

THE HIGHER EDUCATION MARKETING SURVEY

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Welcome



CATALINA POWELL
Times Higher Education
Operations Director, Student



MEGAN HERDSON
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Senior Marketing Manager



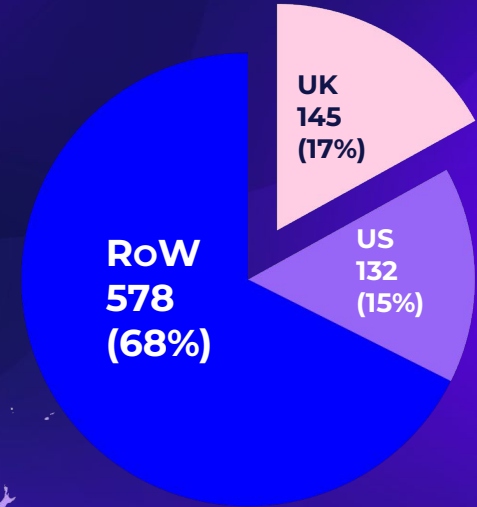
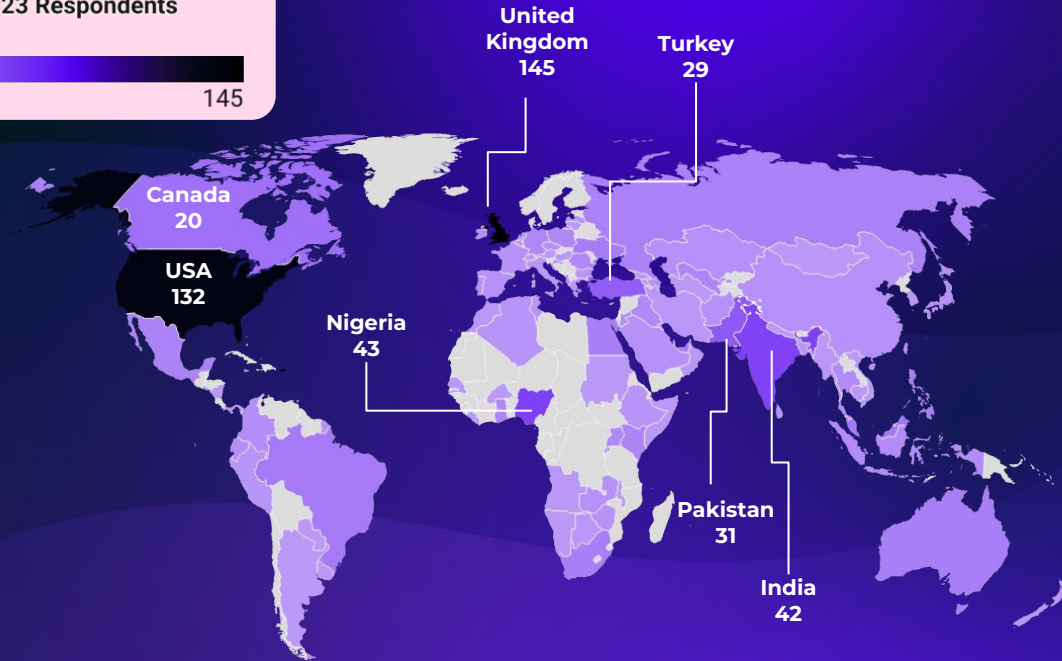
HOLLY HANSTOCK
Net Natives
Senior Researcher

Global and UK sample Overview

HEMS 2023 Respondents: Global

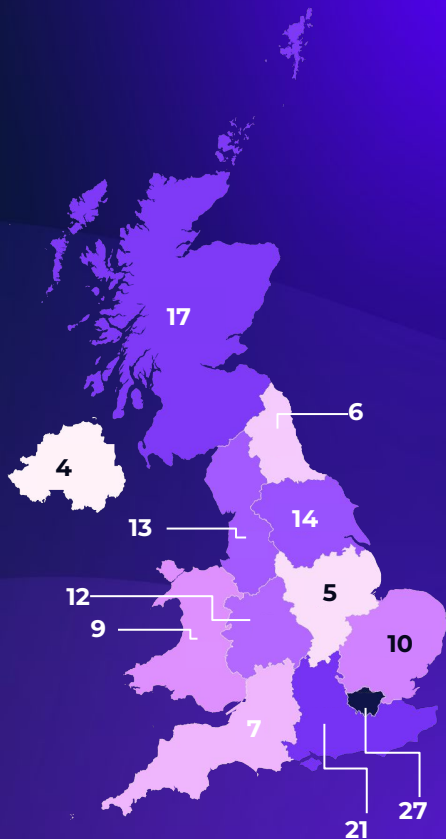


HEMS 2023 Respondents
Location



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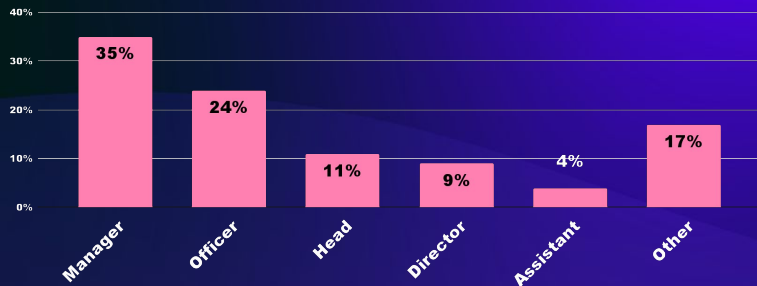
HEMS 2023 Respondents: UK



