THE HIGHER EDUCATION MARKETING SURVEY

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NET NATIVES X THE Times Higher Education

Welcome

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Agenda

- HEMS 2023 overview
- Global findings
- US findings
- Summary and recommendations
- Q&A
- Next steps

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HEMS 2023 overview

TO USE **DATA**, **TECHNOLOGY** AND **CREATIVITY** TO TRANSFORM THE WAY STUDENTS CONNECT WITH EDUCATION OPPORTUNITIES

OUR MISSION

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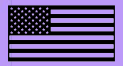
Purpose of the Research

To bring a global community of HE marketers together to:

- ➔ uncover the priorities and challenges for higher education marketing professionals in 2023
- ➔ enable benchmarking on budgets and targets across the sector
- ➔ compare approaches globally and nationally

Key Themes

US Marketers' focus remains on growth from existing markets despite market decline

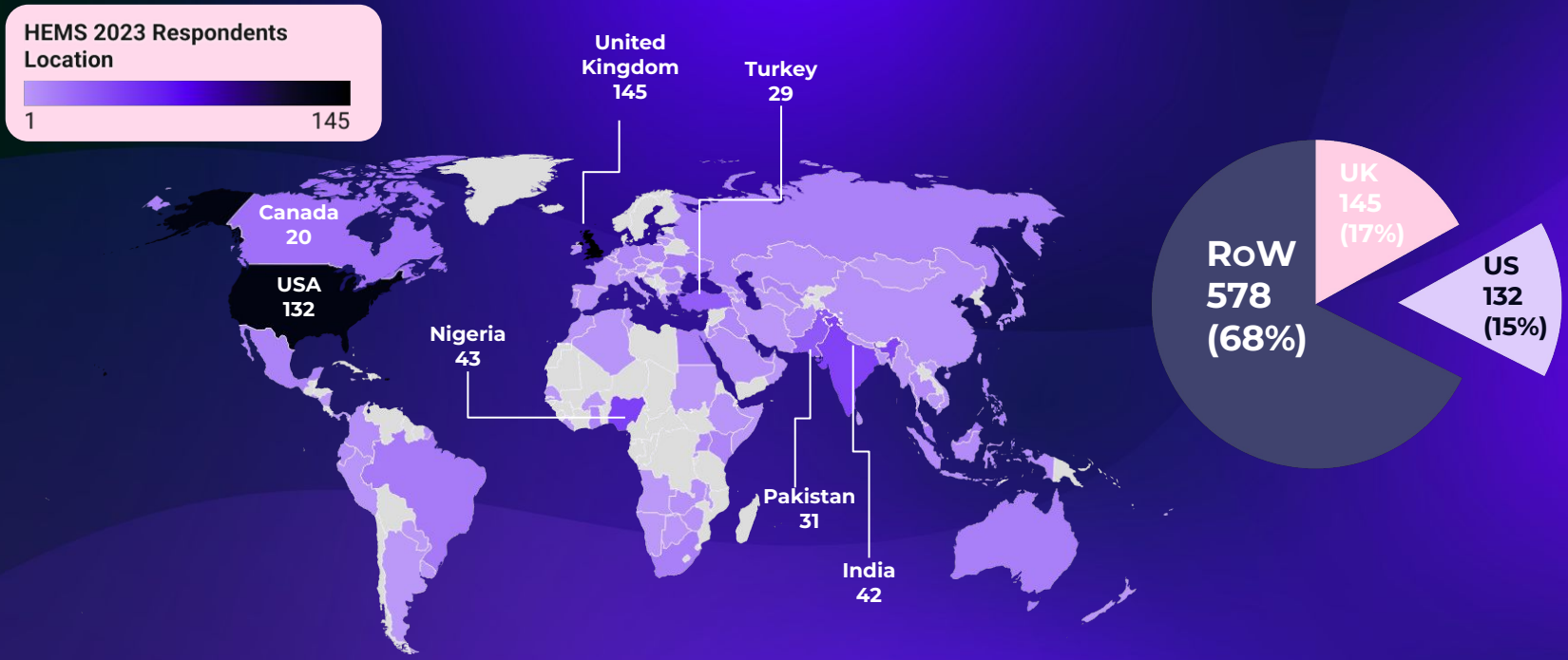


Conversion is a key priority in the US, and proving ROI is very important here

There's a mismatch between what marketers believe is the priority and what students think is important

Pressure is rising on budgets and teams

HEMS 2023 Respondents: Global



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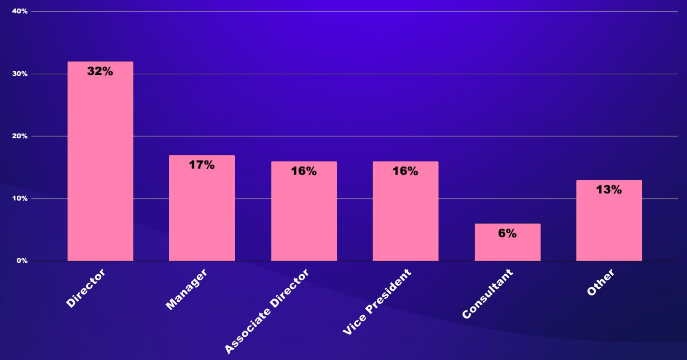
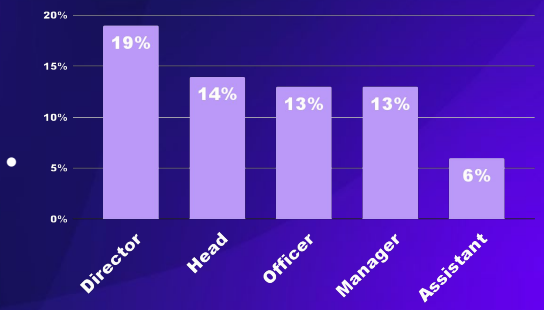
HEMS 2023 Respondents

