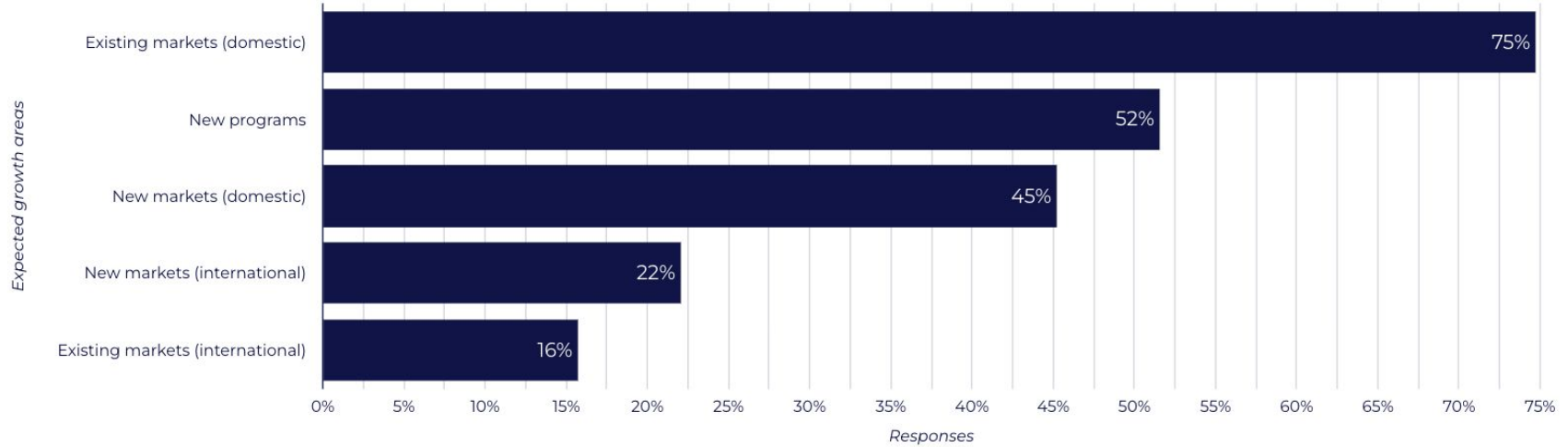
# Priorities and Challenges (US)



