

AN ISURUS/WCM/DECIBEL MEDIA REPORT

Higher Ed COVID Disruption and Opportunity: Leadership Survey

Marketing and Enrollment Management's perspective on adapting to the long-term implications of COVID-19



Introduction

Higher education needs to balance the immediate and short-term implications of COVID-19 with the longer term, cumulative implications of the pandemic and the pre-existing headwinds facing the sector.

With all due respect to Mr. Gee, our research revealed that within marketing and enrollment management, there is a growing realization and even cautious optimism that the current crisis will bring change at a pace not previously possible, yet sorely needed.

This research examines the longer-term trends and implications for higher education, with a specific focus on marketing and enrollment management leaders. They often work in the shadow of their academic peers, yet their work is more essential than ever to the health and viability of the institution. Our goal is to share experiences and insights that will help institutions adapt in a difficult and highly competitive environment.

Change is a pervasive theme throughout the findings. The report begins with an assessment of the shifts in the landscape of higher ed marketing and recruitment, as a result of or accelerated by COVID-19. We then focus on the tactics and actions institutions predict are needed.

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This is an existential time for higher education, without a doubt. Change has not been part of higher education’s portfolio. Although we are viewing this as a dynamic moment, everyone wants the world to remain sort of the same that it was – and it will not.”¹

— Gordon Gee

The findings are based on in-depth interviews conducted in June, 2020 with marketing and enrollment leaders in fifteen colleges and universities with enrollments from 1,800 to 90,000 students, supplemented by discussions with higher education consultants and EdTech leaders. This deep-dive approach produced thoughtful discussions on complex issues in a very dynamic environment. A summary of the participating individuals and their organizations is included in the report appendix.

Interview data is analyzed in the context of decades of higher education experience from the author team:

- Isurus Market Research and Consulting
- Wallwork Curry McKenna Marketing and Advertising
- Decibel Media

Market Shifts and the Changing Higher Education Landscape

Our panel of marketing and enrollment leaders forecasts four major shifts in their target audience and the competitive landscape.



TREND 1

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The biggest change is that the consumer, whether the consumer is the student or the parent or both, has gotten much more scrupulous about our product. They're questioning the value of higher education more than ever before.”

Increased focus on value and ROI

The economic impact of COVID-19 will reduce household income for many families, making higher education less affordable. Students and families have witnessed the challenges of Millennials who graduated with high debt burdens. Parents of incoming students experienced the 2008 economic recession, which has increased their focus on career-oriented education for their children. And, the competition for students enabled by the 2020 NACAC decision creates more opportunity for students and parents to comparison shop. These dynamics will lead students and families to analyze the return on investment for higher education, and look for ways to reduce cost and maximize value.

“Now I think we're going to see parents asking ‘Should I send my kid online a little bit before I send them to a traditional environment, if at all, and save some money to get the education?’”

TREND 2

Students will take more control of defining their educational experience



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Institutions will have to rethink how they define ‘prospect’ student and how they define ‘retention’. We expect students to bounce around more instead of committing to one institution for their full degree. They could complete core classes at community college, or online or at a state school, then transfer to focus on a major or a particular specialty. Marketing and recruitment need to expand beyond the traditional audience of high school seniors.”

The abrupt shift to remote learning has accelerated a pre-existing trend: students expect more customization and control over their educational experience. While a very challenging transition, institutions are now better equipped to recognize and respond to student demands for flexibility in their educational experience.

More students will seek alternatives and curate their educational experience, rather than follow a traditional model. Marketing and enrollment leaders expect more students to pursue an ala carte educational experience that encompasses different learning delivery modes, more career-focused learning experiences, and combines experiences across multiple institutions.



TREND 3

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My read of the data is that people want to stay close to their home. I can definitely see family members saying, ‘I don’t really want you to leave my clutches right now. I want you to stay nearby,’ or ‘You can commute to this school, you can drive there. You don’t have to be in a dorm.’