HEMS 2023 Respondents: UK



Level of role



Average size of department



40 people

Compared to

28 people

in the rest of the world

Academic staff 21% VS Professional services 79%

Scope of recruitment



40%
Domestic and international

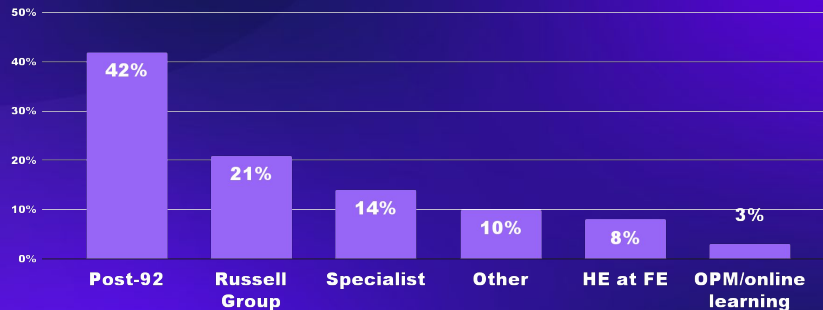


34%
Domestic



10%
International

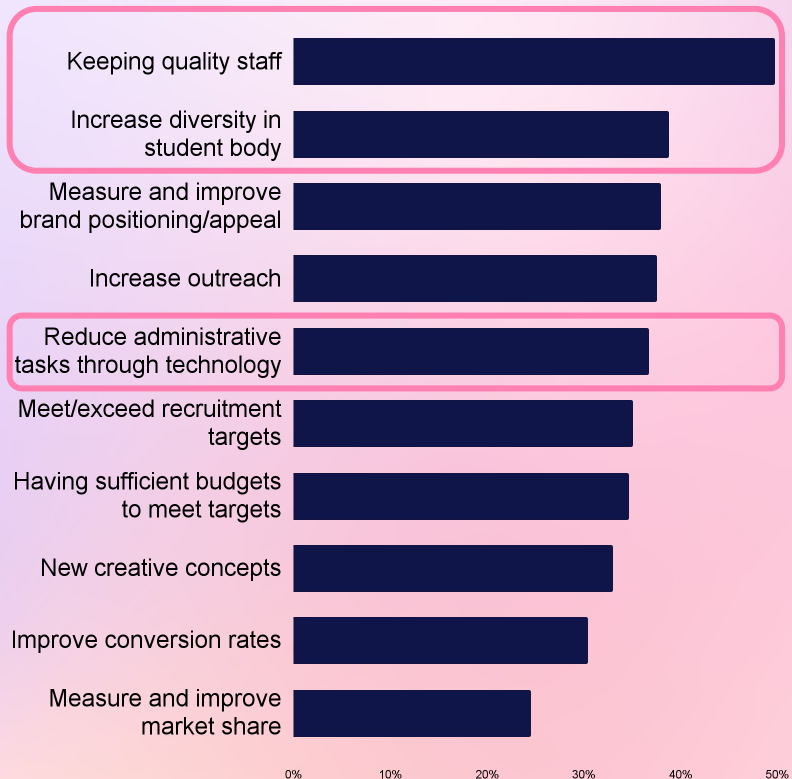
Type of institution



HEMS 2023 Global overview

Global 2023: Priorities & Challenges

Priorities

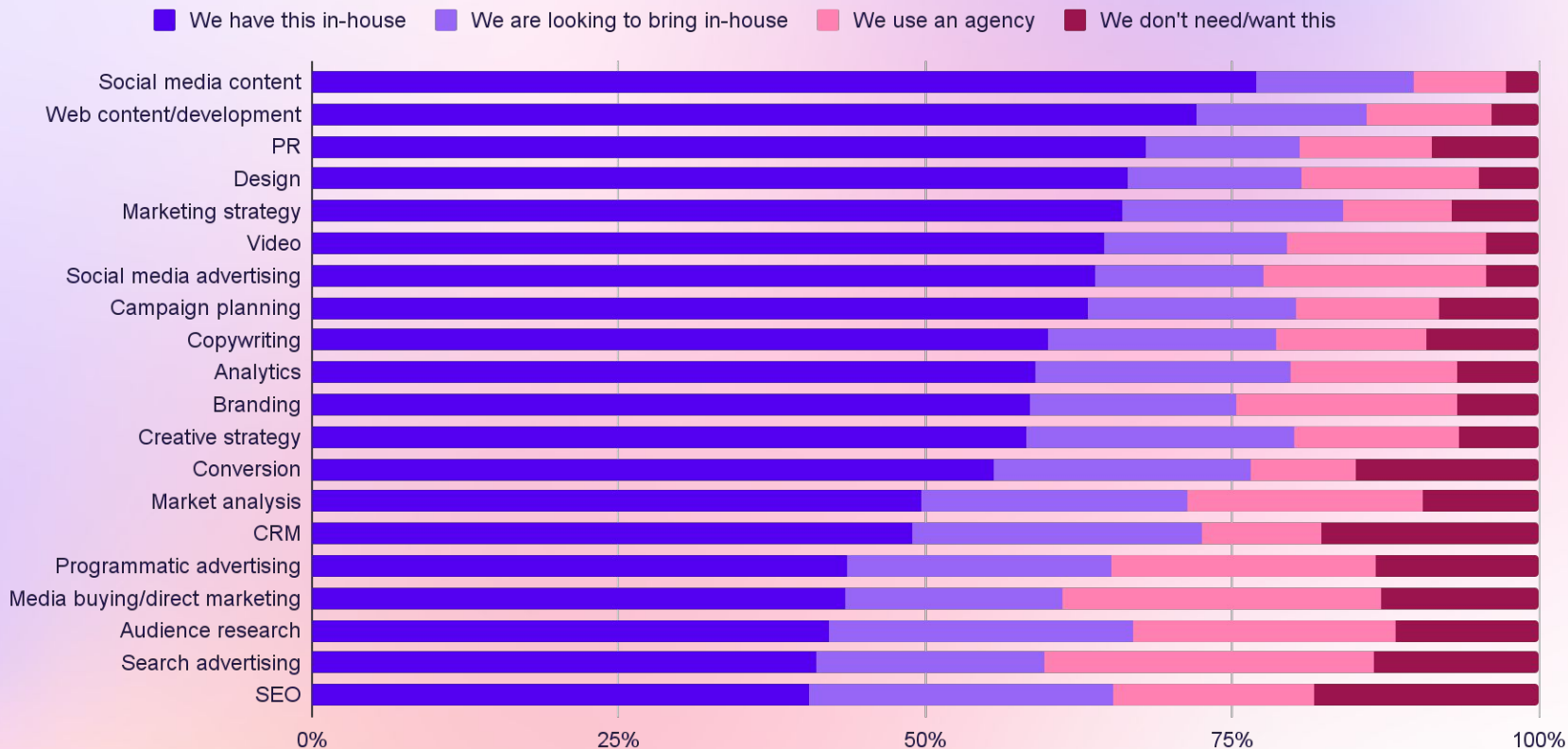


Challenges



*Q. Of these factors, which would you describe as your top five priorities?
Q. Of these factors, which would you describe as your top five challenges?*

Global 2023: Keeping quality staff

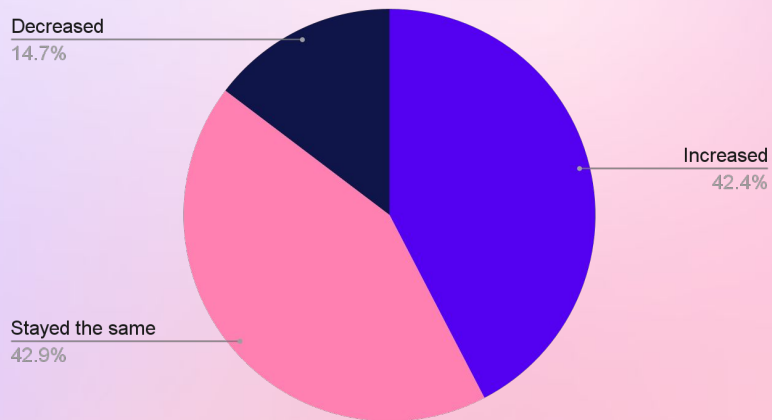


Q. Which of the following skills do you have within your team?

Global 2023: Keeping quality staff



Team size



Q. In the last year, has the number of people in your team...

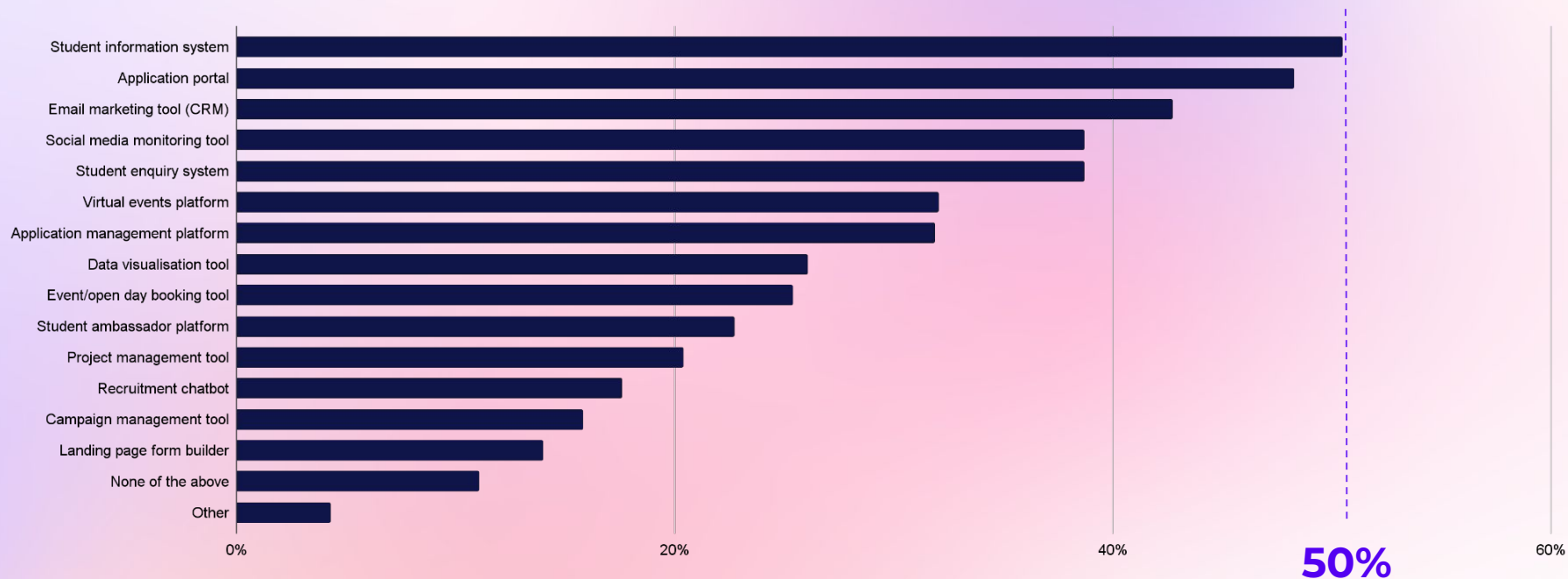


Barriers to in-housing

1. **Cost to hire specialist staff** 65%
2. **Availability of staff** 35%
3. **Unable to attract specialist staff** 31%
4. **No buy-in from leadership** 25%
5. **Technology** 21%

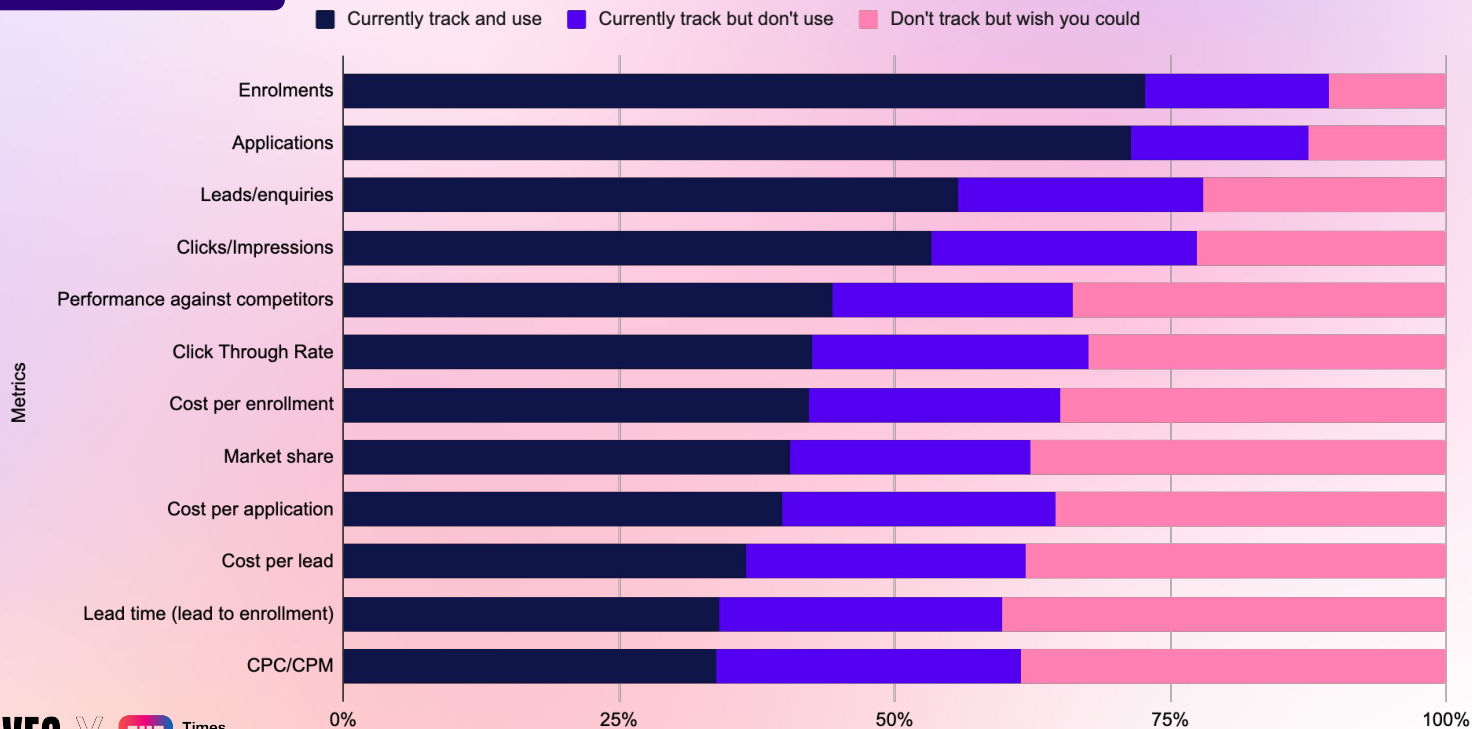
Q. What, if anything, would prevent you from bringing skills in-house?