US institutions



RoW institutions



Level of role

Scope of recruitment

44% Domestic and international

36% Domestic

15% International

34% Domestic and international

33% Domestic

16% International

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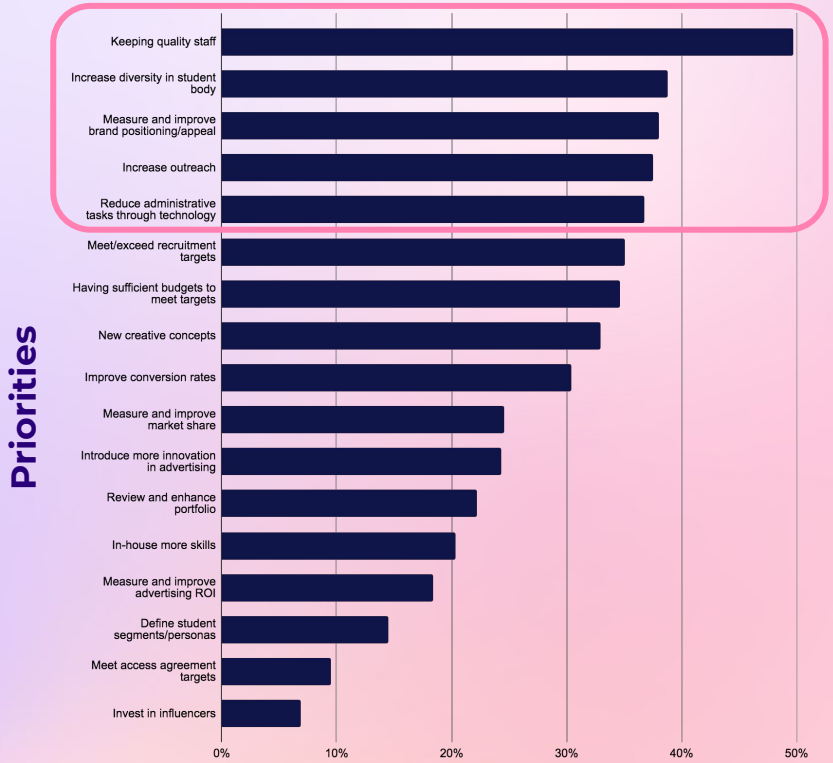
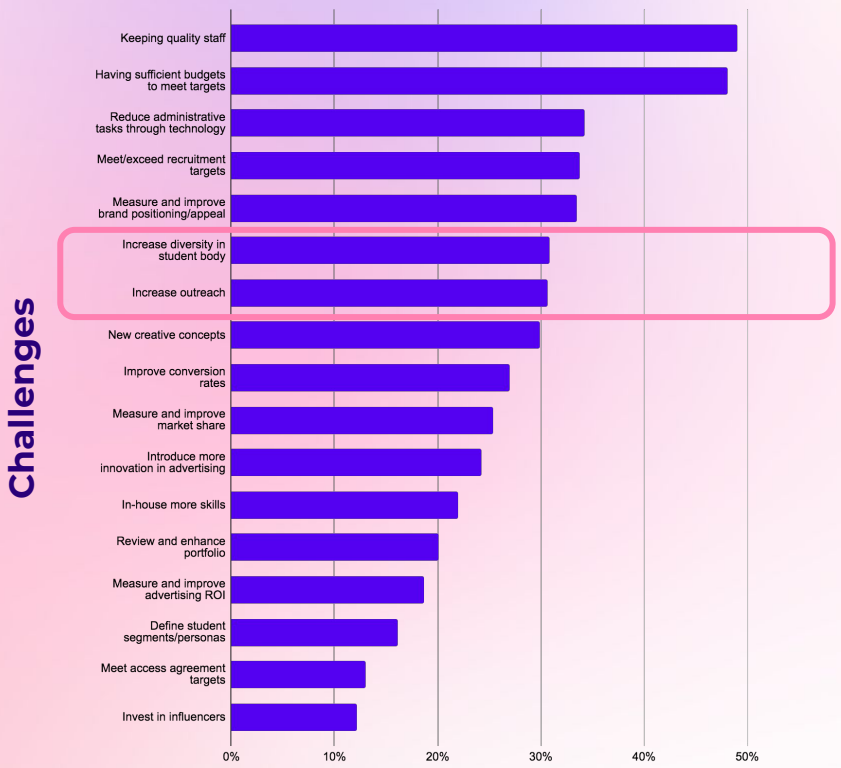
Global findings
Priorities & Challenges

Global 2023: Priorities & Challenges





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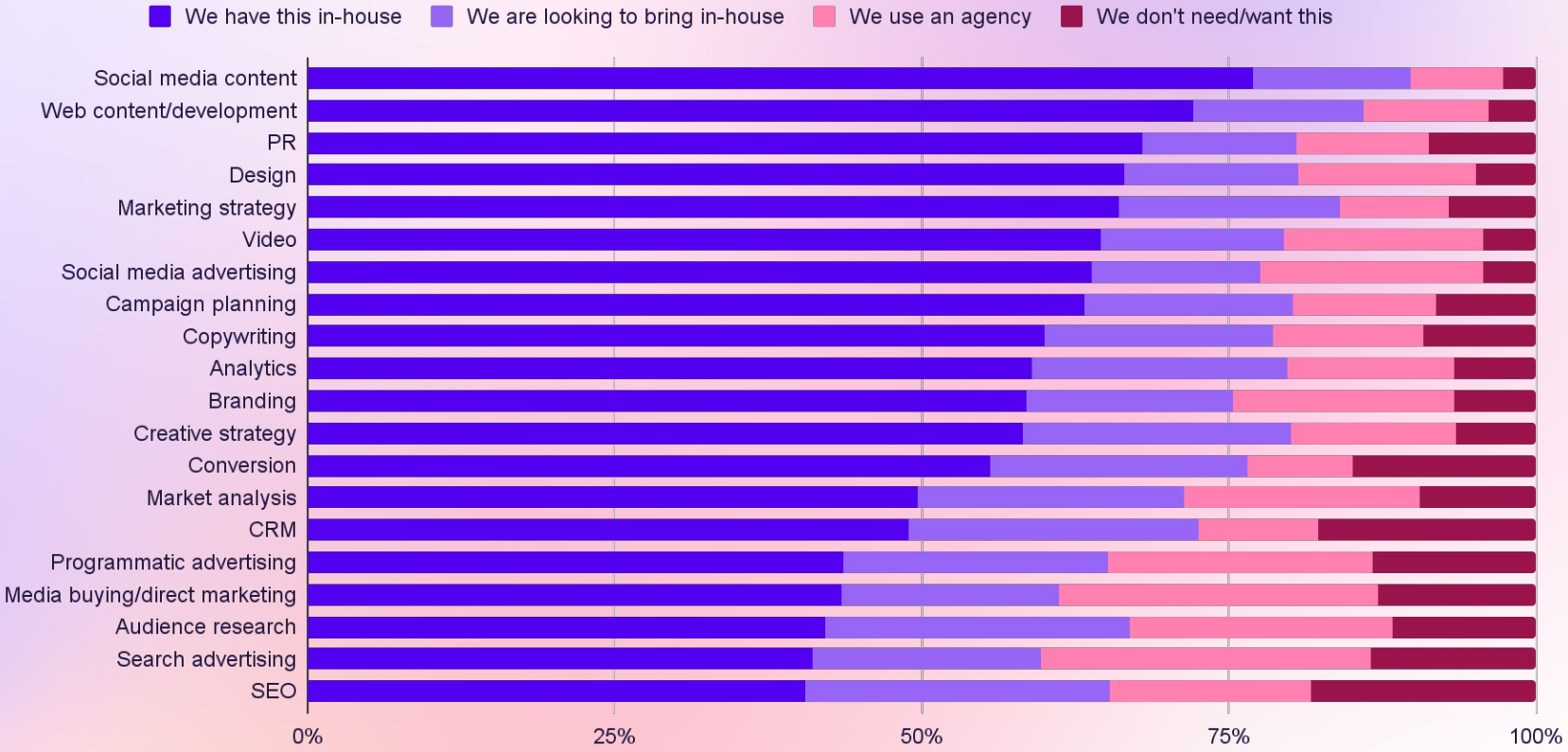
Q. Of these factors, which would you describe as your top five priorities?
Q. Of these factors, which would you describe as your top five challenges?

Global 2023: Keeping quality staff



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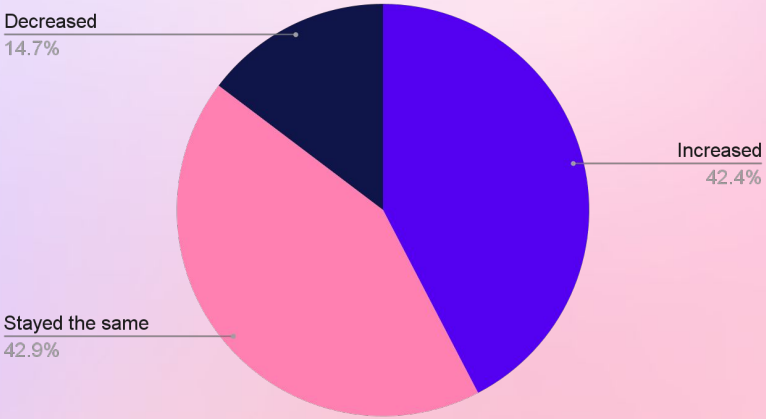
Q. Which of the following skills do you have within your team?

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?