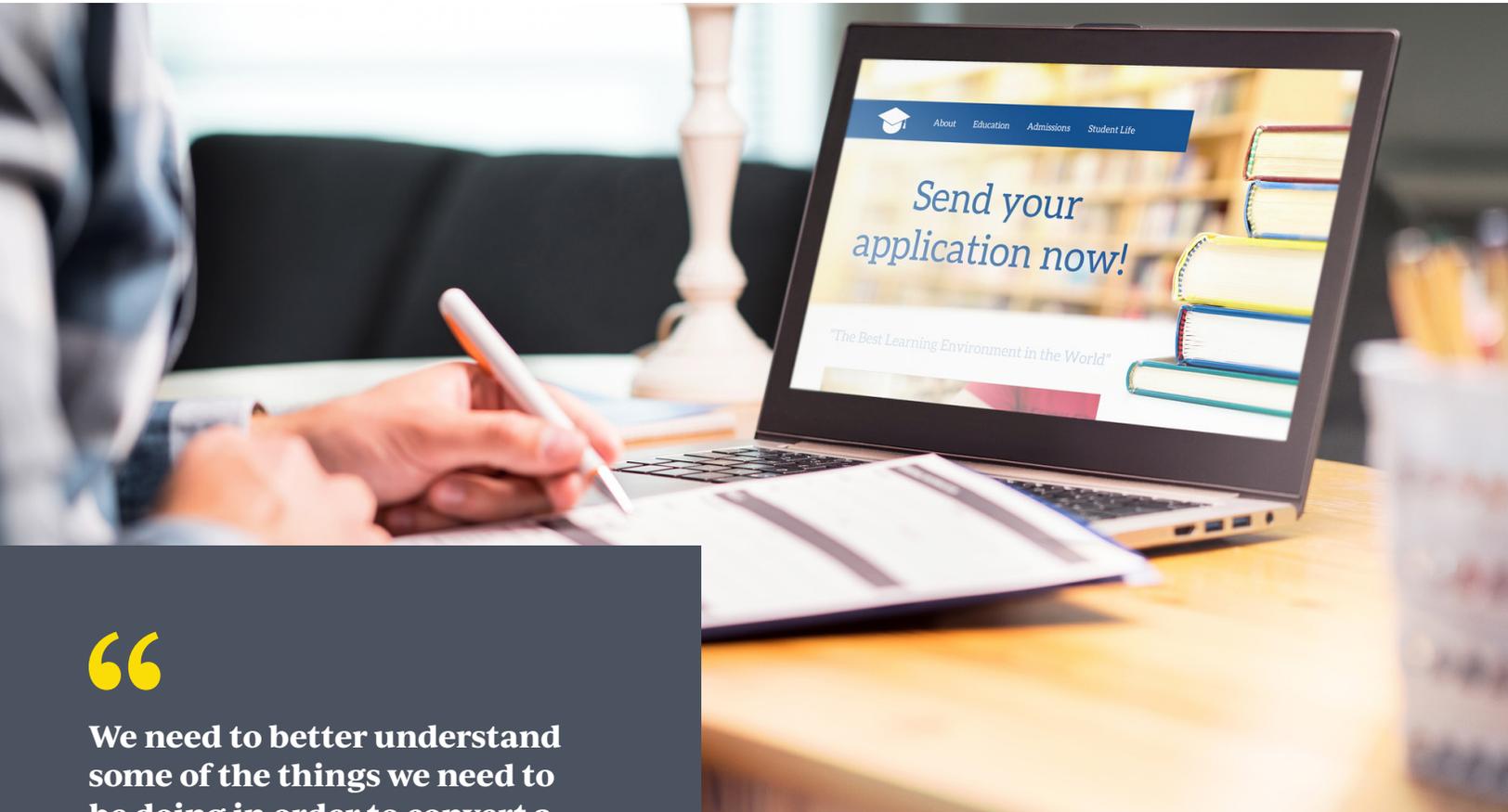
“In the last few years, we felt it became harder to attract international students. It was partly the cost of U.S. education and also the perceptions of the U.S. political and social climate. I anticipate that once COVID recovers that international enrollments will come back up, but it will just be interesting to see if there are longer-lasting effects on international enrollments beyond COVID.”

