

Volume 1 — June 2020

State of Higher Ed in Media

Building brands through
data-driven marketing
& media planning →



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The world we find ourselves in today.



2020 has proven to be a cultural catalyst for our entire world. COVID has forced industries to meet the demands of a socially-distanced world and dismantle our perceptions of equality and success. **It's actively reshaping the very ways we think about how we work, how we live, and how we learn.**

Amid that evolution, America was again forced to confront its long history of racial inequity that led to the murders of George Floyd, Breonna Taylor, Ahmaud Arbery, and countless others.

The convergence of social, political, economic, and cultural unrest has markedly and permanently shaped all generations, but most significantly altered Gen Z whose foray into adulthood is marked by the incongruence between the world they inherited, and the world they want to create.



How do you capture share of voice of your audiences in today's changing landscape?

Every sophisticated Marcom professional has a data-driven segmentation strategy defined by psychographic personas of their target student populations. These personas are foundational to creating journey maps, which help to inform students' varying needs as they make decisions about where to attend college, which allows the marketer to create content to meet those needs.. But the sheer volume of world change that's happened in the past several months usually takes years, if not decades, to reach.

In other words, these psychographics — their hopes and dreams, motivations and fears, aspirations and insecurities — **have shifted**. In some cases, radically, in most cases permanently, and you need to shift with them.

The challenge that Marcom professionals are facing can't be understated.

Amid the greatest period of uncertainty in our lifetimes, and with greater constraints on your already limited budgets and staffing, and with radically altered psychographics of your target audiences, you're expected to deliver more than ever before, penetrating a saturated marketplace with effective paid media campaigns to help deliver results your institution desperately needs.

And that's where this guide comes into play. The purpose of our **State of Higher Ed in Media Report** is to be in the trenches with our higher ed marcom peers and help them to achieve meaningful results.

For now, we'll publish this guide every month, and with it, bring you the most relevant media trends, insights, and expert guidance to maximize the effectiveness and ROI of every dollar you spend on your paid media. We'll also provide guidance on how to handle conversations with your current media planner and make a case for why you should consider SimpsonScarborough as your strategic media planning partner.



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What You Will Find in This Guide

- 04 Media Trend No. 1
- 05 What It Means for Higher Ed
- 08 Our Recommendations
- 09 The Conversations You Need to Be Having With Your Media Partner
- 10 Why Partner with SimpsonScarborough



Media engagement is shifting significantly as a result of **sweeping environmental and societal upheaval.**

This is causing platforms to react in two ways:

1

To dramatically adjust placement costs and opportunities for advertisers. In response, brands are now pressured to question their positioning, placement, and strategies in reaching their audiences.

2

To remain agile in response to shifting trends by introducing new products and services that meet the demands of the target audiences that want to keep engaged.

What this means for Higher Ed

Gen Z is redefining the media landscape and the ways that they want to be engaged. It's our responsibility to listen and observe what the needs and wants of your target audiences are and distill those insights into actionable plans.

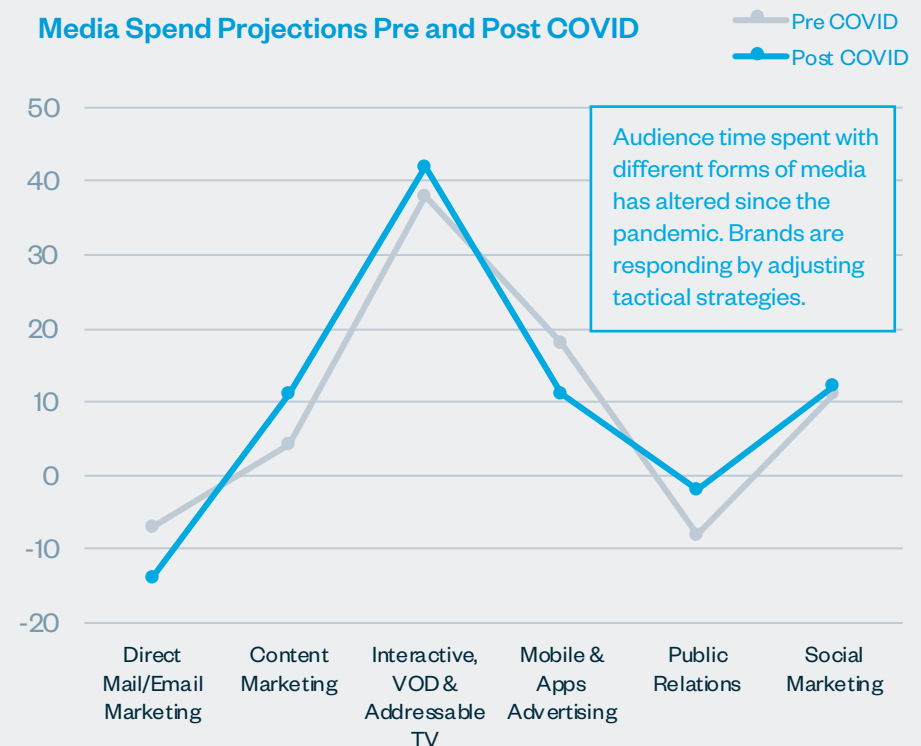
What's especially unique about younger audiences today and their evolving media habits is that digital is the assumed leader in content engagement and conversation, but audiences are challenging the traditional formats for that content and ad dissemination.