Global 2023: Reduce administration through technology



Global 2023: Reduce administration through technology

Q. Which of these metrics do you...



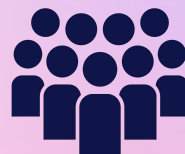
Global 2023: Increasing diversity in the student body



Strategies to increase diversity

1. **Additional scholarships** **67%**
2. **Additional support structures for underrepresented students** **60%**
3. **Increased flexibility in program delivery** **42%**
4. **Adjusting entry requirements** **39%**

Q. Which, if any, of the following strategies have you considered or implemented to increase student diversity?



Target groups for recruitment

1. **Hispanic/Latino** **69%**
2. **African American** **64%**
3. **American Indian/Alaska Native** **54%**
4. **Two or more races** **45%**
5. **Asian** **37%**

Q. Which populations are you looking to increase within your student body? [US only]

HEMS 2023 UK overview

UK 2023 VS Global 2023: Top 5 Priorities & Challenges



Priorities

UK institutions

Improve conversion rates (application to acceptance) 54%

Meet/exceed recruitment targets 54%

Increase diversity in student body 44%

Measure and improve brand positioning/appeal 41%

Measure and improve market share 38%

RoW institutions

Keeping quality staff 52%

Increase outreach 40%

Reduce administrative tasks through technology 40%

Increase diversity in student body 38%

Measure and improve brand positioning/appeal 37%



Challenges

Keeping quality staff 50%

Having sufficient budgets to meet targets 46%

Measure and improve brand positioning/appeal 39%

Meet/exceed recruitment targets 39%

Improve conversion rates (i.e. application to acceptance) 37%

Keeping quality staff 49%

Having sufficient budgets to meet targets 48%

Reduce administrative tasks through technology 35%

Increase outreach 34%

Meet/exceed recruitment targets 33%

Key Themes



Improving conversion rates is a key priority with potential for greater use of metrics



Recruitment targets are a focus, particularly for international, although with a need to consider diversity



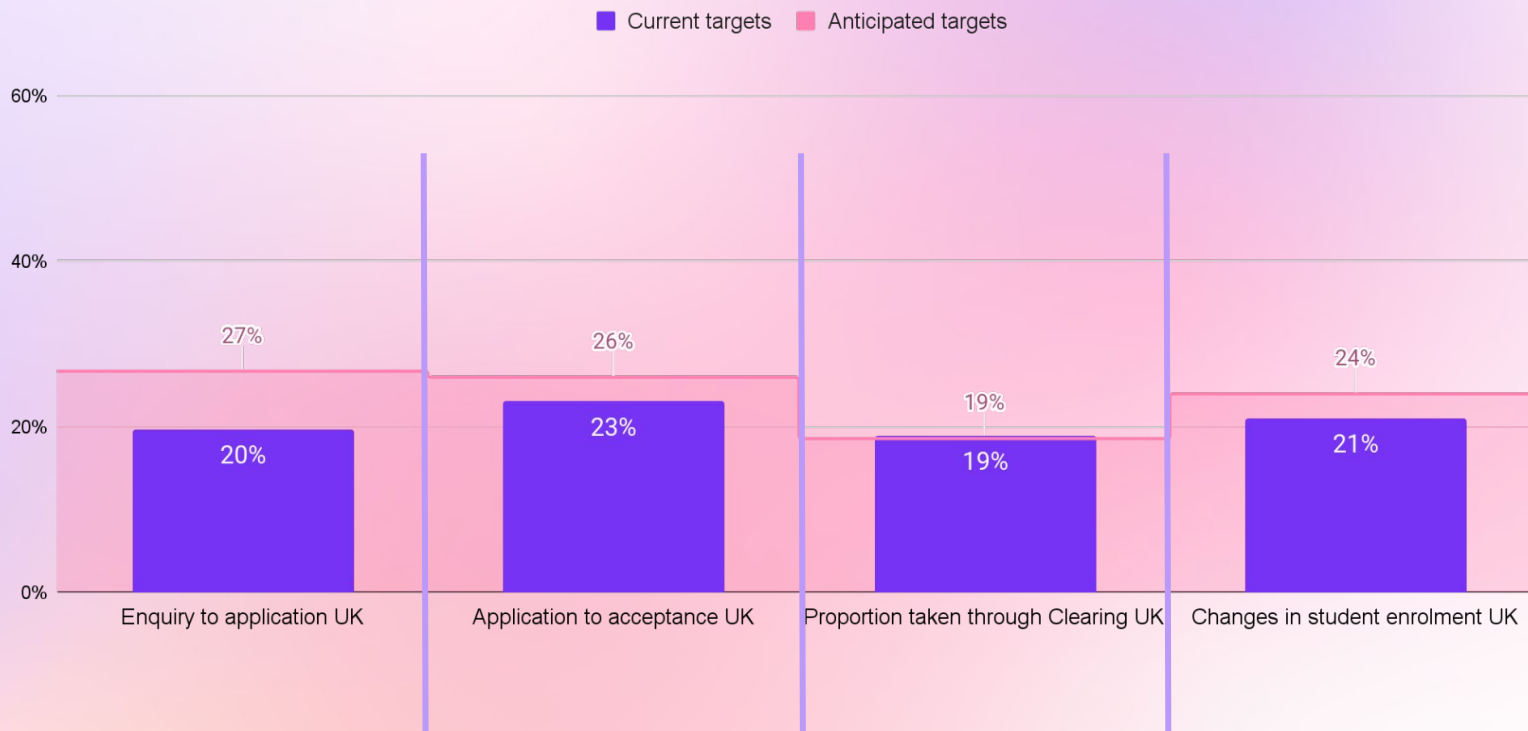
Improving brand positioning is a consideration with a large proportion of budgets currently spent on digital