Geography and borders will increasingly shape enrollment decisions

For domestic U.S. students, the potential for virus flare-ups makes them and their families more risk averse about attending college far from home. Marketing and Enrollment leaders expect families to focus more on residential campuses closer to home, as well as more demand for commuter campuses where students live at home, due to safety and affordability. International students face all of these same considerations, in addition to limitations imposed by border closures or federal and state policy.

TREND 4

More investment in effective digital analytics



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We need to better understand some of the things we need to be doing in order to convert a prospect to an application. Right now we don't have enough data to understand what's the tipping point.”

“We should be able to track every single application back to where it came from and how we got it. And then, we should understand how much it cost us to get it, and then we should be making decisions on how we spend our marketing money based on that data.”

As a result of increased competition for students, and more reliance on digital marketing and experiences, institutions see the effective use of data as more critical than ever. However, marketers and enrollment leaders are recognizing their current limitations. Analytic tools and solutions are evolving rapidly, and most institutions plan to build on their existing capabilities in order to monitor activity, track metrics, and respond quickly to changes throughout the enrollment cycle.

Implications

In the context of these four broad trends, marketing and enrollment leaders see four main implications for their work.



IMPLICATION 1

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Admissions people, we're always afraid to stop doing something. So the fact that the market is forcing us to stop doing some things and invest in some other areas is helpful.”

“This situation has opened up a lot of people's minds, but I think it will persist. Without this event of the pandemic, we would be right where we were. We would be talking about this as, yes, something we should really think more about, as opposed to doing it.”

Change and experimentation will become the new normal

Beginning in March, 2020, marketing and enrollment leaders were forced to quickly make dramatic changes, and that accelerated pace of change will continue in the coming months. While this has been incredibly stressful and difficult, they see “silver linings” for the future. Initiatives that were spun-up quickly during the shutdown had previously been discussed as long-range possibilities. They've embraced a willingness to consider and implement new strategies and services. Moreover, marketplace dynamics will require greater agility and innovation.



IMPLICATION 2

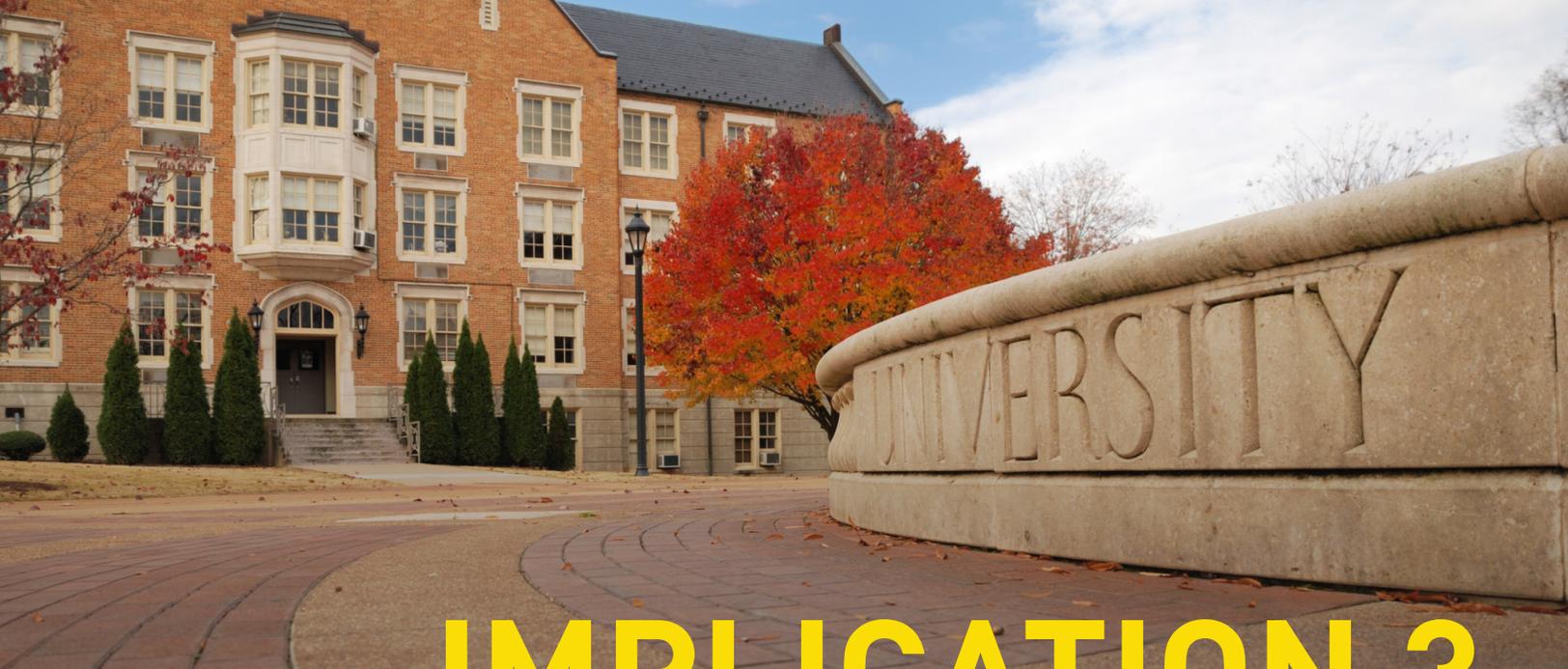
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One of the biggest things in the 2025 strategic plan is a University system more seamless for students, whether they wanted to take a semester online or attend classes for a semester in their local campus versus coming to the central campus. But before the pandemic it was slow-moving progress. The pandemic really accelerated it.”

