The 2021–22 CMO Study

State of Higher Ed Marketing

Simpson Scarborough

This is our fourth volume of the State of Higher Education Marketing CMO Study. Our first CMO Study was published in 2014 when we were still asking whether or not lead marketers even used the words 'marketing' and 'branding' on their campuses. (Turns out, in true marketer form, it depended on their audience.)

In many respects, the industry has made significant strides since that first study. In other areas, we still have a long way to go. As our findings show, we've made real progress in advocating for the role of the CMO in higher ed and the strategic inclusion of marketing as institutional strategy—but marketing departments continue to be under-resourced and over-extended. And integration across campus, whether strategically, organizationally, or technologically is slow.

One of the new changes this year is how we've presented secondary data. Previously, we focused on presenting the data by Carnegie Classification, and we still have, but in an effort to provide the most actionable insights, we've included additional secondary by enrollment size and tuition dependency where the data is significant to help uncover the core issues.

A final note — the efficacy and utility of these data depend on significant response rates, yet the sample size of our surveys haven't grown since our original study in 2014. We hope to count on your support in ensuring we gather the data needed to truly derive meaningful insights the next time we go into the field.

When Christopher Simpson and I originally founded SimpsonScarborough back in 2006, we did so with a vision to provide higher ed marketers answers to their most pressing questions. We aimed to provide data that would not only inform their strategies but empower their entire departments to be seen as strategic partners instead of the glorified print shops many had become.

We advocated for the role of CMO, lobbied for its inclusion in the President's cabinet, and fought to allocate the resources and organizational structure necessary to succeed. In many respects, our bi-annual CMO Study is the most tangible expression of that original vision—it is a tool meant to be used to inform, inspire, and make your case to secure the resources you need to create a lasting impact.

Now more than 16 years later, SimpsonScarborough is a full-service agency and strategic partner to the most dedicated professionals anywhere. But our vision hasn't changed: we are here to advance our nation's colleges and universities by building brands that inspire, endure and elevate the role and mission of higher ed.

Never has there been a more critical time for the advancement of our industry. Never has there been a more important cause than to dispel the misconceptions underpinning the belief that higher education is no longer a public good. The long-term success of our country depends on our nation's colleges and universities, and we must work holistically, strategically, and collaboratively to rebrand higher education in the heart of this country.

We hope you will reach out with any questions or insights — we're here for the conversation.

Elizabeth Johnson
Chairman & Founding Partner

Profile of Respondents

- 230 respondents

- All respondents work for a 4-year, nonprofit institution in the United States.

- All respondents are senior officers who oversee marketing and communications and work within a central marketing/communications office.

- Only one respondent per institution was used in our survey. In instances where multiple officials responded from the same institution, we used only the most senior official.

Is your institution:

Public	37%
Private	63%

Undergraduate Offering

Undergraduate degree or certificate offering	99%
No undergraduate offering	1%

Graduate Offering

Graduate degree or certificate offering	88%
No graduate offering	12%

Total Enrollment

<3k	30%
3k–12k	36%
>12k	34%

Carnegie Classification

Baccalaureate	22%
Masters	33%
Doctoral/Research	40%
Special Focus	5%

Region

New England (CT, ME, MA, NH, RI, VT)	6%
Mid East (DE, DC, MD, NJ, NY, PA)	22%
Great Lakes (IL, IN, MI, OH, WI)	22%
Plains (IA, KS, MN, MO, NE, ND, SD)	11%
Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, VA, WV)	16%
Southwest (AZ, NM, OK, TX)	8%
Rocky Mountains (CO, ID, MT, UT, WY)	4%
Far West (AK, CA, HI, NV, OR, WA)	10%

Marketing's Role in Higher Education Leadership

Lead Marketers (finally) have a seat at the leadership table.

After years of stagnant growth, 72% of Lead Marketers reported being a part of their President's cabinet. In our three previous CMO Studies, that number had stagnated at just over half.

Not surprisingly, Lead Marketers who sit on their President's cabinet report being significantly more involved in a myriad of strategic discussions, most notably for issues relating to the financial performance of the institution.

Additionally, Lead Marketers are reporting more senior-level titles with the greatest growth coming from Chief Marketing / Chief Communications (CMO/CCO) Officers and VP/VC level titles, increasing by 45% and 48% respectively since 2019-20. Director-level titles as the senior-most marketing professional experienced the greatest declines, down 35% since 2019-20.

For the first time, more than half of all Lead Marketers report having either a CMO or VP title (56%, up from 38% in 2019-20). While the most substantive gains in salary growth were experienced by those with a CMO title, both VPs and CMOs report average salaries of more than $200,000.