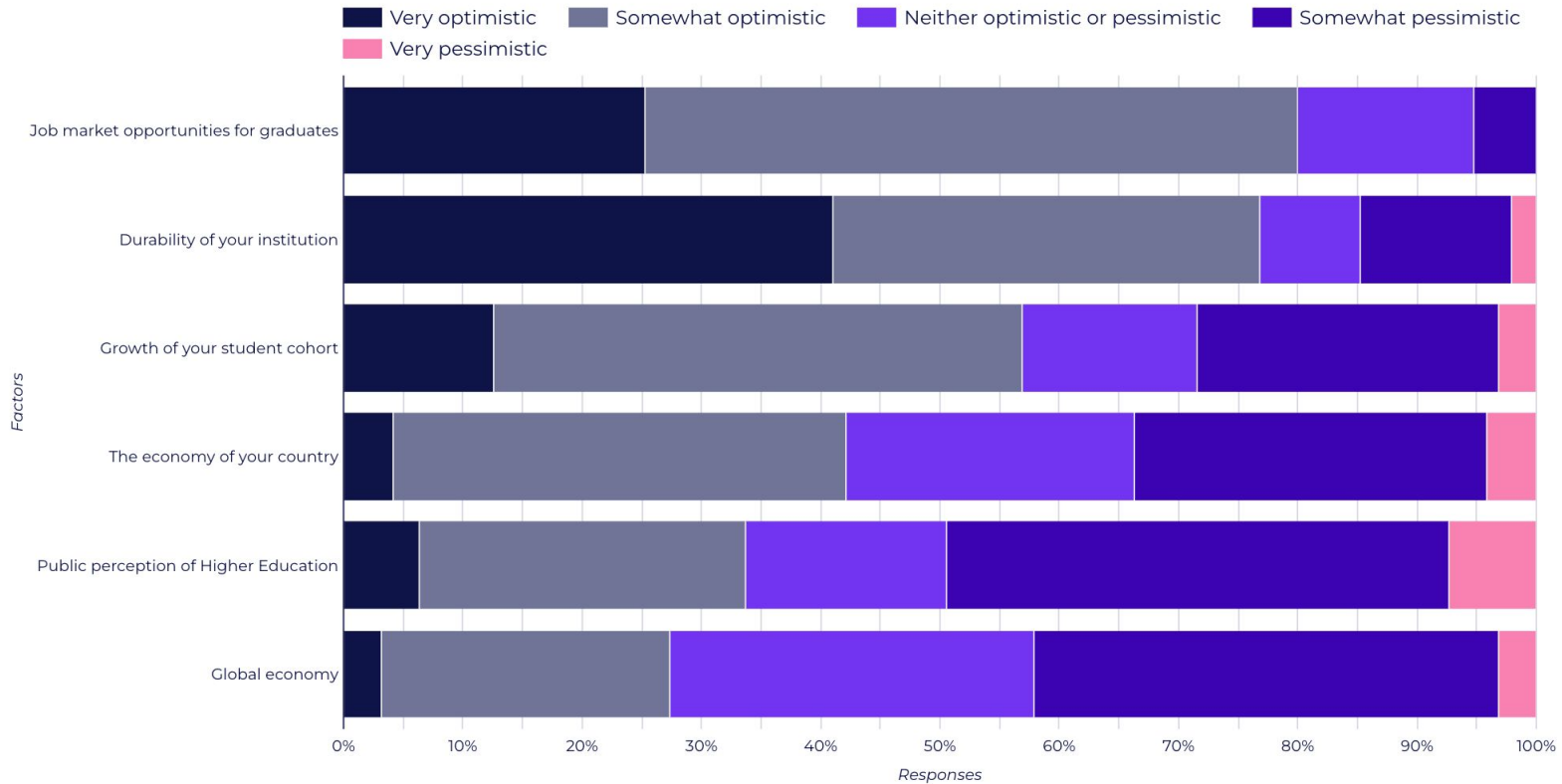


# Focus and Growth

## Expected areas of growth



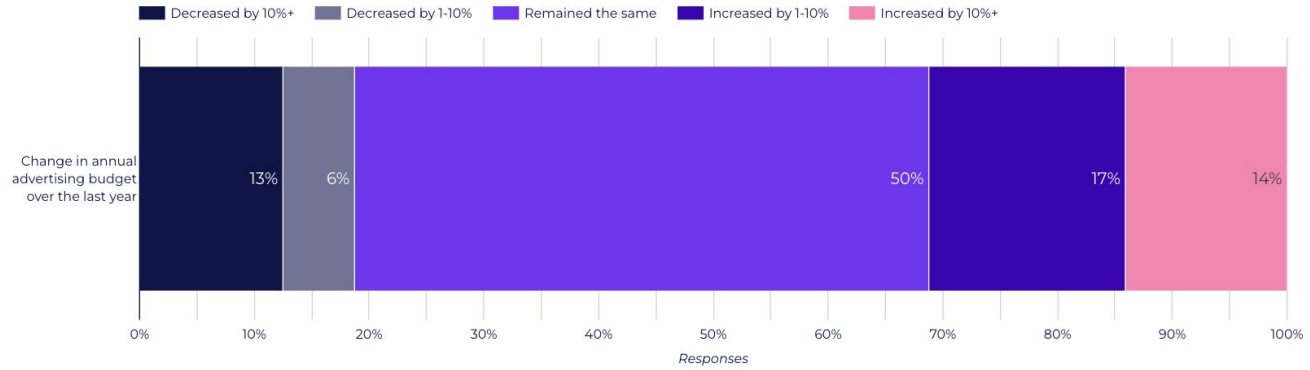
# Institutional Optimism



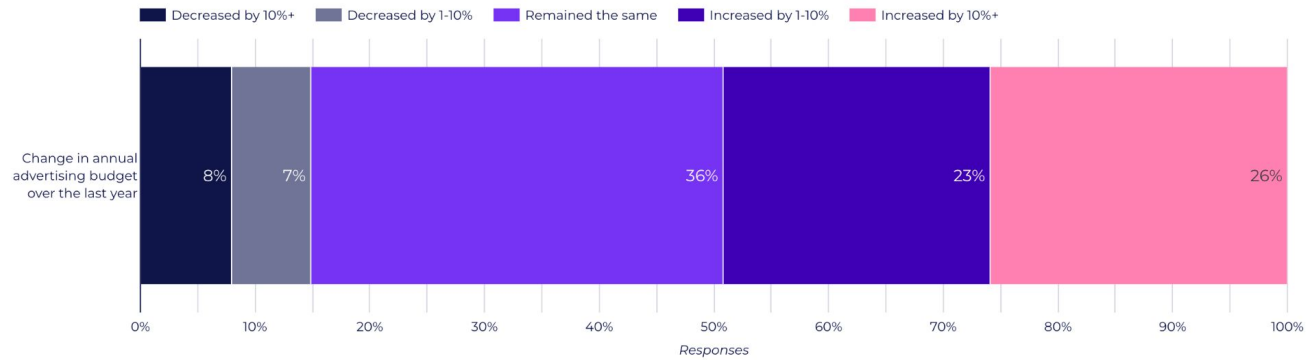