“One of my responsibilities is an integrated service center. It worked on an 8:30 to 4:30 environment, which is what the employees wanted. The students wanted evening hours and Saturday hours. Before the pandemic, employees fought me on changing the hours to fit student preferences.”

Institutions need student-centric strategies and experiences

With heightened focus on affordability and rising demand for a more flexible degree path, many institutions will be adopting student-centric strategies and experiences. This process starts with understanding recruitment, admissions and matriculation through the student's eyes, layered with the touchpoints students navigate in their journey from prospect to graduation.



IMPLICATION 3

Prospective students need more compelling and differentiated messages

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If you keep sending out emails talking about the diverse student body and beautiful campus, and large alumni network and over 100 academic programs, you're going to be white noise.”

“More institutions will offer blended education, which makes it harder to show what's truly different and unique about “my” institution.”

“Personalization is the future of marketing in higher ed. We want to talk to Gen Z in a way that engages them. In higher ed we tend to be very ivy-covered tower, we talk in a very proper tone and it's just not how kids communicate.”

Institutions already felt pressure to refine their messaging and positioning. The pandemic shutdown highlighted the high degree to which their messages and brand are focused on the campus experience. Institutions now must deliver marketing messages and recruitment experiences that are differentiated and effective regardless of where, or how students are learning.





IMPLICATION 4

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We expect more of a shift to emphasize the local student from the region. Especially in the next few years, students will be looking in their own back yard. Our state public institutions will be a bigger competitor, especially as prospects and parents get more cost sensitive in the recession.”

Institutions will focus more on students in their local region

As U.S. students look for institutions closer to home, and international students find it harder to come to the U.S., marketing and recruitment will take on a stronger local focus than seen in decades. There are several implications to this shift. Institutions worry about the negative impact on the class they can shape, without being able to include as much diversity of students from around the country or world. Some institutions expect to have a better chance of enrolling students who would previously have selected a more distant location. Institutions expect their competitive set will change too: a 4-year private school may compete more directly with state public institutions than in the past.

Strategy and Tactics: Digital Will be the Driver

The heavy emphasis on digital is no surprise, given the nature of the current pandemic crisis, the evolving analytical tools and media available to institutions, and the reality of how prospects and students today seek and use information. Beyond adapting to the current moment, the events of recent months reinforced the need to invest in digital capabilities. While none of these leaders describe it as digital transformation per se, digital strategies will receive renewed focus in the years to come.