Lead Marketer as a Cabinet Position

60%

are members of leadership team
AND report to President

Are you a member of the President's cabinet/executive leadership team (or equivalent)?

	Bacc.	Masters	Doctoral
Yes	78%	65%	76%
No	22%	35%	24%

Do you report directly to the President/Chancellor of your institution?

	Bacc.	Masters	Doctoral
Yes	73%	53%	66%
No	27%	47%	34%

Lead Marketer as a Cabinet Position

Do you report directly to the President/Chancellor of your institution? / Are you a member of your President's cabinet/executive leadership team (or the equivalent)?

■ Report to President   ■ Cabinet Position

	2014	2016	2019	2021
Cabinet Position	9%	9%	8%	10%
Report to President	49%	44%	48%	63%
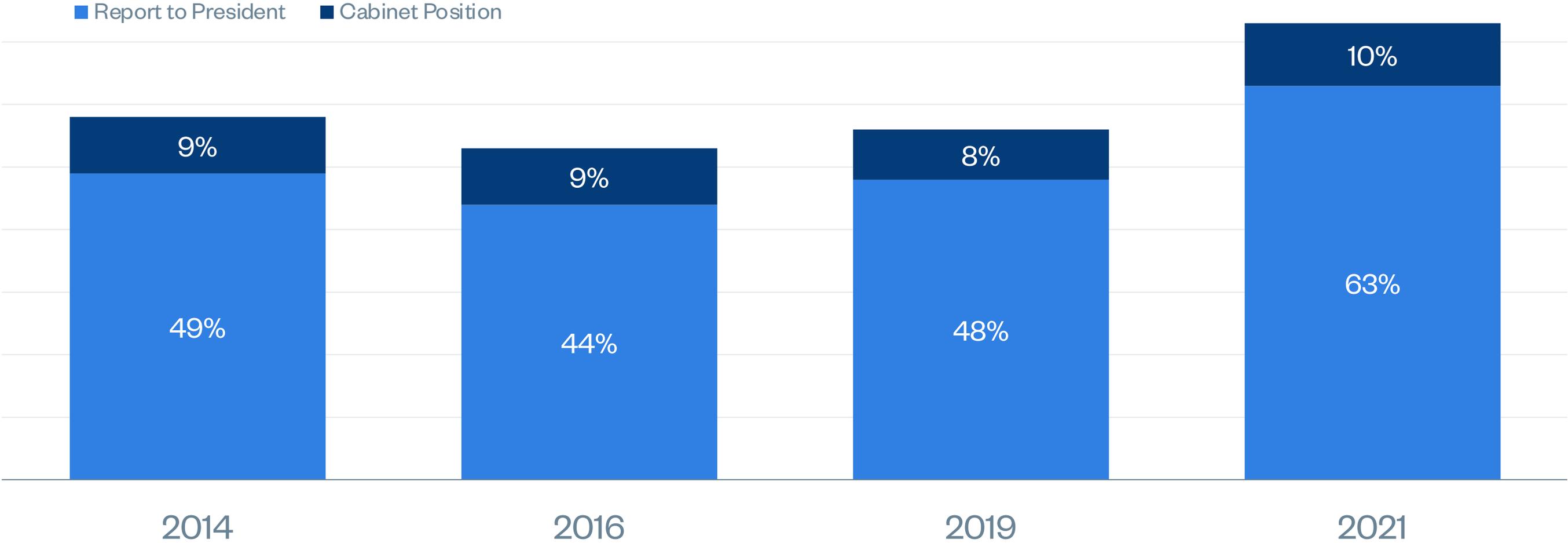
Lead Marketer Title

Lead Marketer Title

CMO/CCO	16%
VP/VC/SVP/SVC	40%
AVP/AVC	17%
Director	26%
Other	1%

Title Changes	2019-20	2021-22	Growth (Decline)
CMO	11%	16%	**+ 45%**
VP	27%	40%	**+ 48%**
AVP	21%	17%	**− 19%**
Director	40%	26%	**− 35%**

Lead Marketer Salary

Salary by Title

	Mean	Median	Minimum	Maximum
CMO	$217,271	$200,000	$68,600	$450,000
VP	$ 207,805	$190,000	$91,000	$420,000
AVP	$ 145,306	$135,000	$85,800	$250,000
Director	$ 92,427	$94,000	$49,000	$160,000

Average Salary Change

	2019-20	2021-22	Total Growth	Annual Growth Rate
CMO	$166,875	$217,271	30.2%	14.1%
VP	$201,825	$207,805	3.0%	1.5%
AVP	$136,846	$145,306	6.2%	3.0%
Director	$87,097	$92,427	6.1%	3.0%

KEY INSIGHT

Lead Marketers are not only reporting more senior titles compared to 2019 but increases to their annual salaries as well — especially those with a CMO title.