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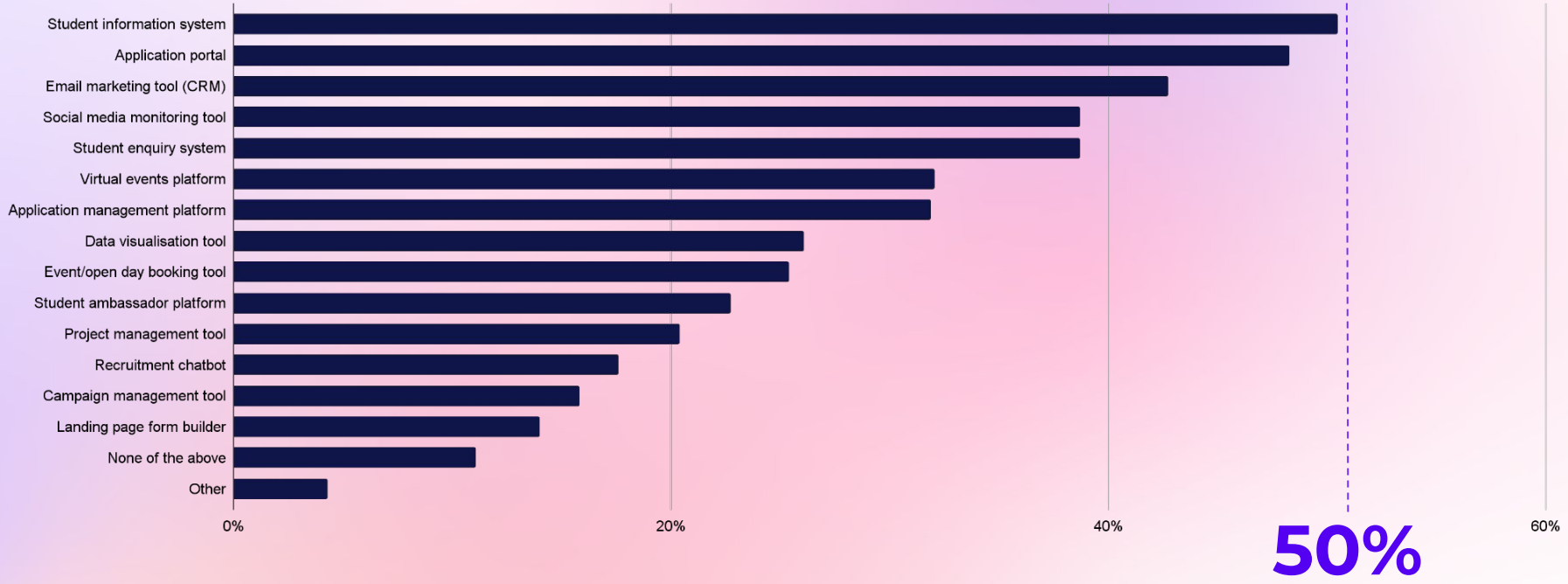
Global 2023: Reduce administration through technology



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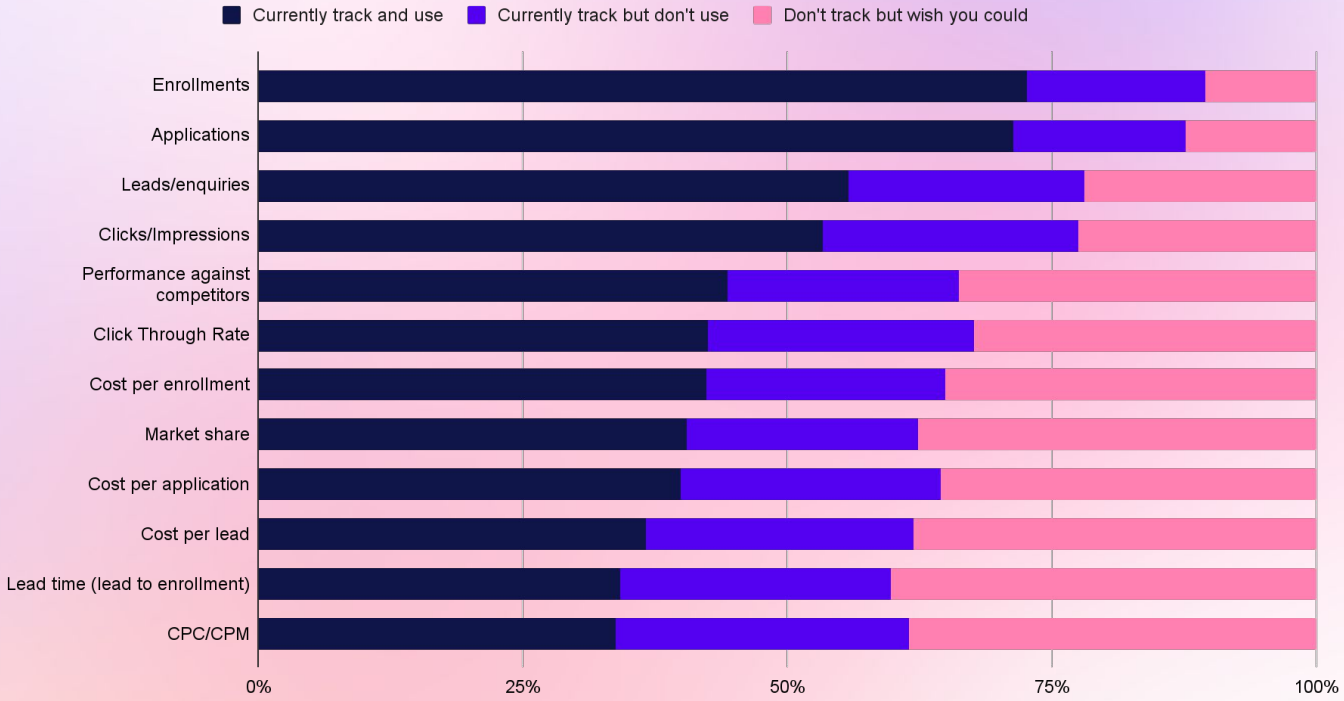
Q. Which of these technology solutions does your institution use?

Global 2023: Reduce administration through technology



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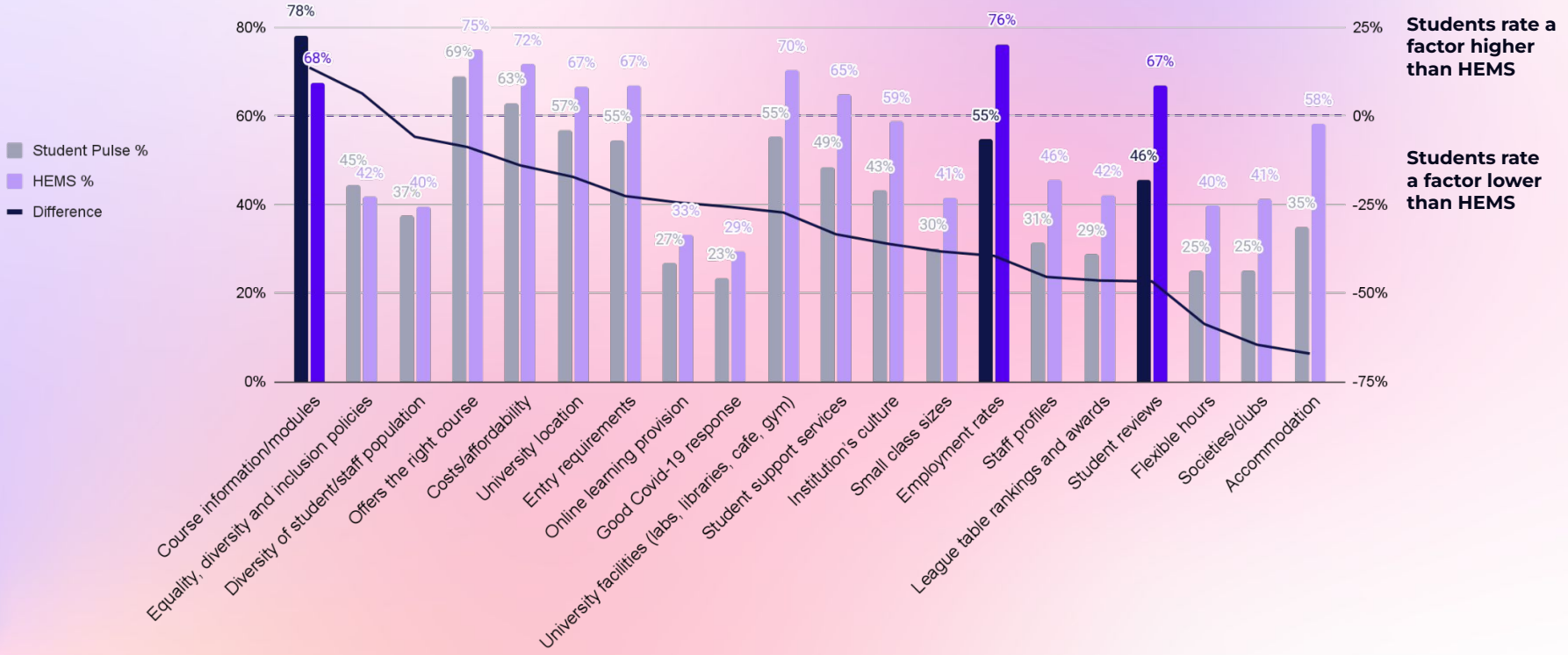
Q. Which of these metrics do you...