UK

Improve conversion rates

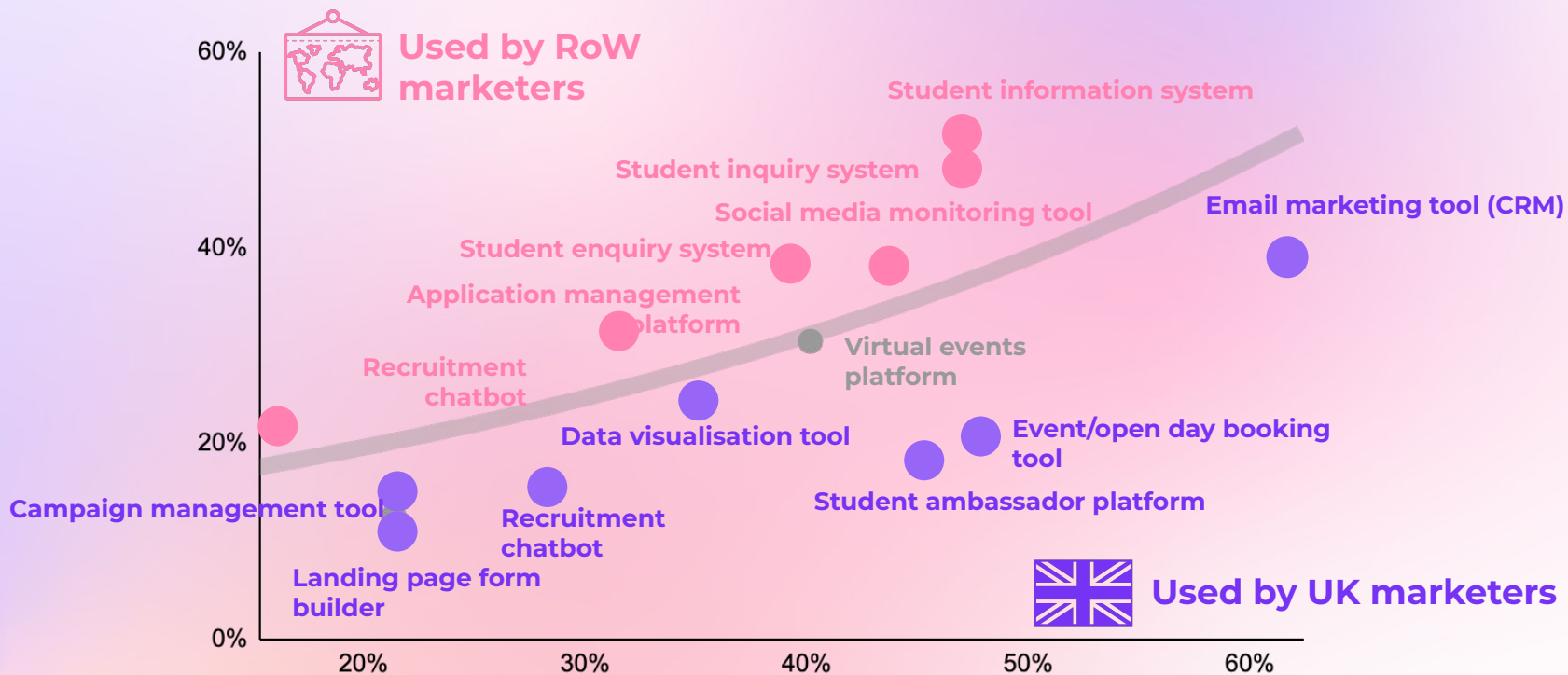
UK 2023: Improve conversion rates

Conversion rates and targets expected to grow



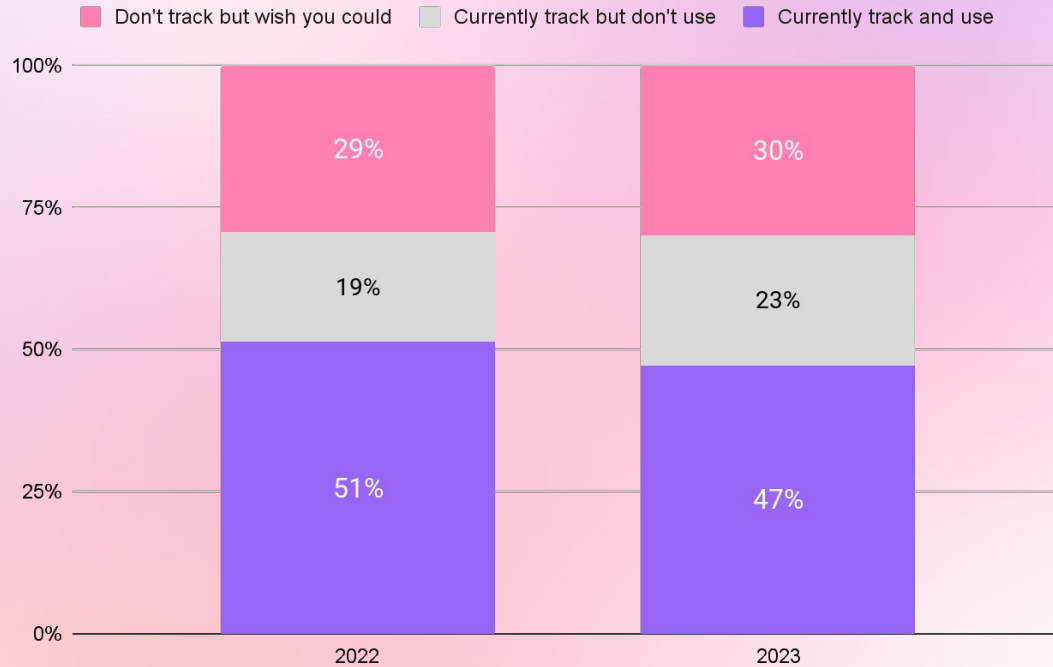
UK 2023 VS Global 2023: Improve conversion rates

UK marketers love CRM and email marketing



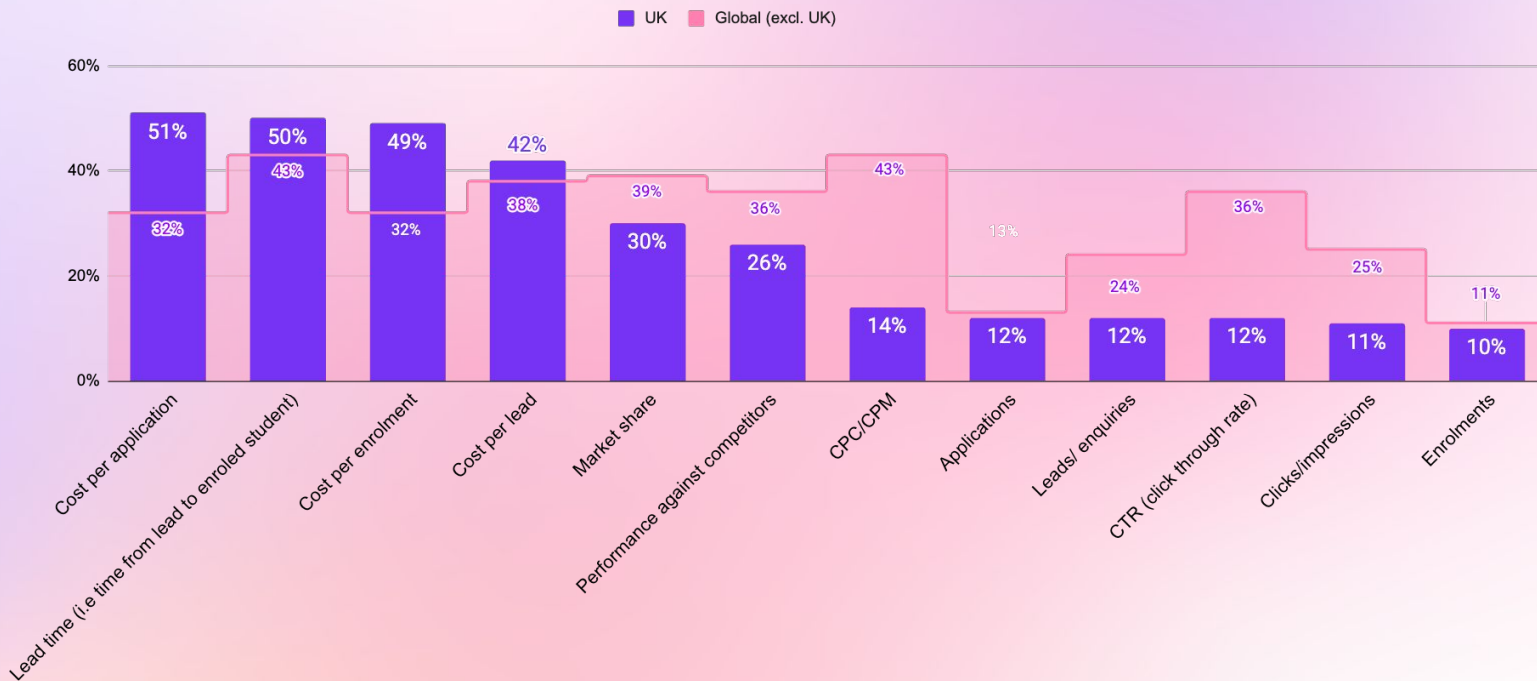
Global 2023 vs 2022: Improve conversion rates - Metrics used