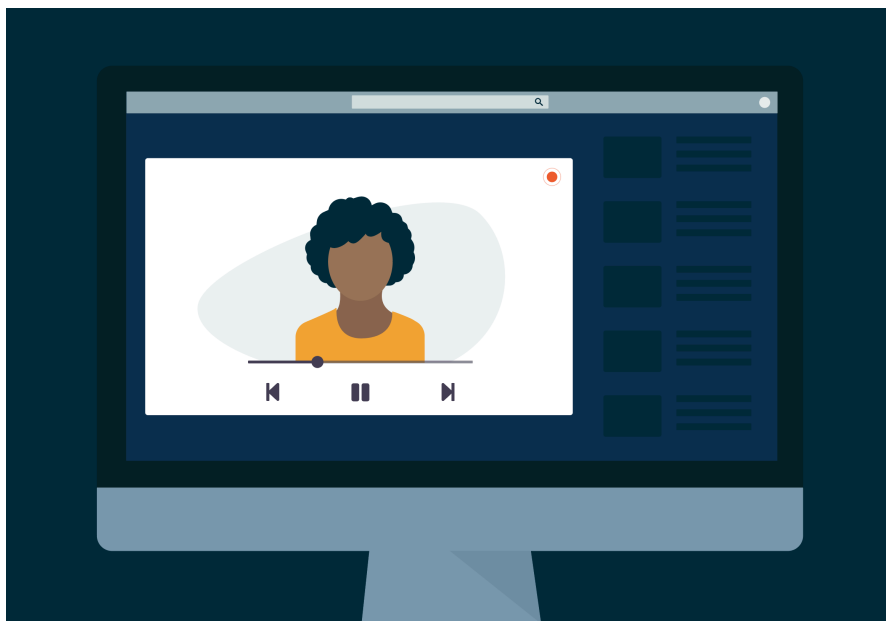


Platforms like social, addressable TV, and content marketing benefit from new audience trends, with projected increases in overall spend of 1%, 6%, and 7.9%, respectively, in 2020.

Changes in media consumption habits are represented well in the annual Myers Report, which estimates overall spend by tactic for advertisers each January. COVID-19 forced a re-forecast of the estimates, with content, social, and addressable TV coming out as winners in the re-forecast, as mentioned above. Some media will suffer, however. Direct mail and email marketing are expected to drop 7.4% and mobile & apps advertising at a loss of 5.9%.

Media Spend Projections Pre and Post COVID





While your current and incoming students invest more time in social media and streaming television, they remain agile in finding creative ways to avoid messaging that they find irrelevant or disruptive through the creation of micro-communities, or ‘dark social’.

Micro-communities are offshoots of social media platforms that allow people to feel safer and engage in more authentic conversations, connecting with people — and sometimes brands — that they believe understand more of who they are, share their values, and accept them for who they truly are.

At their root, these communities nurture quality of conversation and company, rather than quantity. As a result, usage of platforms like Slack, WhatsApp, Snap, and Facebook Messenger are seeing upwards of 40% increases in engagement rates in 2020.

But all is not lost for institutions looking to connect with core audiences on social platforms through ads. Curated content is making its way across these platforms and is shared by trusted audiences when the content remains meaningful. Social micro-communities are tremendous opportunities for brands to gather insight and information to guide ideal placements and messaging for their prospective and current student base.



40%
**Increase in
‘Dark Social’
Engagement**

These shifts in media trends were already occurring; the pandemic simply expedited many user shifts in engagement.