Global 2023: Increasing diversity in the student body

Detailed program information is key for students



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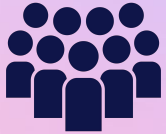
Q. HEMS: Please rate these factors based on what you think students who choose your institution think is important when deciding on a university place
Q. Student Pulse: How important are these factors when deciding on an undergraduate university place

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]

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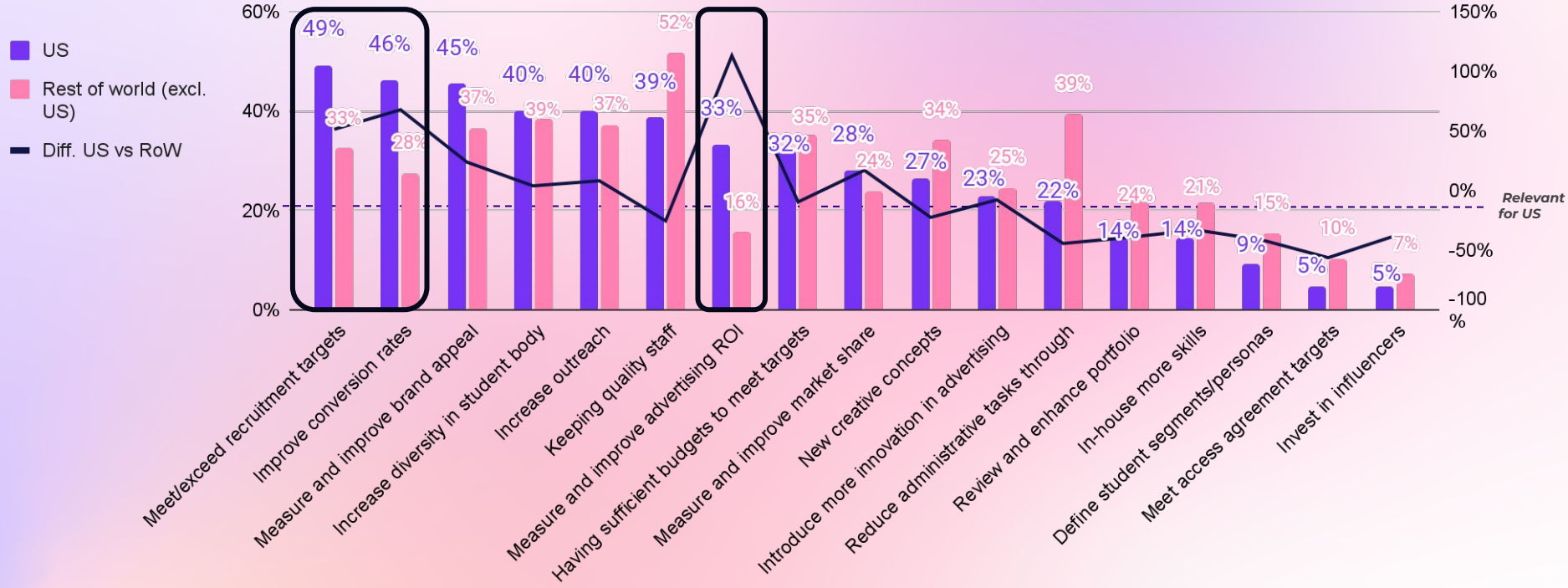
US findings
Priorities & Challenges

US 2023 VS Global 2023: Priorities in detail

The US is focused on recruitment, conversion and ROI



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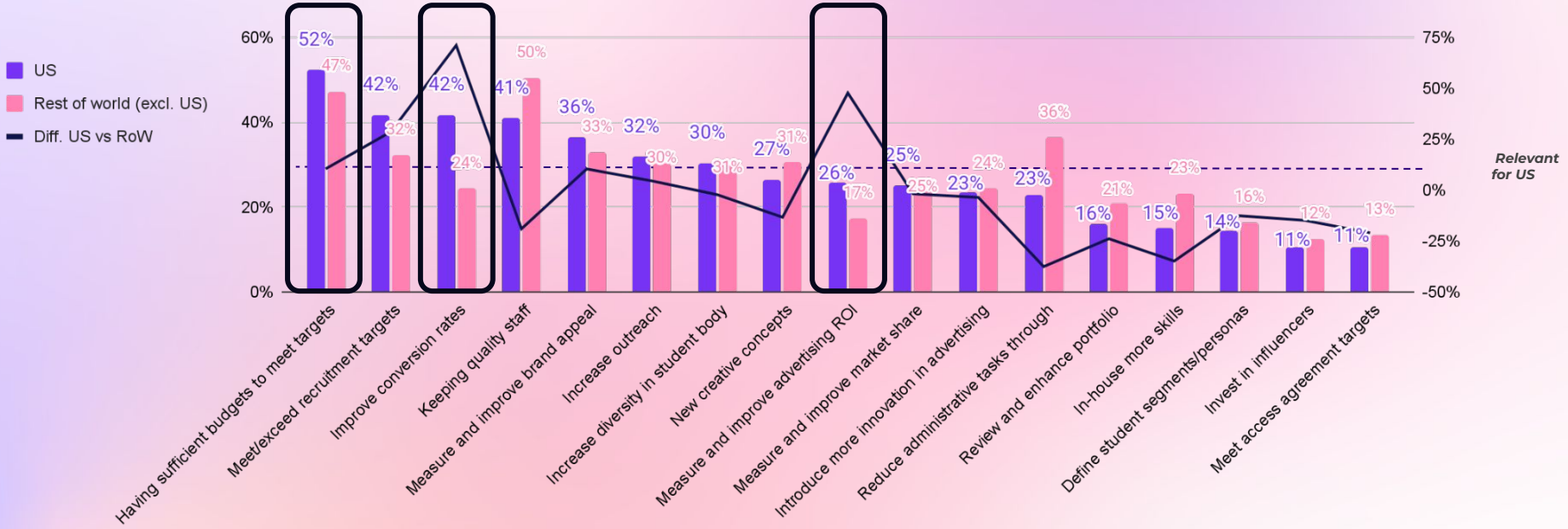
Q. Of these factors, which would you describe as your top five priorities?

US 2023 VS Global 2023: Challenges in detail

Budgets remain the biggest challenge



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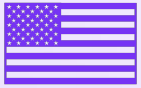
Q. Of these factors, which would you describe as your top five challenges?