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Institutions feel “data rich and insight poor”



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We collect a bunch of data, but is anyone actually analyzing it? Are we using that to change the way that we operate? That’s my focus for the next year, to make sure that we’re actually using the data that we have. We have a lot of work to do to get us to where we need to be.”



“When I look at our analytics capabilities, we’re good in some areas and terrible in others. There’s also the art of it too, meaning how do you make decisions based upon what’s in front of you? I know a lot of people that are terrific at looking at data but then make the wrong decision based off of it!”

Marketers and enrollment leaders recognize the critical need for advanced analytics, including the use of artificial intelligence, to enable them to get the insights necessary for more effective decisions and faster adjustments.

Most institutions plan to build on their existing data and analytics capabilities in four areas:

- **Derive insight and action from data.**

Marketing and enrollment leaders see untapped potential in data they already collect. Barriers to using data are typically around staff resources, such as the lack of a dedicated data analyst. Some institutions see their tools as the barrier and find the analytics in their CRM to be insufficient. For larger institutions, siloed data in disparate systems prevents a more holistic view of student behavior.

- **Updated models.**

The pandemic threw off models for the next enrollment cycle, and perhaps longer. Institutions find themselves in uncharted territory as they work to fill and shape their next class.

- **Predictive and prescriptive analytics.**

To derive more from their data, institutions look to better analytics. Marketing and enrollment leaders are both daunted and excited about the new and different types of data they’re gathering on the student journey digital interactions. It is pushing them to evaluate the rapidly evolving analytics tools and solutions that can better inform their decisions and actions..

- **Reliable metrics.**

Leaders in this research underscore the need to understand how well marketing and recruitment is working, and the ability to change course as needed to achieve enrollment goals. To do this, they need new and reliable metrics at various points in the enrollment funnel. Their challenge is to identify which metrics are most predictive at each stage.

2

Virtual experiences will be essential mainstays throughout the enrollment funnel



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I've been amazed at the number of students who have now scheduled classes and are getting ready to pay their bills, who have not ever been to our campus. All of our research before this situation showed us that for us to get a student to actually enroll here in the fall, 73% of them had to have a campus visit. Nobody believed that you could convince the student to come and spend the amount of money they're going to spend, and four years of their life, to a place they had never set foot on before.”



“Our traditional use of counselor visits to schools and college fairs doesn’t allow us to nurture as many new relationships as we’d like or take risks on new schools. Now that we’re doing all of this virtually, we’ve been able to set up virtual events with high schools we haven’t contacted before. In our virtual events, we’re seeing students from all across the U.S. and international locations, where those people may not have been able to visit in the spring.”

The shutdown abruptly pushed virtual experiences to the forefront for recruitment and admissions. Some institutions were grappling with internal resistance to virtual experiences, but the experiences of 2020 have permanently removed these barriers.

Institutions know that prospects, as digital natives, bring high expectations for any online or virtual experience. The hastily constructed video tours and Zoom sessions used in the 2020 admissions cycle were acceptable in an emergency. That said, marketing and enrollment leaders recognize that they need more virtual offerings and a more robust experience to compete in the future.

Institutions see both opportunities and risks to more virtual experiences. In virtual experiences, prospective students and families have more control about how, when and for how much time they engage. The metrics and formulas used to forecast enrollment will need to be reviewed, and probably revised. Enrollment leaders aren’t confident that they understand the conversion rates for virtual experiences, and how to account for this activity in their modeling.

Lead generation will rely much less on SAT and ACT lists

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The SAT is nothing more than a direct mail fulfillment house for higher ed. Without the SAT lists, it actually opens the door for marketing to be that much more effective and much less wasteful.”

“We haven’t previously done much SEM or SEO, that will be new for us. We will need to develop and fund digital marketing, but with the same staff and budget that we have today. We’ll need to figure out how to reallocate resources.”



“In the past, we haven’t done a lot of paid digital because it’s so cheap to buy names through SAT. So, with those numbers being down dramatically, we are trying new things on paid social channels to try and cast a wider net.”