There is room for growth in metrics, which could be tracked



UK 2023 vs Global 2023: Improve conversion rates

UK is more focussed on cost per application and enrolment

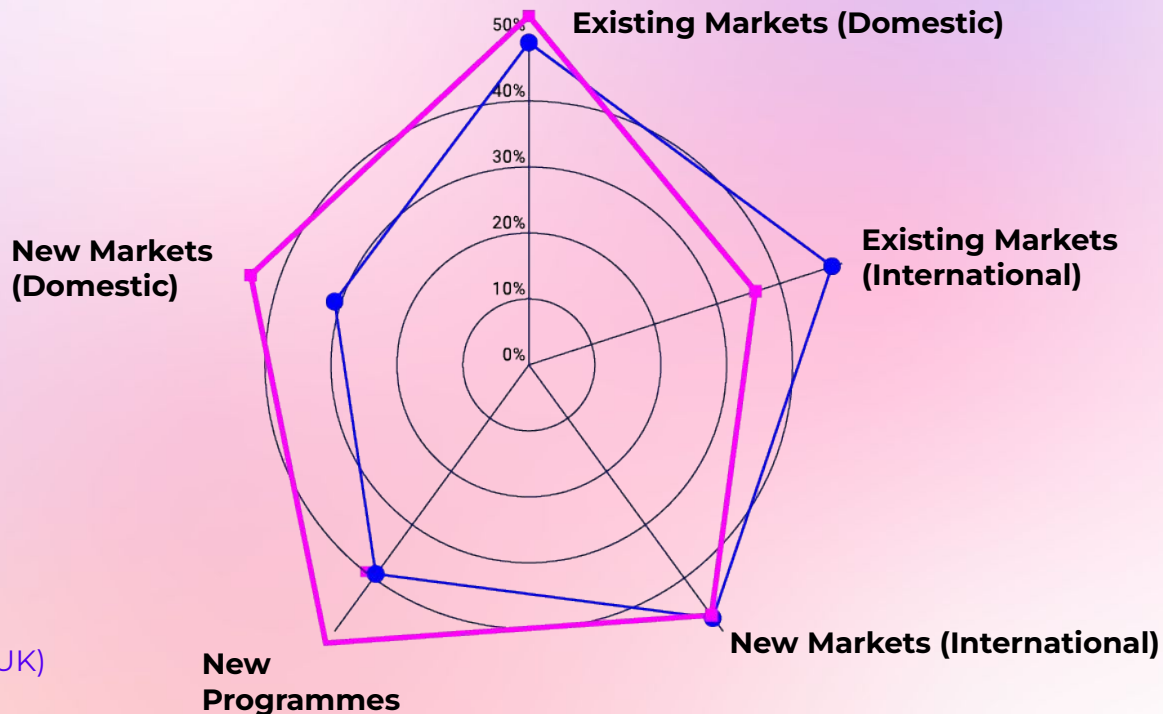


UK

Meet/Exceed Recruitment Targets

UK 2023 VS Global 2023: Recruitment targets

UK mainly reliant on existing markets for growth



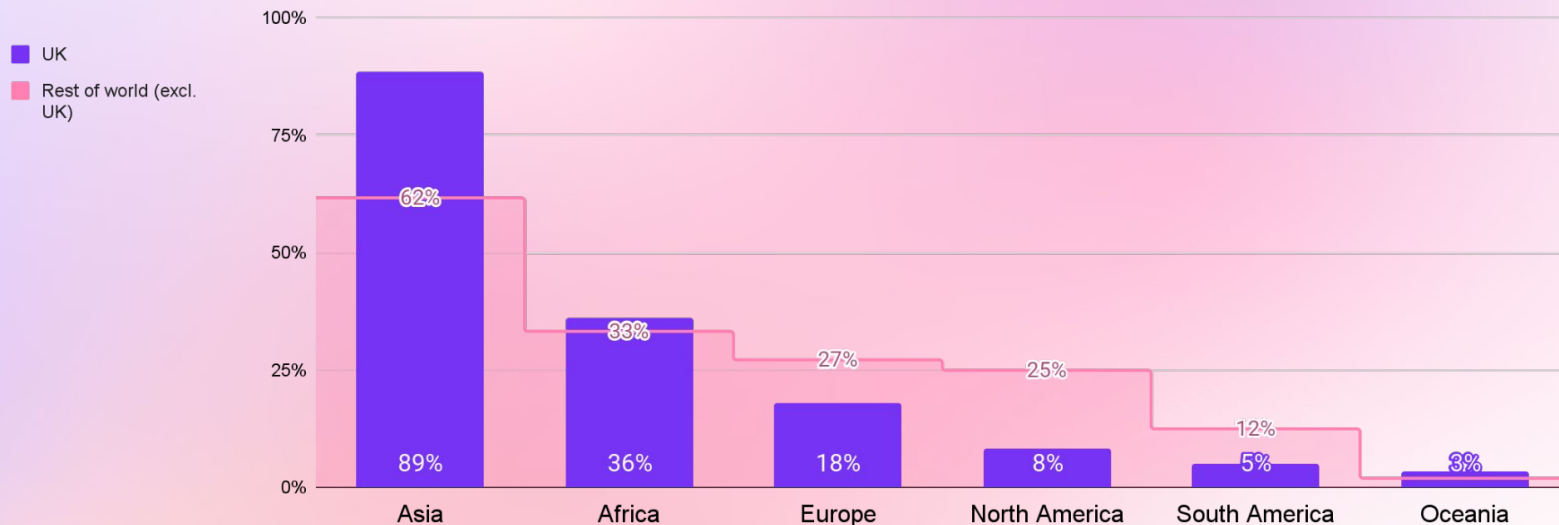
— UK

— Rest of World (Excl. UK)

Q. Where do you expect growth to come from in the next 12 months?

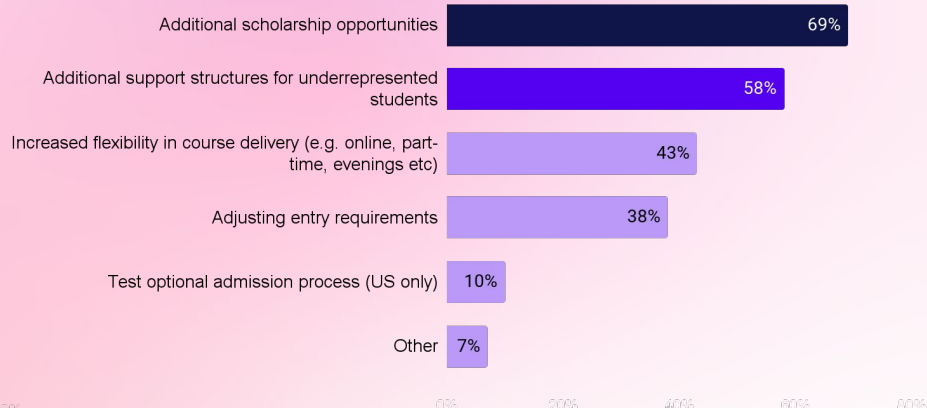
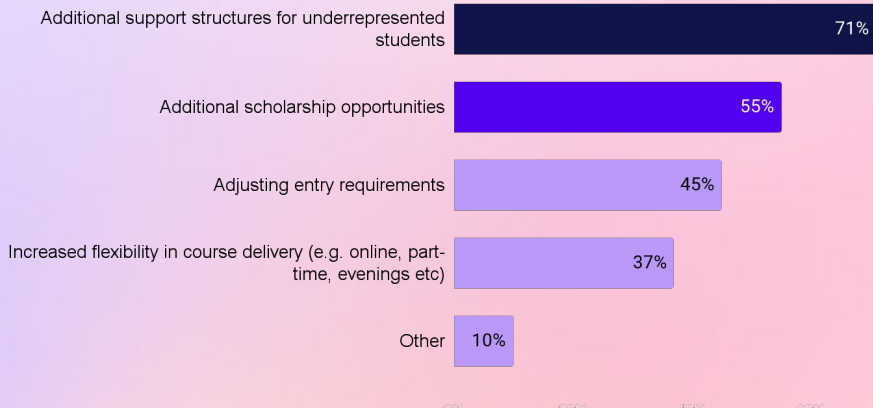
UK 2023 VS Global 2023: Recruitment targets

Reliance on Asia greater for the UK than RoW



UK vs Global 2023: Recruitment targets - Increase diversity in student body

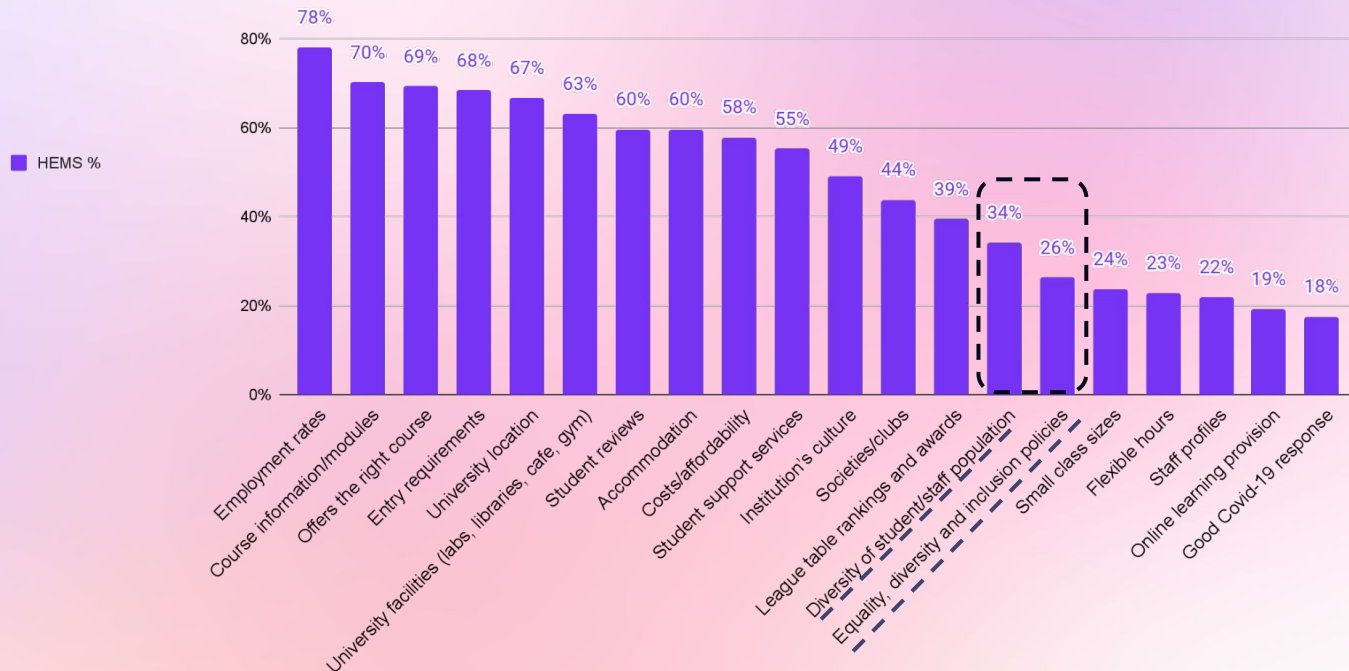
Additional support structures are the most considered strategy in the UK, compared to scholarships globally



**This question was not asked in the 2022 Survey*

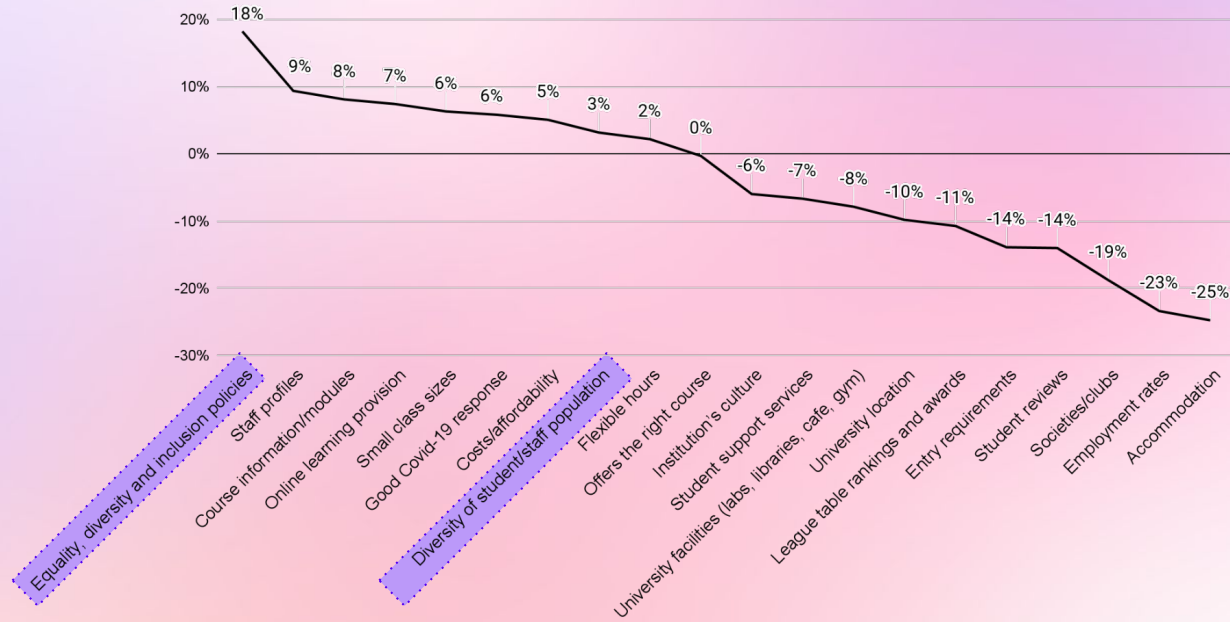
UK 2023: Recruitment targets - student engagement