US Marketers

PRIORITIES

- → **49%** Meet / exceed recruitment targets
- → **46%** Improve conversion rates
- → **33%** Measure & improve advertising ROI

CHALLENGES

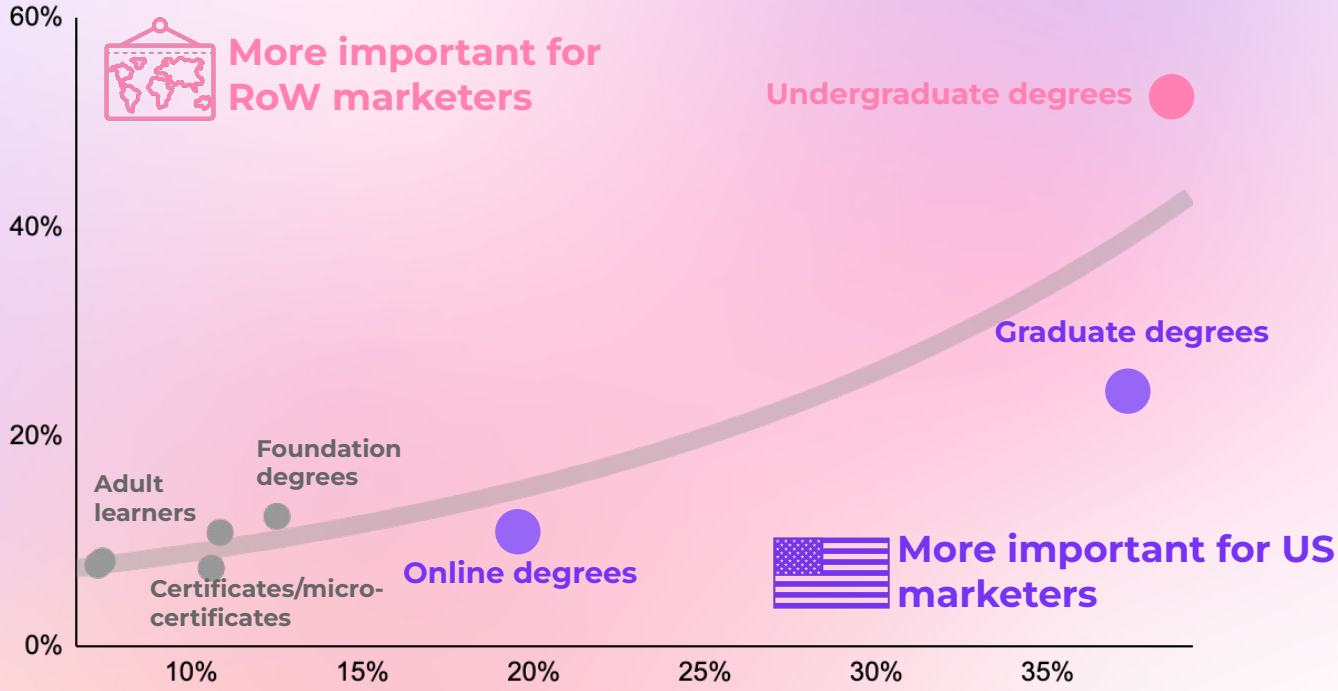
- → **52%** Having sufficient budgets
- → **42%** Improve conversion rates
- → **26%** Measure & improve advertising ROI

US findings

Meeting recruitment targets

US 2023 VS Global 2023: Key growth areas for recruitment

Postgraduate degrees and Online degrees are more important in the US



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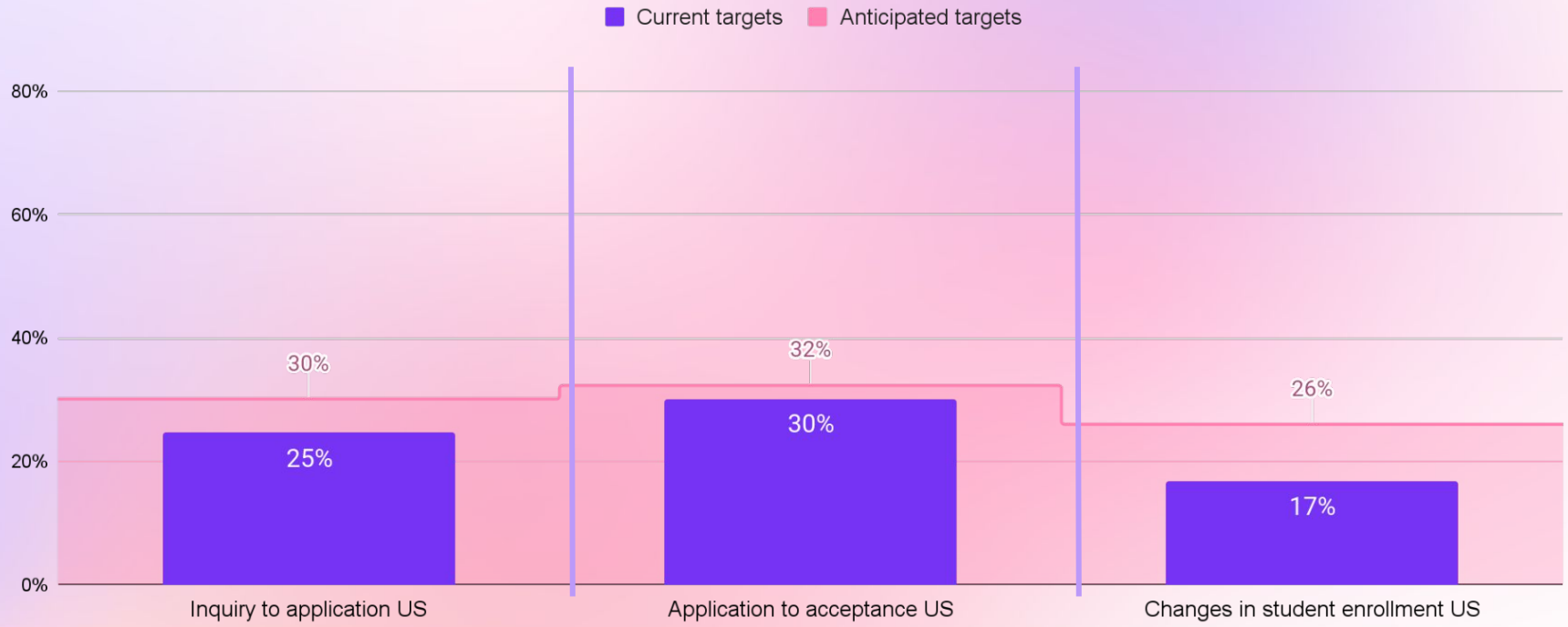
Q. Which of these are key recruitment growth areas for your institution?

US 2023: Targets

Growth anticipated in recruitment, but not in retention



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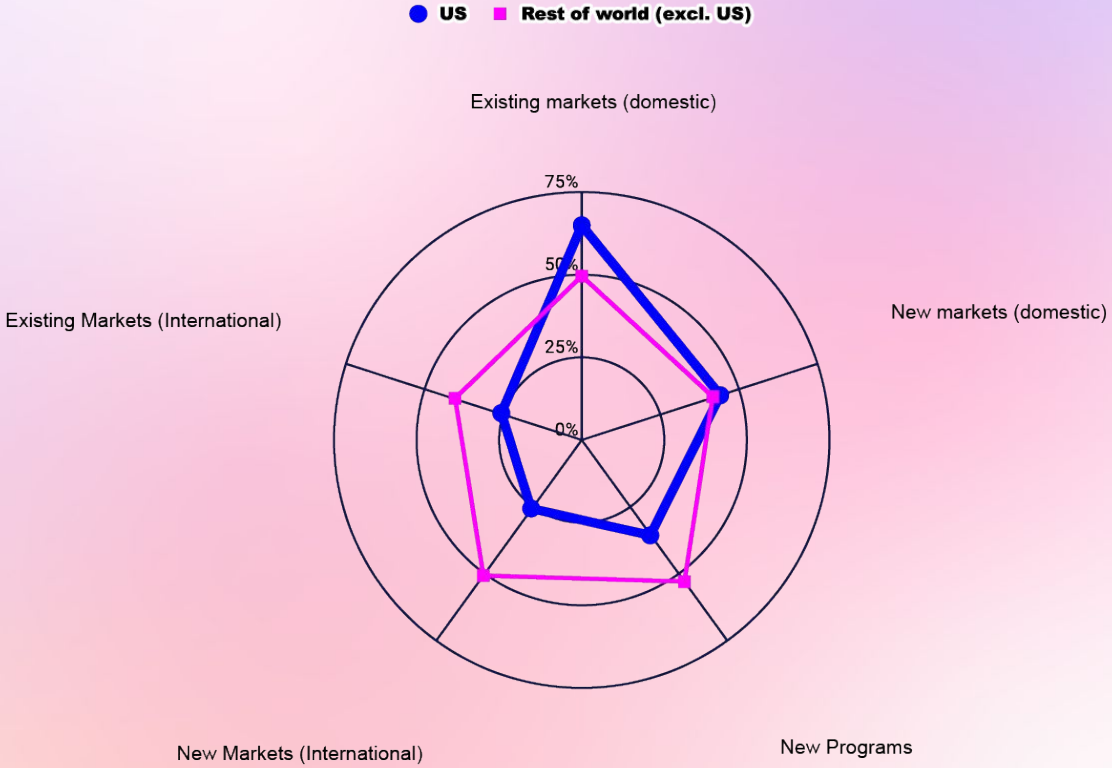
Q. Where known, please detail targets (current and anticipated)