Since our most recent CMO Study was from fiscal year 2019-20, we wanted to assess both cumulative salary growth as well as understand the annual rate of growth.

CMOs experienced the most substantive gains and edged slightly above VPs for the highest overall compensation, though they only comprise 16% of all respondents.

Conversely, salary increases for the vast majority (83%) of respondents — those with a VP, AVP, or Director title — averaged only modest annual gains of 1.5%-3%.

Lead Marketer Strategic Involvement

As the lead marketer at my institution, I am involved in discussions regarding _____. (Select all that apply)

	FY 2019-20	FY 2021-22	Improvement
Marketing of Individual Schools	91%	89%	-
Recruitment Strategy	86%	84%	-
DEI	**63%**	**82%**	**30%**
Student Experience	63%	73%	16%
Employee Morale	**56%**	**72%**	**29%**
Retention	48%	58%	21%
Fundraising Strategy	53%	53%	-
Program & Product Development	51%	50%	-
Alumni Relations Strategy	55%	49%	-
Athletics Marketing	44%	46%	-
Board Management	**35%**	**46%**	**31%**
Pricing & Tuition Strategy	35%	39%	11%

Note: All declines and omissions are within the margin of error and statistically irrelevant

What's the real impact of including the Lead Marketer in the <u>President's Cabinet?</u>

Lead Marketers holding a cabinet-level position report having significantly more involvement in strategic discussions compared to Lead Marketers who are not on their president's cabinet.

Financial Performance

→ Pricing **132%**

→ Fundraising **52%**

→ Retention **48%**

→ Program/Product Development **33%**

→ Recruitment Strategy **17%**

Qualitative Performance

→ Employee Morale **76%**

→ DEI **42%**

What's the real impact of including the Lead Marketer in the <u>President's Cabinet?</u>

Further, Lead Marketers holding a cabinet-level position report:

→ 41% more likely to have **conducted brand research** in the past three years

→ Nearly twice as likely to report having **measures in place to track brand strength**

→ 78% larger budget toward **staff salaries & benefits**

→ 27% larger **'true' marcom budget**

→ 68% **higher salary**

What's the real impact of including the Lead Marketer in the <u>President's Cabinet?</u>

For marketing to evolve from a cost center to a revenue driver, Lead Marketers need to be involved in the strategic discussions that support the financial performance of the institution.

Given the declines in auxiliary revenues and the enrollment volatilities of the past two years, the inclusion of the Lead Marketer in conversations such as pricing, fundraising strategy, and retention strategy are crucial to ensuring that an institution's marketing strategy is advancing its revenue growth initiatives.

Lead Marketers holding a cabinet position report having significantly more involvement in these discussions compared to their colleagues without a cabinet seat. This is a key opportunity for Lead Marketers to champion the importance of institutional brand strength, the necessity of cross-campus data strategies, and the net impact of marketing's performance on achieving institutional goals.

Strategic Planning & Priorities

Brand strategy continues to be a top responsibility, but brand performance is infrequently measured.

99% of Lead Marketers report being responsible for brand strategy, but only half report having measures in place to track brand strength over time.

Only 1 in 5 report using brand lift surveys to assess marketing performance and brand perceptions.

Enrollment volatilities are pervasive as nearly the identical number of Lead Marketers report undergrad enrollment increases (43%) as decreases (39%).

More than half (54%) report increases in annual fund giving versus just 15% who report it has declined.

Central MarCom Responsibilities

Content strategy	99%	**Social media**	96%
Brand strategy	99%	**Crisis communications**	91%
Digital strategy	98%	**College/university news**	90%
Institutional advertising	98%	**Media relations**	90%
Institutional web strategy	97%	**Internal communications**	84%
Creative services	96%		

Our institution has...