Marketers do not think diversity of the student body is important to students when choosing a university



UK 2023: Recruitment targets - student engagement

While students do value equality, diversity and inclusion

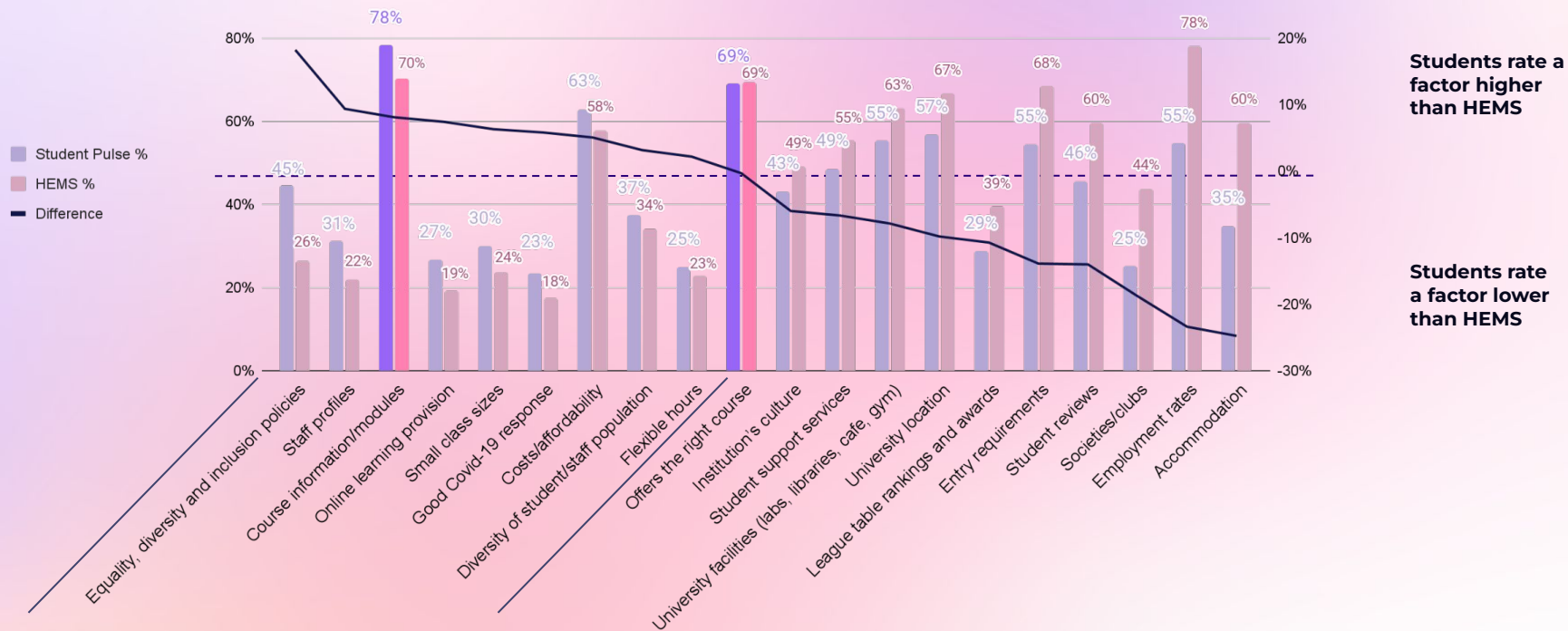


Students rate a factor higher than HEMS

Students rate a factor lower than HEMS

UK 2023: Recruitment targets - student engagement

Equality and diversity has the greatest difference, but Marketers were correct in the importance of course for students



UK

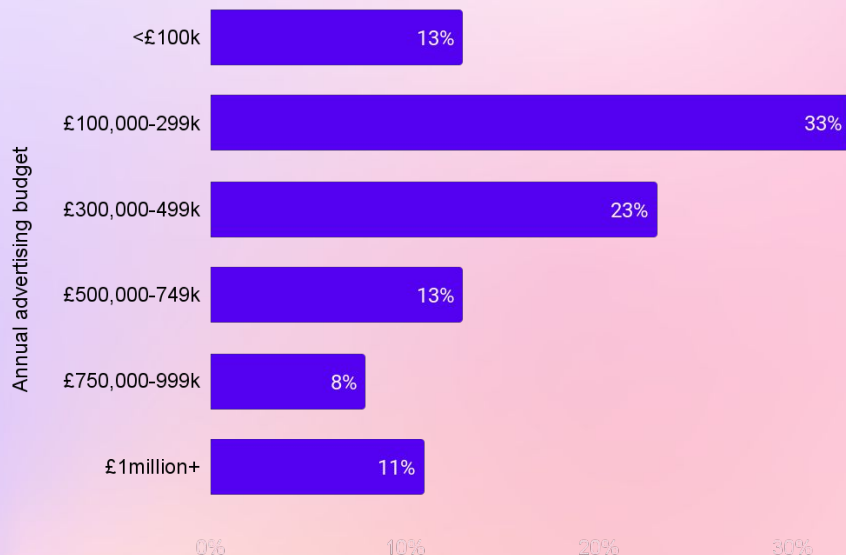
Measure and improve brand
positioning/ appeal