US 2023 VS Global 2023: Expected growth areas

US mainly reliant on existing markets for growth



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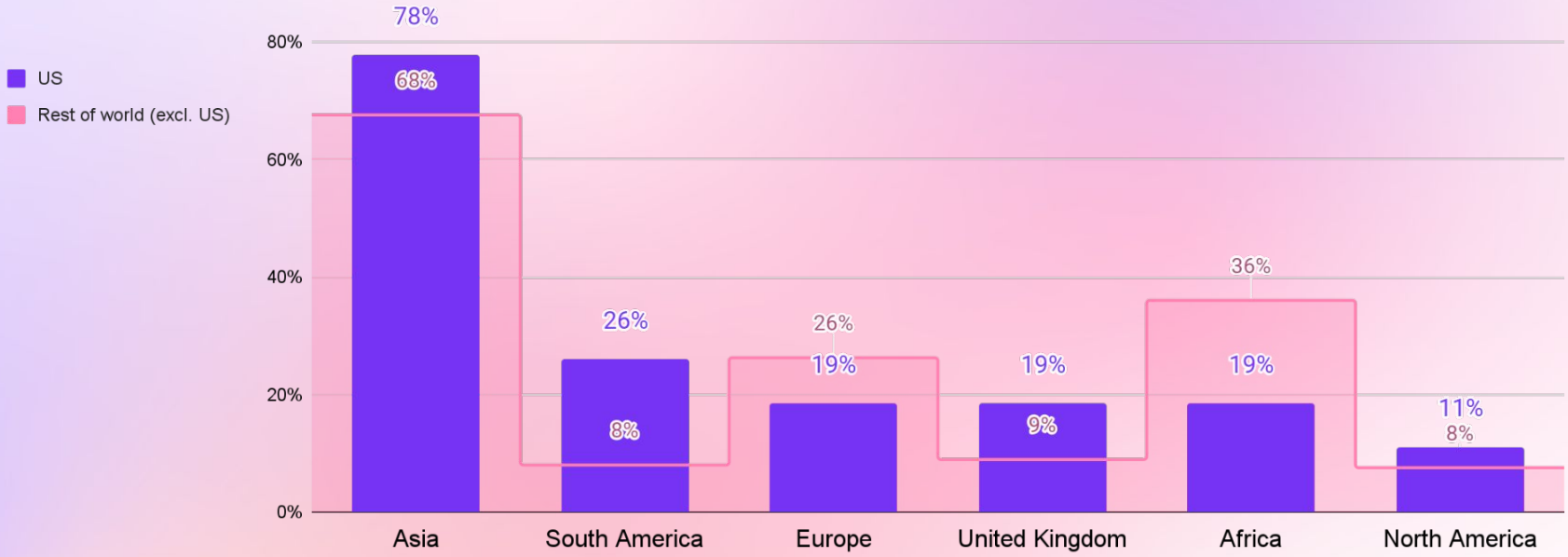
Q. Where do you expect growth to come from in the next 12 months?

US 2023 VS Global 2023: Key growth areas international markets

Reliance on Asia greater for the US than RoW



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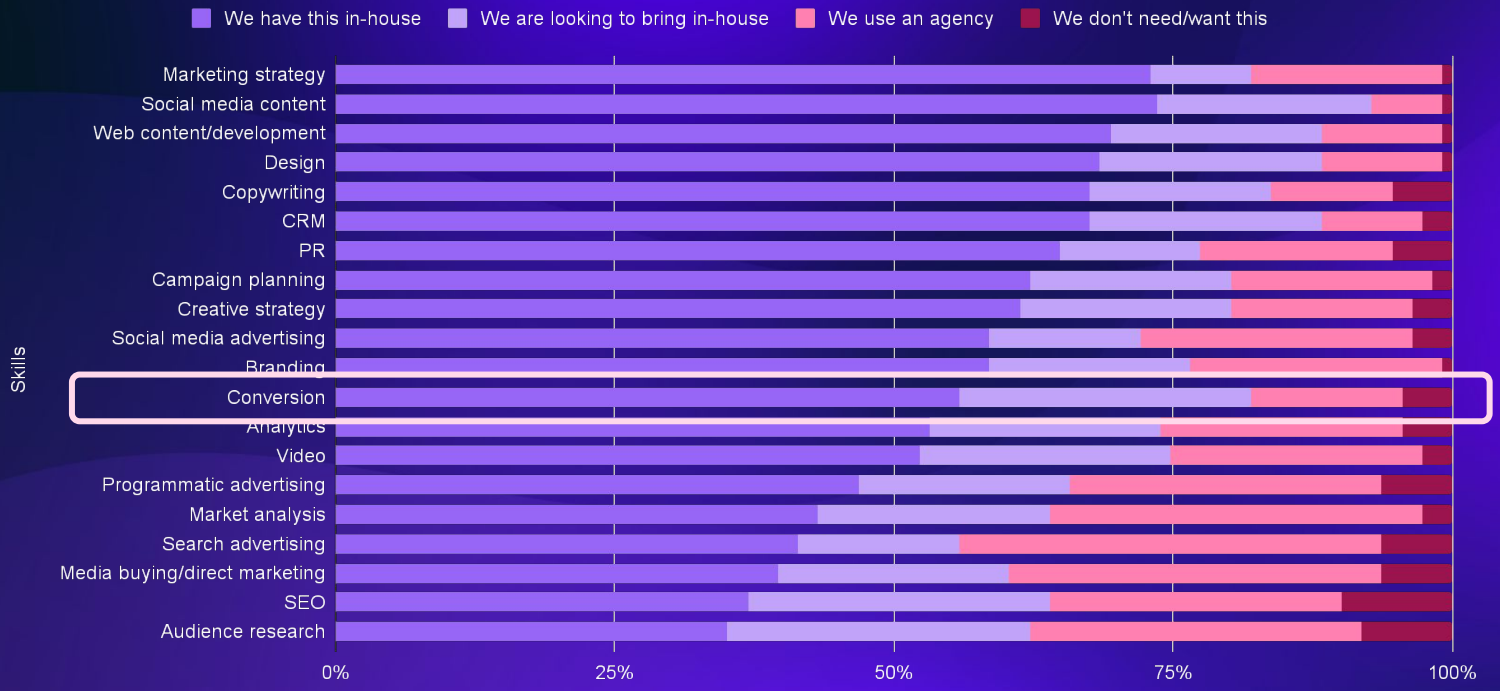
Q. What do you anticipate to be your top three new countries for recruitment?