# Key Findings **Budgets**

# Budgets

US

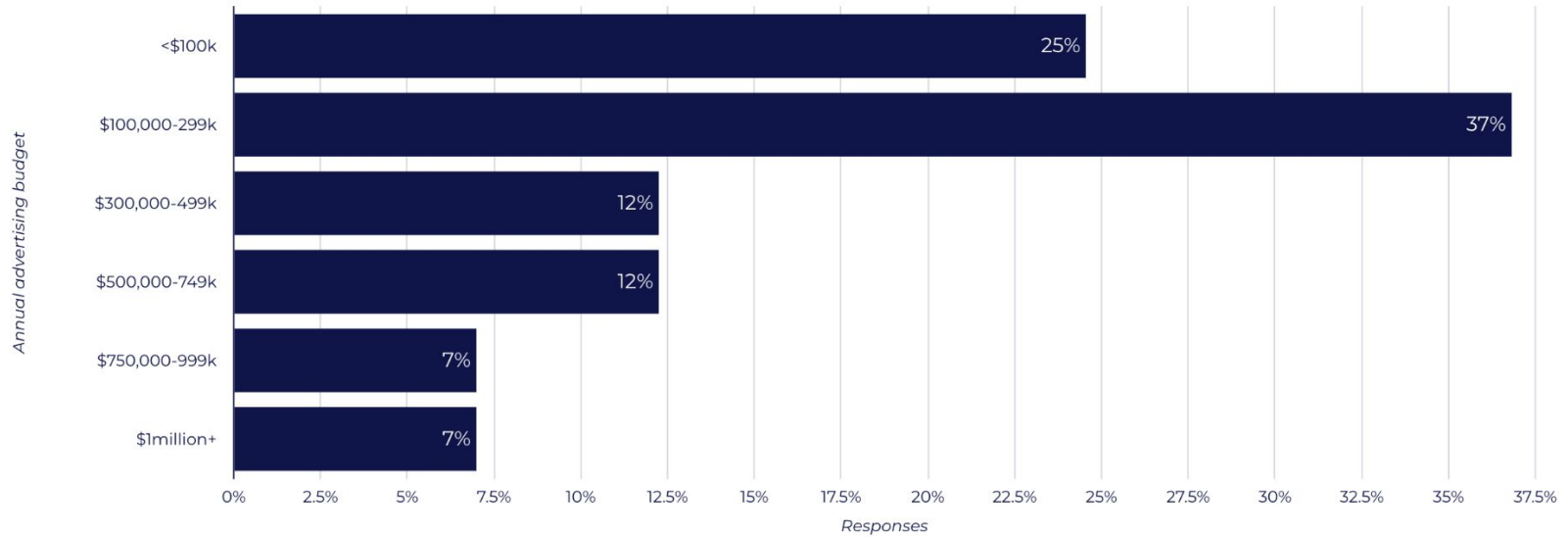


ROW



# Budgets

## Annual budgets for advertising

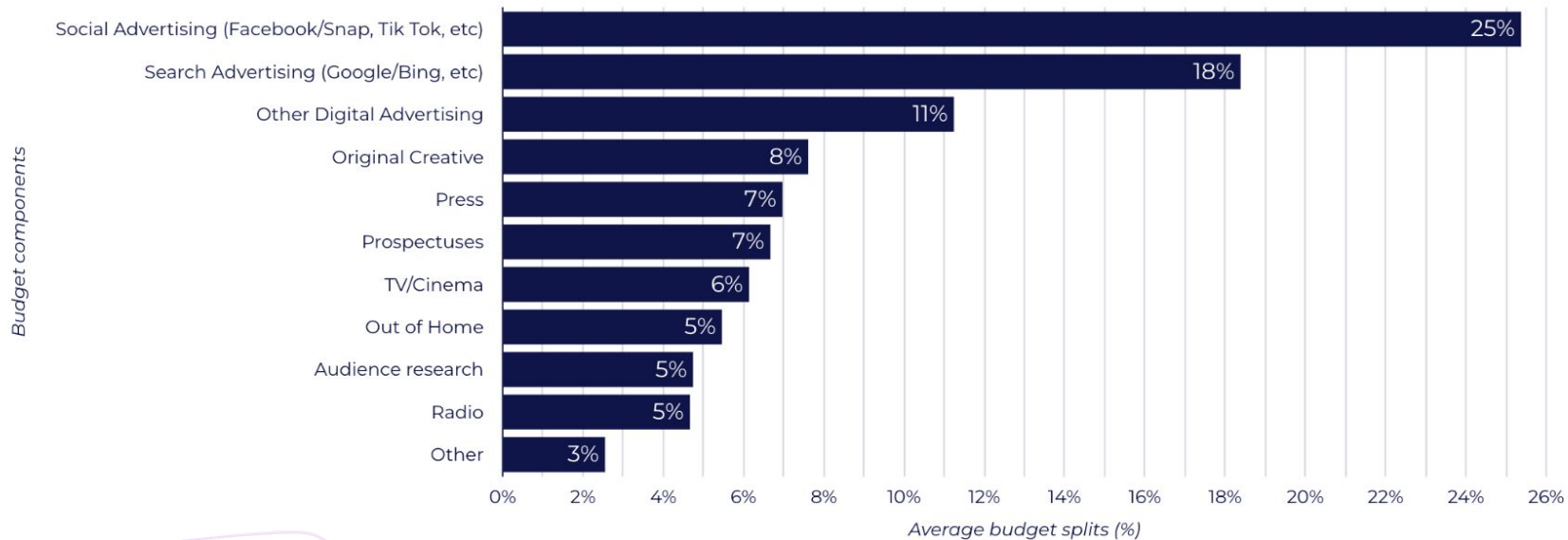


Responses where the annual advertising budget was 'Unknown' have been removed.

# Budgets

On average **55.04%** of budget is spent on digital advertising. *(This includes social, search and other digital)*