UK 2023: Brand positioning/ appeal - having sufficient budgets

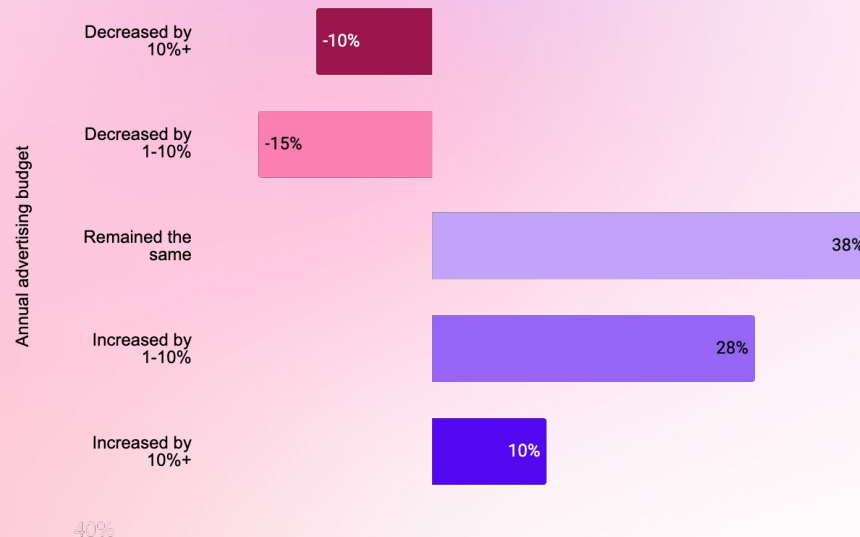
Variation in budgets across the sector



Annual advertising budgets



Year on year budget change

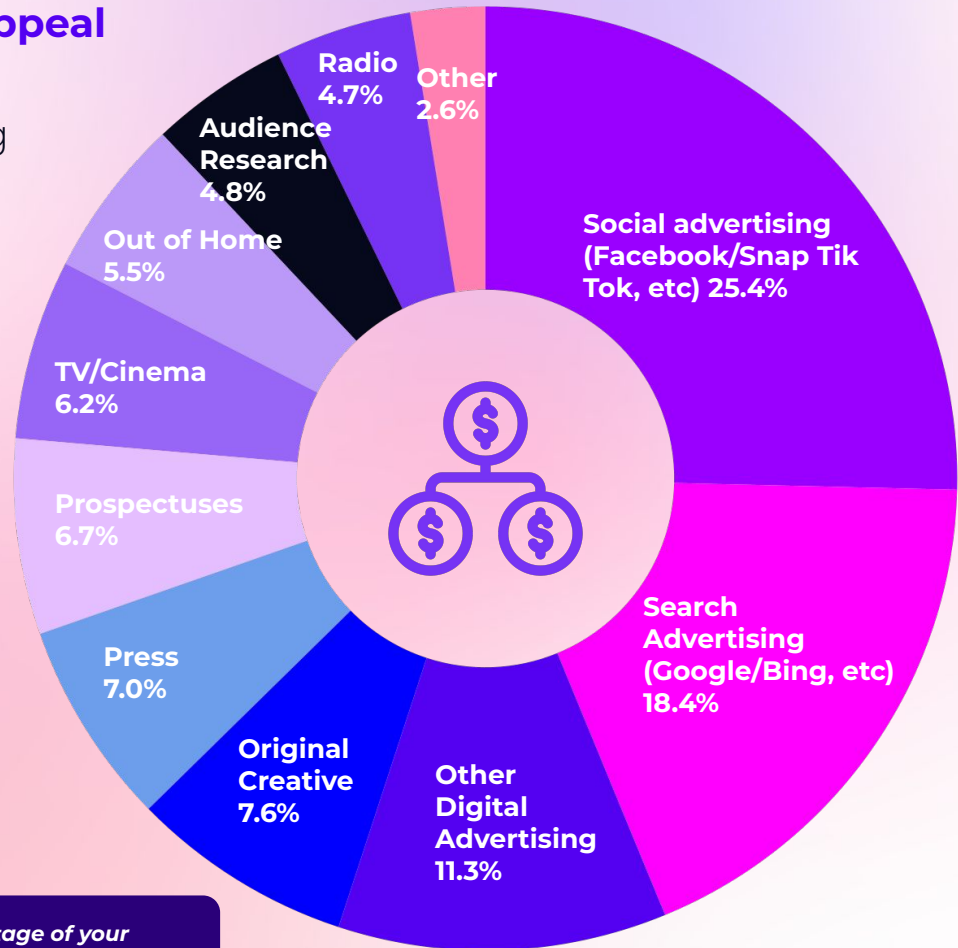


Global 2023: Brand positioning/ appeal - Having sufficient budgets

Majority spent on digital advertising

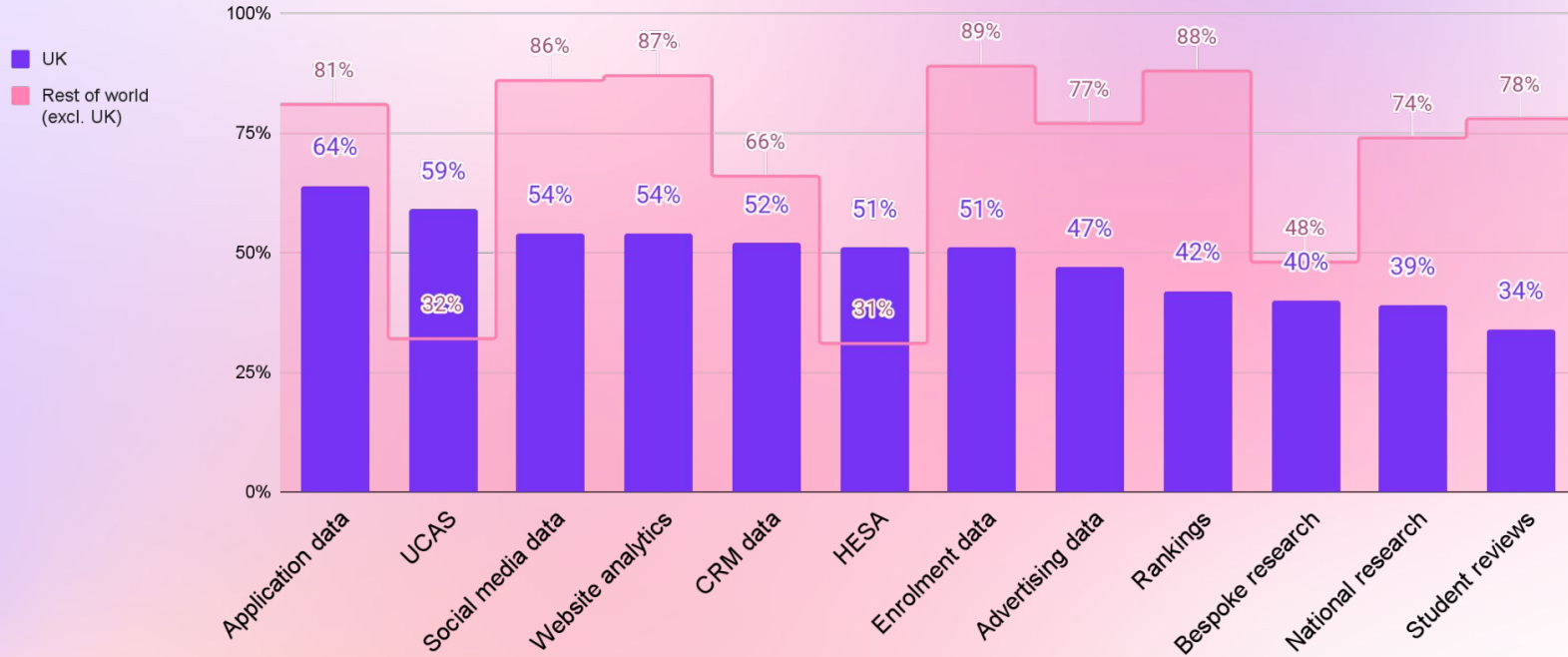
+55%

University marketing teams are spending over 55% of their marketing budget on digital tactics



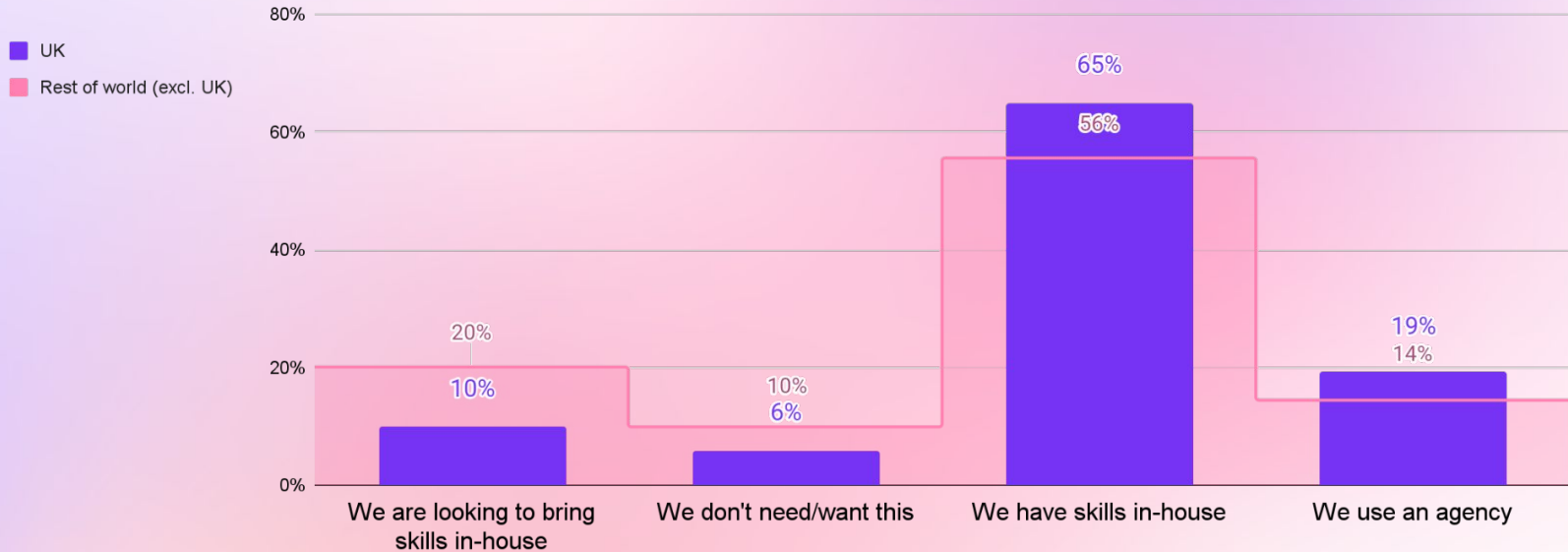
UK 2023 VS Global 2023: Brand positioning/ appeal

UK focused on applications



UK 2023 VS Global 2023: Brand positioning and appeal

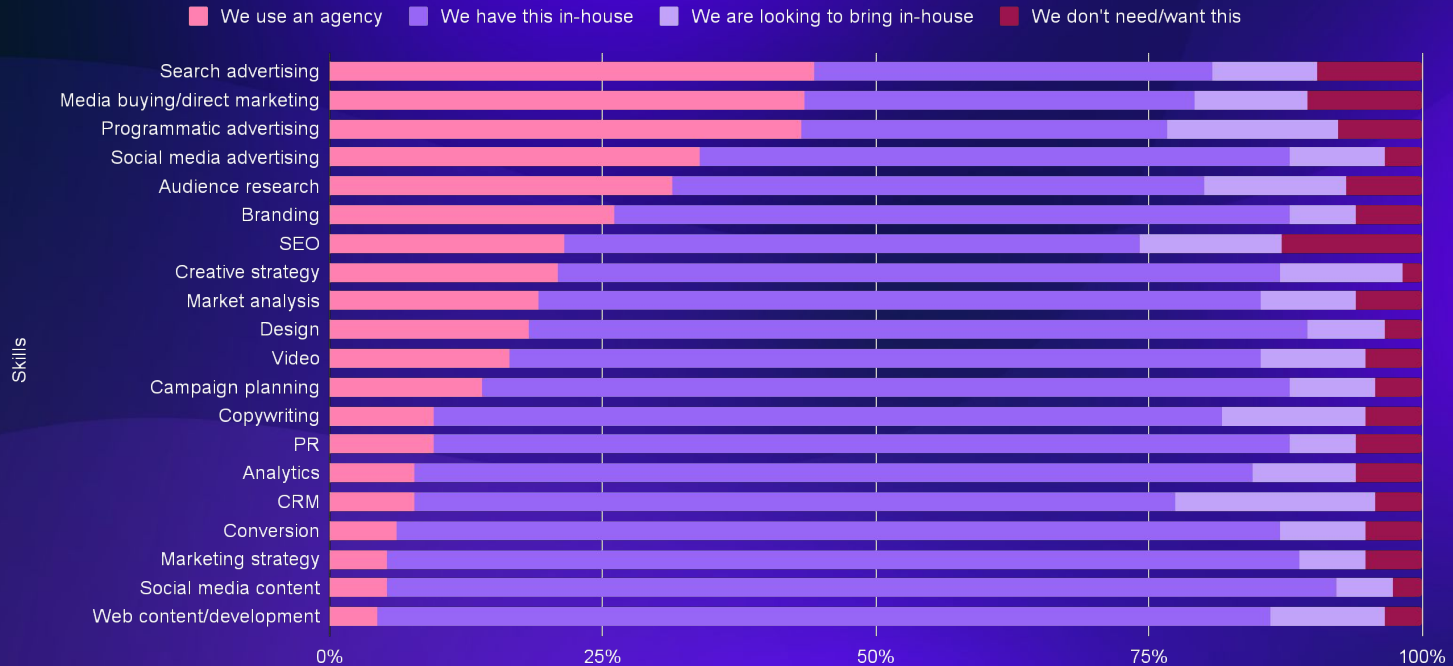
UK marketing teams more likely to use agencies