US findings
Improving conversion

US 2023: In-house Skills

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



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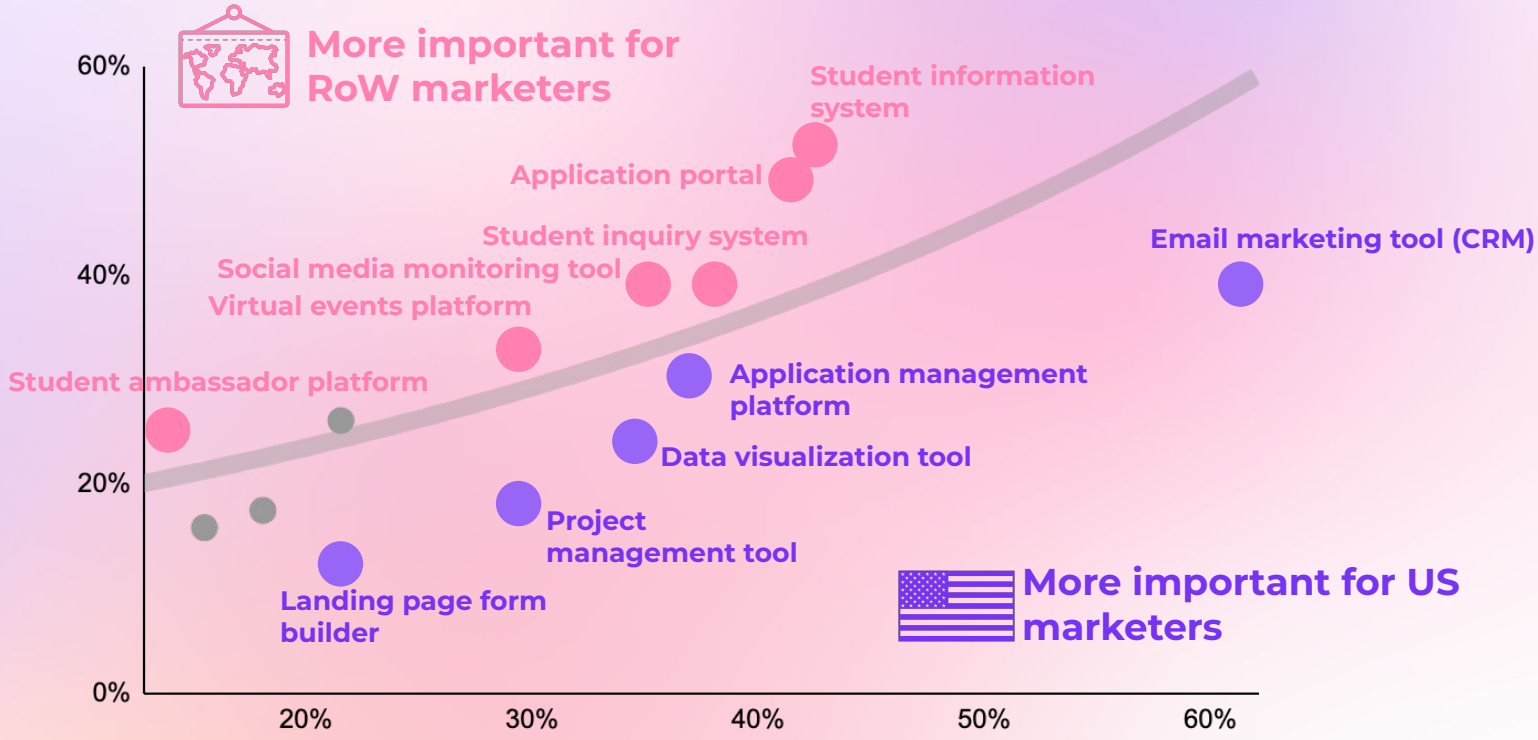
Q. Which of the following skills do you have within your team?

US 2023 VS Global 2023: Technology solutions

US marketers most likely to be using CRM/email marketing



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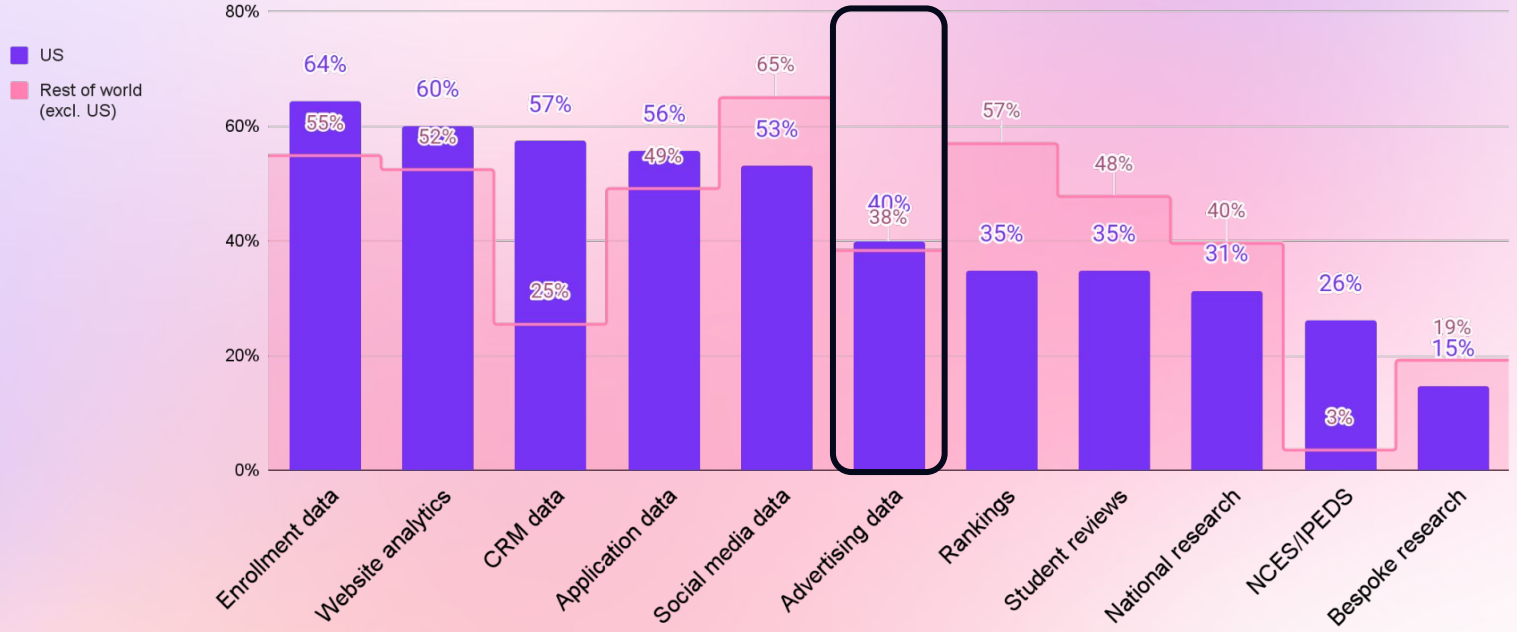
Q. Which of these technology solutions does your institution use?

US findings

Measuring & improving ROI

US 2023 VS Global 2023: Measure & improve advertising ROI

Strong use of data to measure ROI



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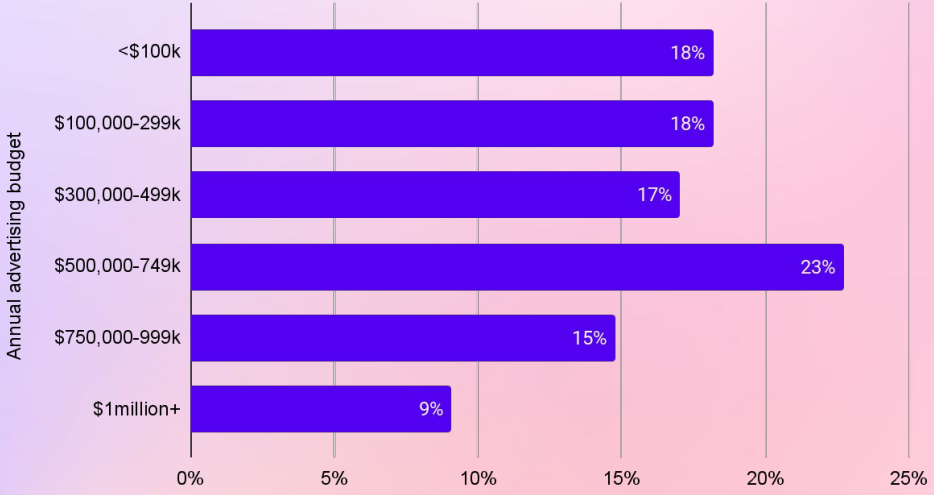
Q. Which of these data sources do you currently use to inform your advertising campaigns?