## Average budget splits



Key Findings

# Data and Technology

# Metrics & Measurement

## Top five areas US institutions track and use:

1. Applications
2. Enrollments
3. Leads/enquiries
4. Clicks/Impressions
5. CTR (Click Through Rate)

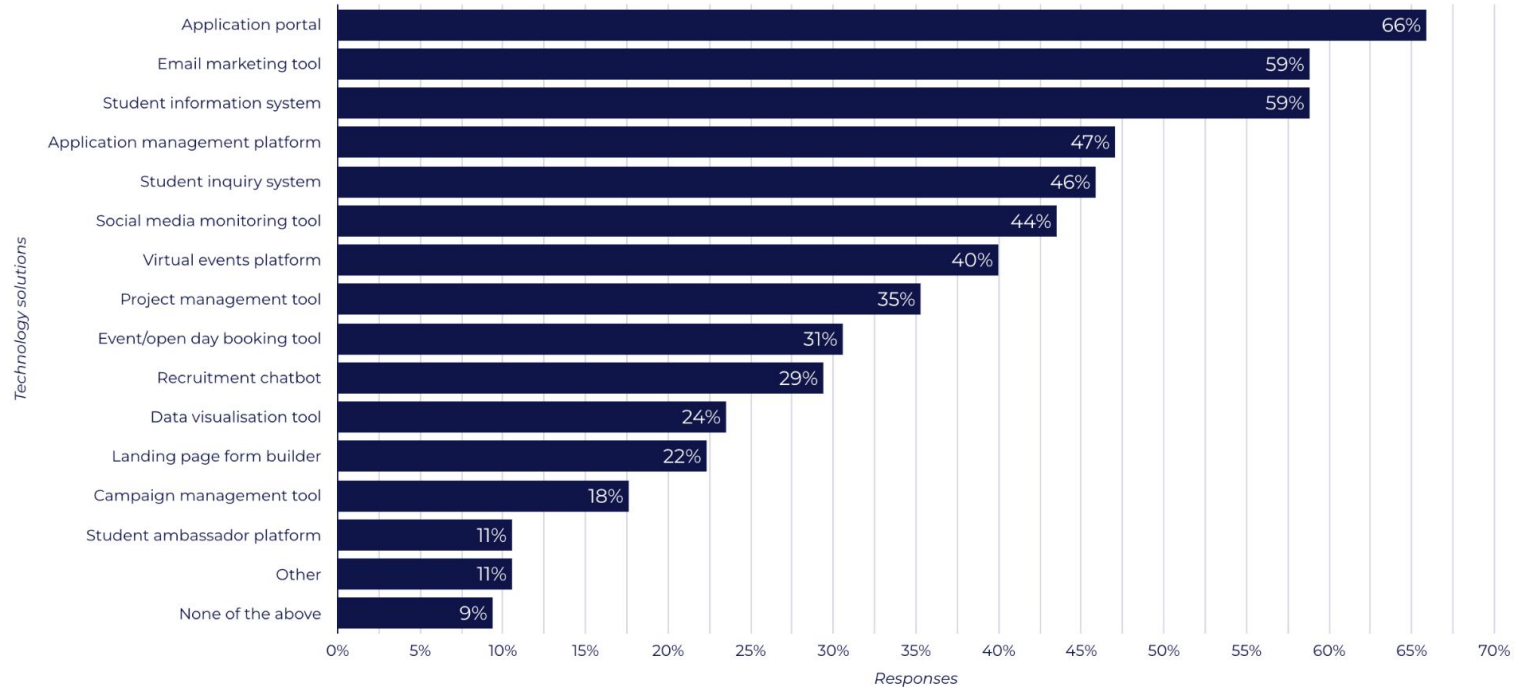
## Top five areas US institutions want to track, but currently can't:

1. Market share
2. Lead time (i.e. time from lead to enrolled student)
3. Performance against competitors
4. Cost per application
5. Cost per enrollment