Platforms like ComScore and Kantar measured double-digit growth in in-home media consumption YoY in early 2020. Still, April and May far surpassed initial estimates, with ComScore reporting a 33% increase in in-home data usage during the first ten days of May alone.

What these numbers tell us is that your audiences are demanding quality information and connections. These trusted niche audiences are hotbeds of opportunity for institutions if nurtured appropriately.

The critical takeaway from this deeper understanding of audience needs is that overall time spent with media across all audiences has increased tenfold since March 2020, delivering a ripe but challenging landscape for institutions looking to keep admitted and current students engaged.

New media patterns are representative of the types of experiences this generation is looking for, so media consumption patterns are a telling sign of the next steps for institutions to take.

How are your core audiences interacting with you online, and are you reaching them in the right ways?



Strategic media placement and channel review are critical in this environment. Marcom leaders need to understand **where their brand is showing up** and **how to strengthen that exposure** in today's landscape.

A prime and timely example is the recent show of brands' participation in **#BlackoutTuesday**, an opportunity for brands to stand against racism by posting no other content for the day. The conversations sparked around systemic racism, emotional health & well-being, and the future of our environment are heavily led by younger audiences and a critical touchpoint for institutions to solidify their mission and values in the minds of core targets.

Are you following these messaging and platform patterns to respond in kind and develop short and long-term strategies?

Most importantly, as mentioned above, once you have a good grasp of consumer patterns, attitudes, and attributes, it's time to put a magnifying

glass on how your mission and values are translating in your media and marketing. It's table stakes to your younger audiences that an institution's values and mission align with their own.

But are you displaying how you're living up to those values?

An audit of your current owned and paid channels is a crucial first step to understand how you can elevate existing strategies or scrap them entirely and introduce new ones to test. Time is of the essence; if you're looking to minimize melt and maximize yield for the Fall 2020 semester, **now is the time to take action.**

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Are you following messaging and platform patterns to respond in kind and develop short and long-term strategies?

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Can you display how you're living up to the mission and values of your brand?

The conversations you need to be having with your media partner.

There's never been a more important time to work with a media planner with deep expertise in higher education.

Here are some thought starters on the questions to be asking your media planning and marketing partners.



Questions for Consideration:

- How are consumer attitudes and habits shifting; what will the impact to my future campaigns be?
- How are list providers responding to the loss of data?
- How are major tech players like Facebook, Google, and Snap responding to shifting behaviors; what are new ad or engagement opportunities for my team to review?
- How should we evolve our owned assets (e.g., site architecture, comms strategy, etc.) to best support the user experience/consumer journey?
- How are others in the industry responding to these new patterns and trends? (Leverage your agency's relationships and research subscriptions here.)
- What's the recommended approach to altering digital presence to best support new audience patterns? What's currently in my digital suite?
- How can we change the way we communicate with parents and guidance counselors?
- How can we better leverage our organic and paid social media to drive awareness and engagement?
- What is the virtual experience that I can create that will mitigate the loss of face to face recruitment strategies and meetings in Summer and Fall 2020?

How SimpsonScarborough can partner with you on your integrated media and marketing strategies.