US findings
Budgets & plans

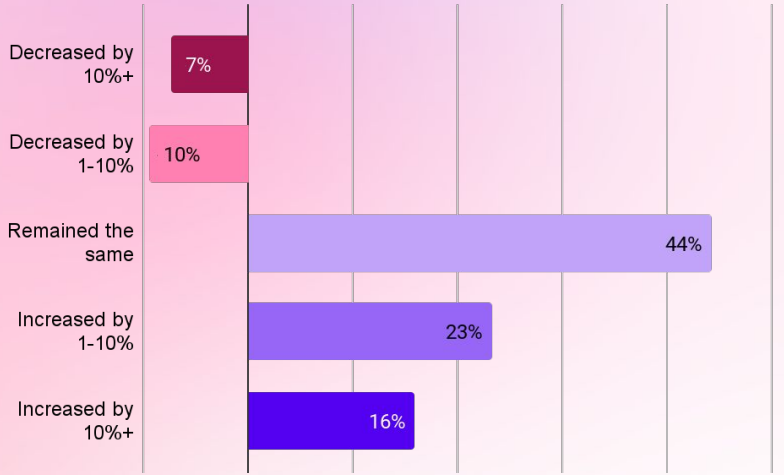
US 2023 Budgets & plans

Variation in budgets across the sector

Annual advertising budgets



Year on year budget change



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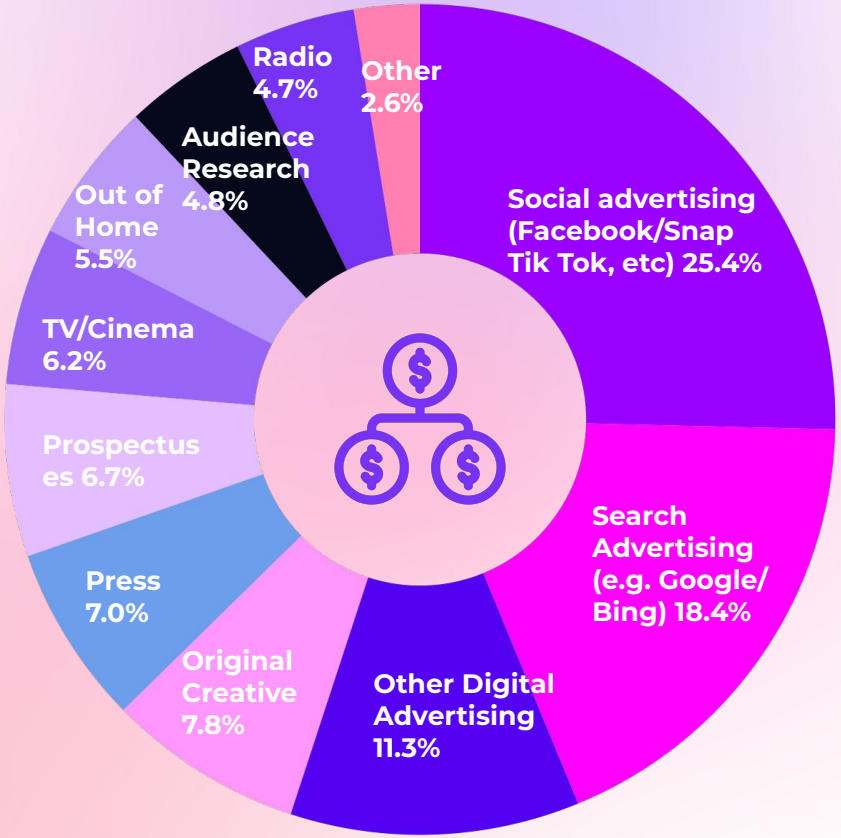
Q. Excluding staff salaries/costs, what is your annual budget for advertising?
Q. How has your annual advertising budget changed in the last year?

Global 2023: Budgets splits 2023

Majority spent on digital advertising

+55%

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



Q. Roughly, what percentage of your annual advertising budget go toward...

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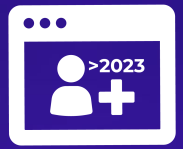
US findings
Summary and recommendations

HEMS 2023 Summary: Key Findings

- US Marketers' focus remains on growth from existing markets despite market decline

- Conversion is a key priority in the US, and proving ROI is very important here

- Pressure is rising on budgets and teams



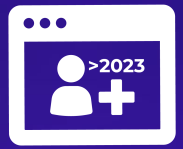
- There's a mismatch between what marketers believe is the priority and what students think is important

HEMS 2023 Summary: Recommendations

- Investigate opportunities for innovation and diversification: new markets, new programs

- Invest in the right tech to measure ROI and support the strongest possible conversion

- Use HEMS data to benchmark your department and budget, and make a business case for greater investment

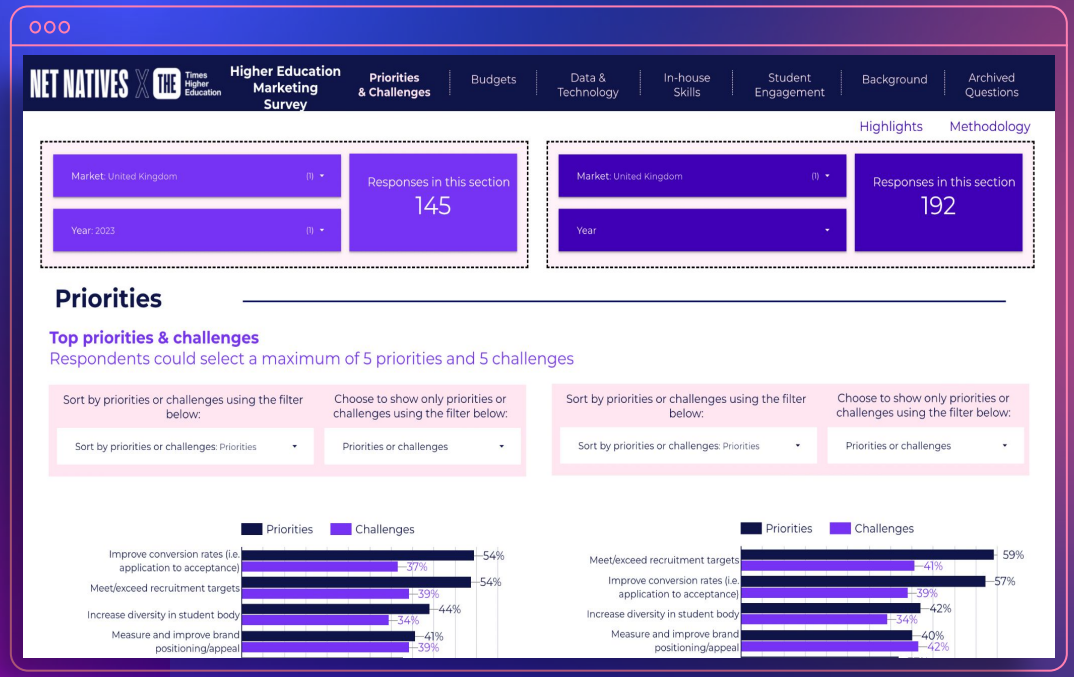


- Review messaging through the recruitment funnel to make sure you cover a range of topics and cater for diverse audience needs

Find out more...

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

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



Thank you

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Questions for us?