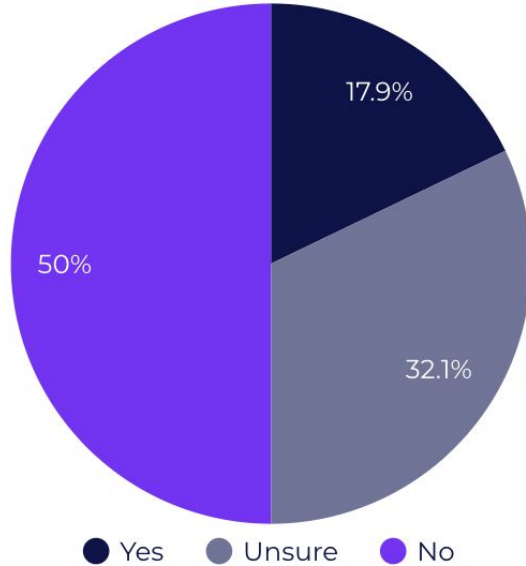
# Tools

## Technology solutions used by institutions

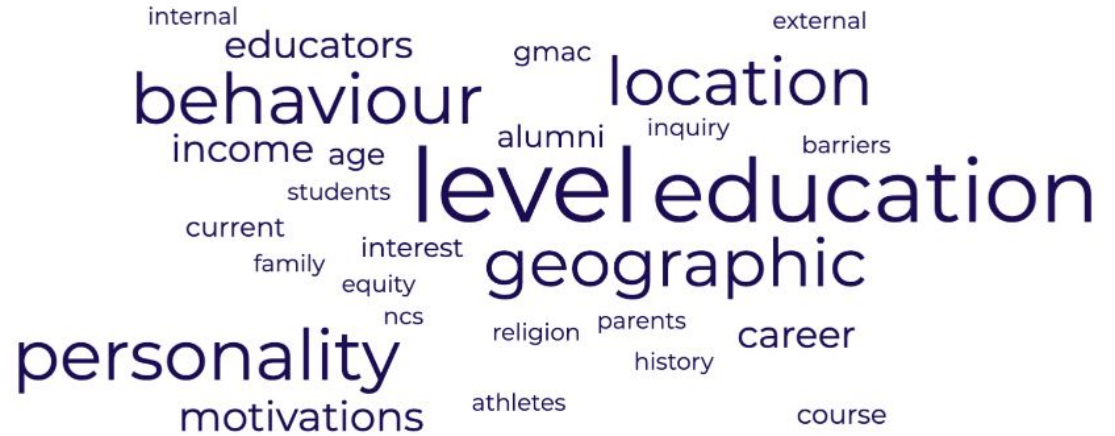


# Segments and Personas

Are segments/personas used?