Marketing and enrollment leaders predict the pandemic will accelerate the demise of the ACT and SAT. For admissions decisions, institutions in this research are confident better indicators for college success exist, and more and more institutions are test optional. The bigger impact will be the loss of a primary source for prospective student lists. Prospect lists purchased from SAT and ACT have been central to marketing communication strategies for many institutions for decades. That said, marketers are confident they can navigate a path forward and need to implement four tactics:

- Build new capabilities: SEO, SEM, paid social media, events, strong relationships with high schools and other feeder organizations are among the channels that institutions will use to fill the gap left by purchased test lists. They also plan to evaluate their external partners in light of changing requirements. The skill sets that worked for email marketing are less applicable as institutions shift to inbound marketing.
- Understand the student decision journey: For institutions that rely heavily on outbound email and print marketing, inbound marketing driven by digital marketing, social media and relationships requires a better understanding of the student decision journey. Institutions will need to align their marketing tactics and messages with prospect behavior in terms of how they search for information, the type of information and messages that resonate, and sources they trust.
- Define new metrics and ROI forecasts: Institutions are uncertain about the effectiveness of new channels. In addition, budget reductions are expected at most institutions. They will need to quickly evaluate ROI and effectiveness of new channels and identify the appropriate metrics.

Digital capability
creates resiliency.

4

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Every year, one of the bits of boilerplate that I have in my budget narrative talks about how sensitive our business is to changes in the market outside of our control. The examples are global recession, travel interruptions, or pandemic. I've had that in my boilerplate for years. This year, we have them all!





“We’re lucky in that we put our first Master’s program online back in 2013. We’re investing to ensure our students can access our curriculum from anywhere. We’re building courses for an online environment, as opposed to just saying, ‘Hey, we’ll just meet in Zoom instead, right?’”

Digital capability gives institutions a level of agility and resiliency that is needed not only for business continuity in the pandemic, but also to navigate the range of other challenges facing higher ed.

More digitally mature institutions adapted to the shutdown more readily, and also started with an advantage as they strategized for preventing summer melt, preparing for the potential for online or blended campus experiences in the fall, and marketing and recruitment planning for next year’s class.

The experience of implementing a digital strategy exercised the “muscles” their organization needed in this situation: openness to change, ability to think creatively, shifts in team roles and responsibilities, and a data-driven culture.

About Isurus Market Research and Consulting

Isurus provides strategic market research services to clients in a range of sectors, including K-12 and higher education. The firm uses research-based insights to enable clients to understand markets and buyers, evaluate competitors, size opportunities, configure offerings, and manage their brand and communications.

For more information, contact Jeana McNeil, Vice President, at jmcneil@isurusmrc.com or visit isurusmrc.com.

About WCM

Wallwork Curry McKenna (WCM) is a branding, marketing and advertising firm based in Boston. The company has deep category experience with higher education and Ed tech clients, providing strategic planning and creative content to support their marketing programs.

For more information, contact Alison Costello, President, at acostello@wcm-partners.com or visit wcm-partners.com.

About Decibel Media

Decibel, a subsidiary of WCM, is a media strategy, planning and buying firm with extensive experience helping higher education clients by providing category intelligence and advanced analytics to effectively reach prospective students and their parents.

For more information, contact Tim Davies, President, at tdavies@decibelmedia.com or visit DecibelMedia.com.

Interviews were conducted in June 2020. The marketing and enrollment leaders participating in this research represent perspectives from small private colleges through R1 institutions. Enrollments range from 1,800 to 90,000 students. The individuals hold titles ranging from Chief Marketing Officer and VP of Enrollment Management to Director of Admission. Their backgrounds include higher education veterans, as well as relative newcomers to the industry.

¹ Carlson, Scott and Friga, Paul N. "This Is an Existential Time for Higher Ed": an Interview with Gordon Gee". Chronicle of Higher Education, 30 June 2020.

<https://www.chronicle.com/article/This-Is-an-Existential-Time/248907>