UK 2023: Brand positioning/ appeal

UK marketing teams more likely to use agencies for search advertising, media buying and programmatic

Q. Which of the following skills do you have within your team?



Summary

Key Themes



Improving conversion rates is a key priority with potential for greater use of metrics



Recruitment targets are a focus, particularly for international, although with a need to consider diversity



Improving brand positioning is a consideration with a large proportion of budgets currently spent on digital

Key Themes



Improving conversion rates is a key priority with potential for greater use of metrics



- Invest time and money
- Tools



Recruitment targets are a focus, particularly for international, although with a need to consider diversity



- Research
- Balance
- Messaging



Improving brand positioning is a consideration with a large proportion of budgets currently spent on digital



- Benchmarking
- Spread budget
- Your people

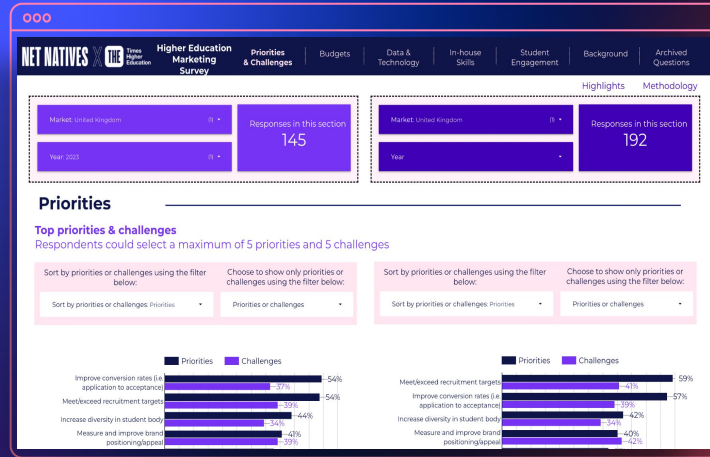
Questions for you?

1. What's the **one thing** you'll take away from this?
2. What would you like to see covered in **HEMS 2024**?
3. Your question

Find out more...

→ **Higher Education Marketing Survey (HEMS) interactive dashboards** are available to you completely free of charge

If you do not already have a login for Akero please contact megan.herdson@netnatives.com and we can set up access for you.



Thank you
research@netnatives.co.uk

Student Pulse: Additional information

Pulse is a monthly survey sent out to our Student Hut panel

Purpose

- Understand and track what matters most to students when making educational choices.
- Compare the findings to the reality of their experiences.
- Understand what students look for in terms of support for their well-being.

Structure

- Student Pulse is split into 3 key sections; decision-making, well-being and media.
- From this, we can provide insights for universities on how to communicate, support and satisfy current and prospective students.

Respondents

- The survey is sent to school, college and UG students based in the UK. We aim for 700-750 responses each month. The questions asked depend on which type of student you are

Questions

- The Pulse dashboard is split into 5 areas.
- Influencing factors
- Motivations and barriers
- Student journey
- Student experience
- Media and targeting

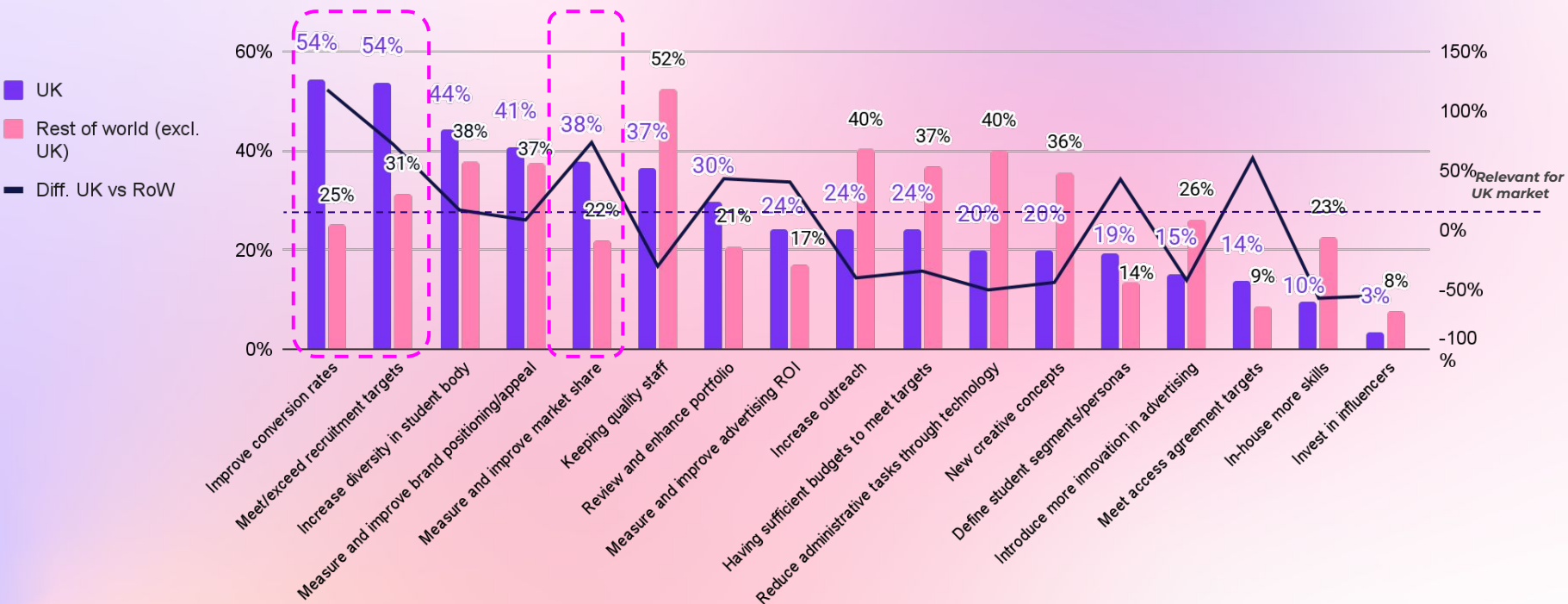
Dashboard

- Pulse responses are updated in the dashboard each month.
- Highlights and key findings are updated quarterly
- Findings can also be found in our Culture Report



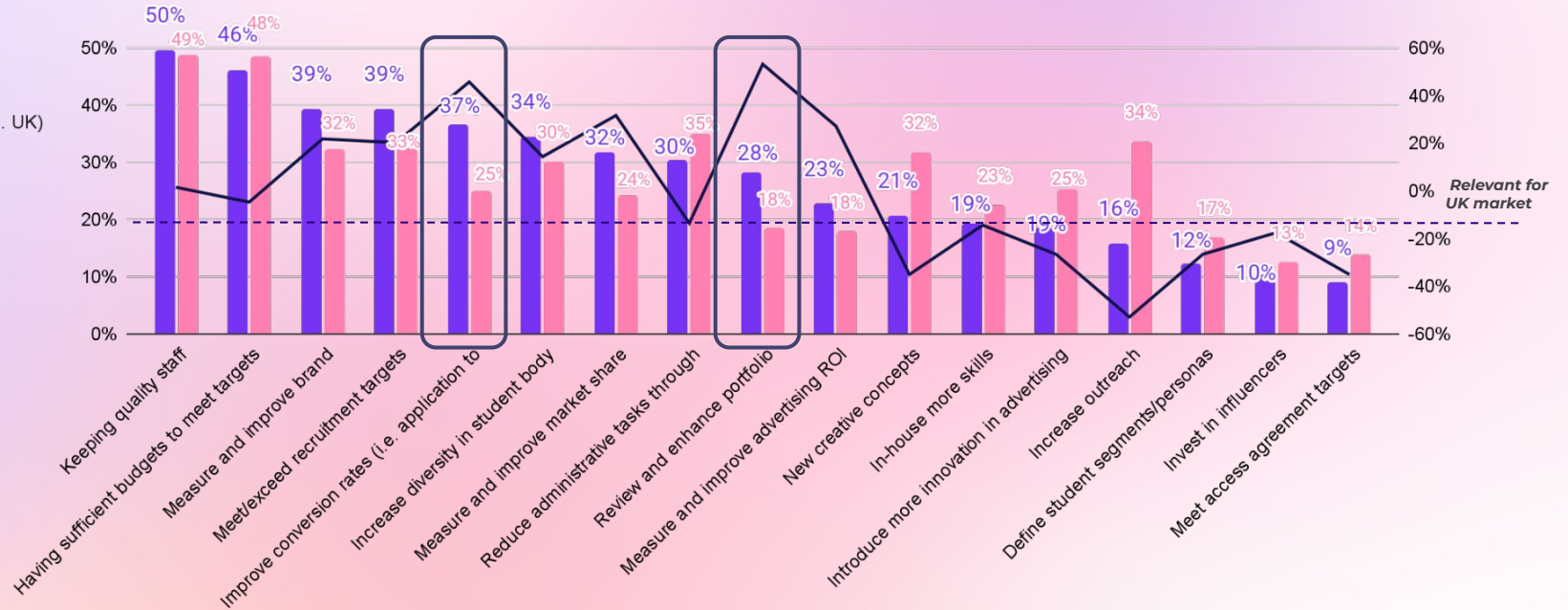
UK 2023 VS Global 2023: Priorities in detail

The UK has greater focus on improving conversion rates and market share



UK 2023 VS Global 2023: Challenges in detail

As well as conversion rates, the UK finds portfolio issues more challenging





UK marketers - where top 5 priorities and challenges overlap

PRIORITIES



- **54%** Improve Conversion Rates
(I.E. Application To Acceptance)
- **54%** Meet/Exceed Recruitment Targets
- **41%** Measure and improve brand positioning and appeal

CHALLENGES



- **39%** Measure and improve brand positioning and appeal
- **39%** Meet/Exceed Recruitment Targets
- **37%** Improve Conversion Rates
(I.E. Application To Acceptance)