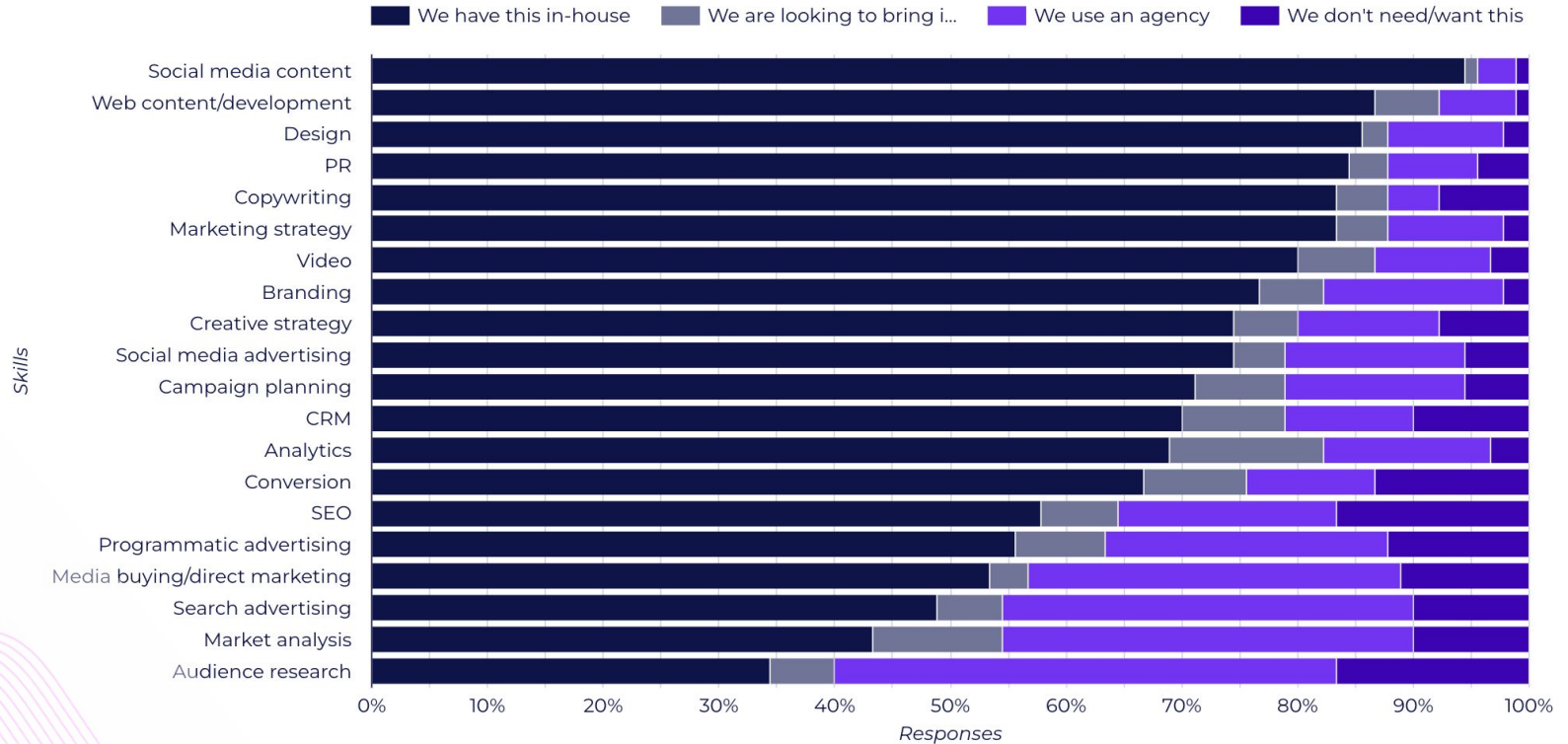
Types of segments/personas used





Key Findings  
**In House Skills**

# Skills present within marketing teams



Key Findings

# Student Engagement

# What matters to students?

Factors	Student Pulse Rank	HEMS Rank	Difference in Rank	
Knowing others who attend/have attended the university	18	7	11	
Study abroad options	16	11	5	
Good Covid-19 response	13	10	3	
The institution's culture suits my personality	9	6	3	
Small class sizes	10	9	1	
Campus facilities and support services	4	3	1	
Accommodation	8	8	0	
Entry requirements	5	5	0	
Costs/affordability	2	2	0	
Offers the right course	1	1	0	
Good rankings/reputation/reviews	3	4	-1	
Far away from home	17	18	-1	
Societies/clubs	14	15	-1	
Close to home	12	13	-1	
Unconditional offers	15	17	-2	
Flexible hours	11	14	-3	
Online learning quality	7	12	-5	
1-1 tutor time	6	16	-10	

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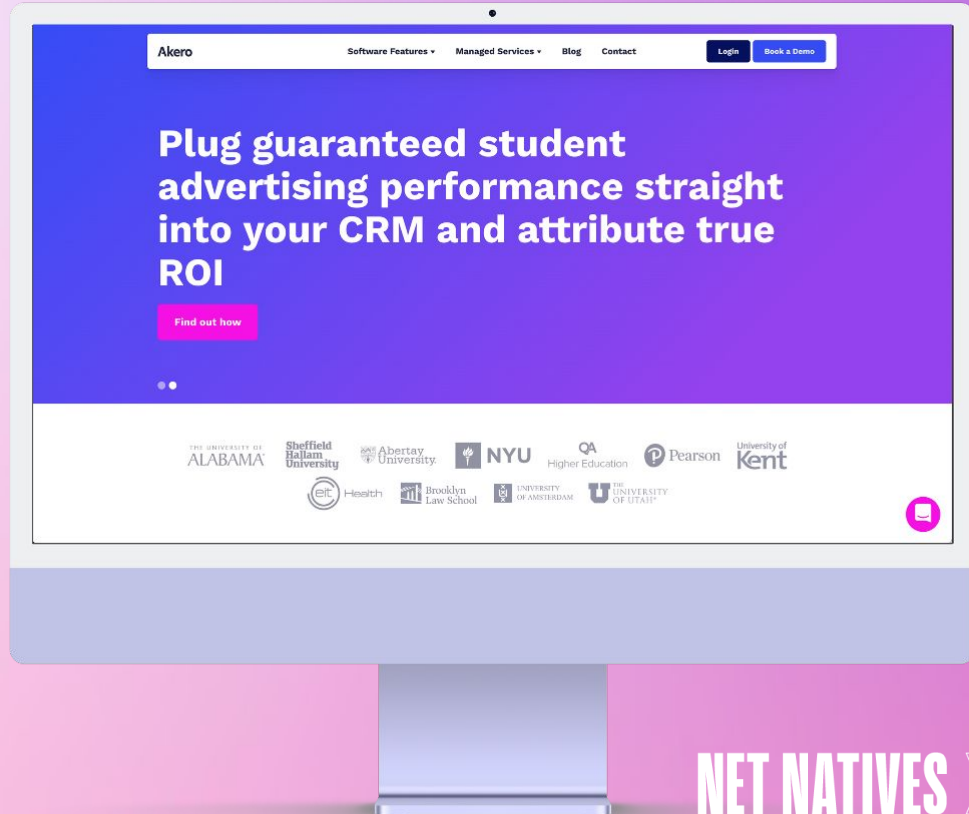
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# Next Steps

## Next steps



Contact us to access this data, and more, through Akero





# Thank You!

## Next Steps:



Talk to us about  
participating in focus groups



Get in touch with us:  
[marketing@netnatives.com](mailto:marketing@netnatives.com)

# Questions