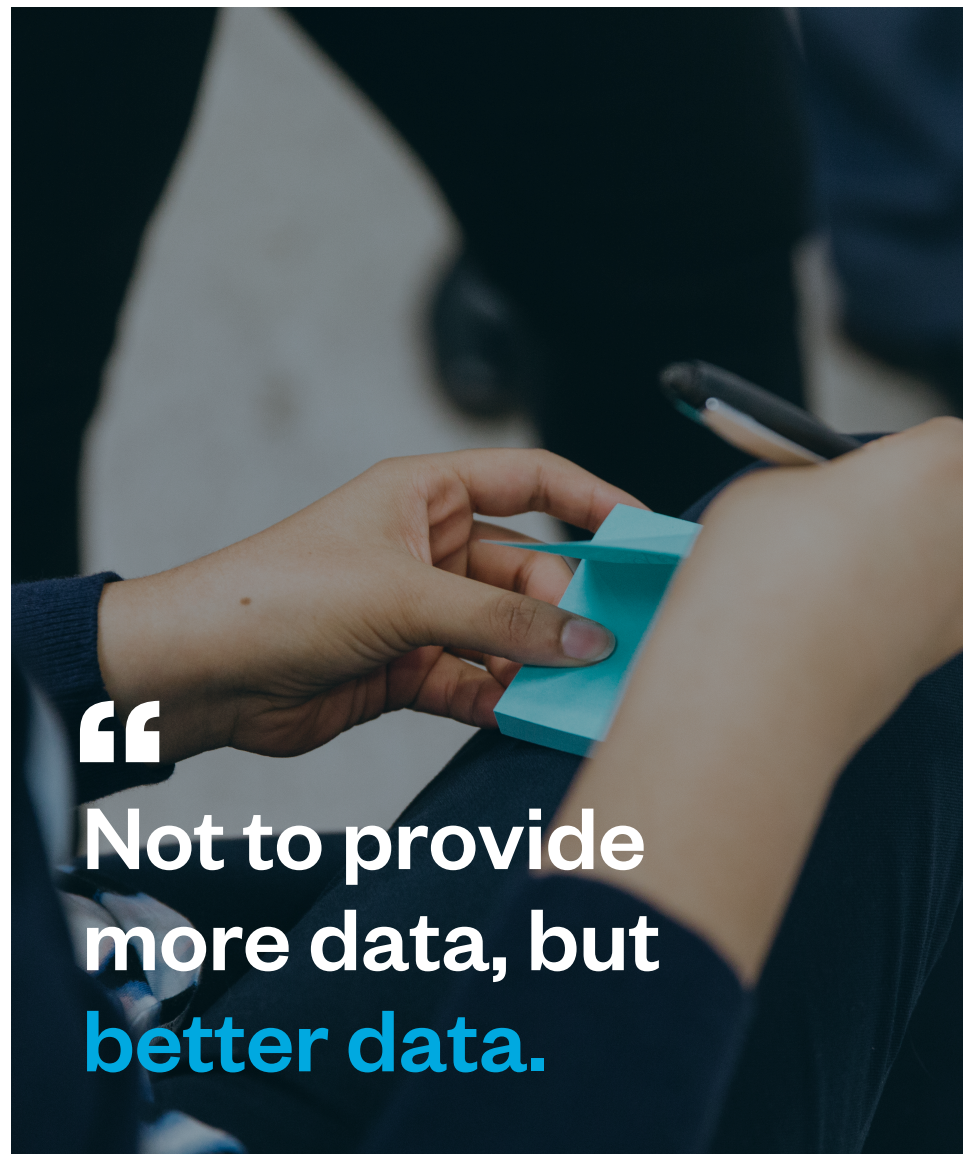
While we've long been known as the leader in data-driven marketing, our focus is not to provide our clients with more data, but better data.

We leverage our deep industry expertise along with careful analysis of media trends to provide actionable recommendations on your campaign metrics to deliver best-in-class results.

There's a resource drain when you work with multiple partners to assist in your enrollment management and marketing & communications. Instead of driving strategic direction to accomplish your institution's pressing goals, this multi-vendor management usually requires a significant amount of project management.

Partnering with SimpsonScarborough changes that. As a full-service integrated agency & data-driven partner to more than 300 colleges and universities, we know higher ed and can help you navigate this time of uncertainty. Instead of juggling multiple vendors, engage one partner who understands the industry, and has the experience and capability to bring your strategic vision to life.

We remain agile in an ever-changing marketplace, providing our partners quick input and perspective on how to shift their marketing strategies depending on the landscape.



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About SimpsonScarborough

We started SimpsonScarborough in 2006 with the steadfast belief that the best higher education brands are built, measured, refined, and expressed through research — **and it remains our founding principle.**

But, like any good marketing strategy, we're adaptive. Over the years, our mission has become less focused on what we do and more responsive to what our clients need.

In 2014, we started building out our creative and digital teams to expand our capabilities and allow us to better help clients meet their goals through targeted marketing initiatives. In 2019, SimpsonScarborough acquired Knowble Media, an accomplished digital agency specializing in website and video production for higher education.

But 2020 has demanded that we forge deeper partnerships than ever before. With greater constraints on your limited resources, we're here to help you forge the future of your institution by guiding your media planning and marketing strategies. As a full-service integrated agency, we have the experience and capability to help you every step of the way.

Media Planning Division

Sara Wallace leads our media planning division, supporting clients on effective, measurable media & marketing strategies. She holds a Bachelor's in Political Science from Hobart and William Smith Colleges, and a Master's in History and Communications from the State University of New York College at Oswego.

Sara has presented at several marketing and social media conferences and was an adjunct instructor at the School of Business at SUNY Oswego, where she taught social media marketing as well as strategic communications in business.



Let's Connect

Before your next initiative, let's see how we can help.

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