We have measures in place to track our institution's brand strength over time.
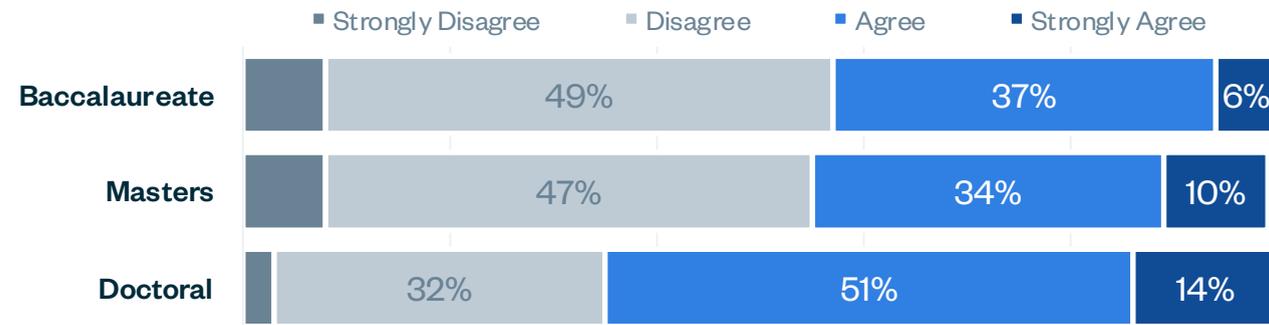
- ■ Strongly Disagree
- ■ Disagree
- ■ Agree
- ■ Strongly Agree

	Strongly Disagree	Disagree	Agree	Strongly Agree
Baccalaureate		49%	37%	6%
Masters		47%	34%	10%
Doctoral		32%	51%	14%

We have measures in place to track our institution's brand strength over time.

- ■ Strongly Disagree
- ■ Disagree
- ■ Agree
- ■ Strongly Agree

	Strongly Disagree	Disagree	Agree	Strongly Agree
<3k		55%	31%	
3k-12k		40%	40%	13%
>12k		32%	51%	14%

Our marketing efforts are integrated across units including undergraduate recruiting, graduate recruiting, retention, fundraising, and alumni affairs.

	Strongly Disagree	Disagree	Agree	Strongly Agree
Baccalaureate		16%	55%	20%
Masters		22%	57%	15%
Doctoral		28%	48%	18%

Our marketing efforts are integrated across units including undergraduate recruiting, graduate recruiting, retention, fundraising, and alumni affairs.

|	Strongly Disagree	Disagree	Agree	Strongly Agree
<3k		12%	60%	18%
3k-12k		23%	55%	17%
>12k		32%	44%	19%
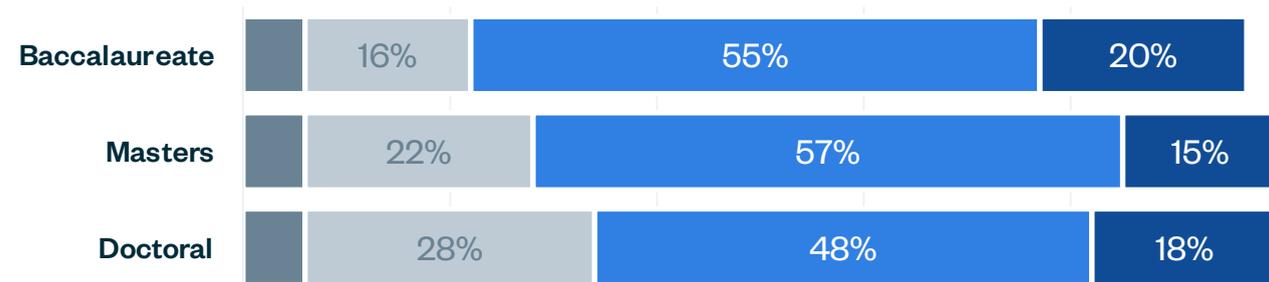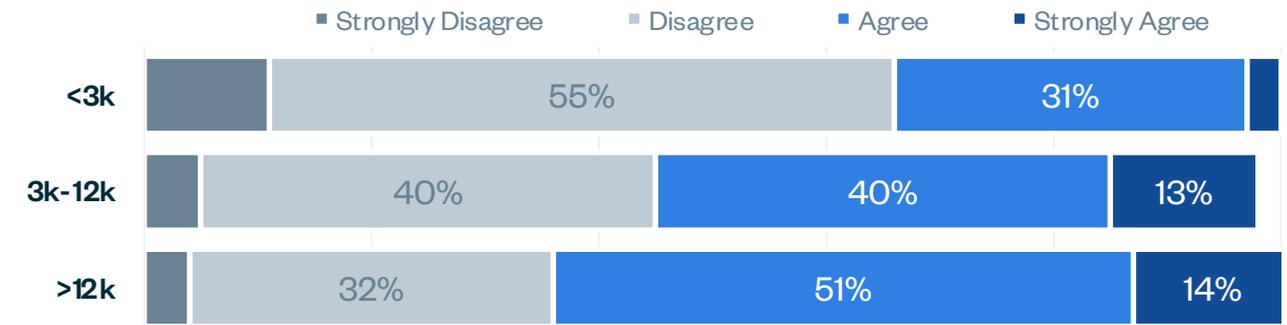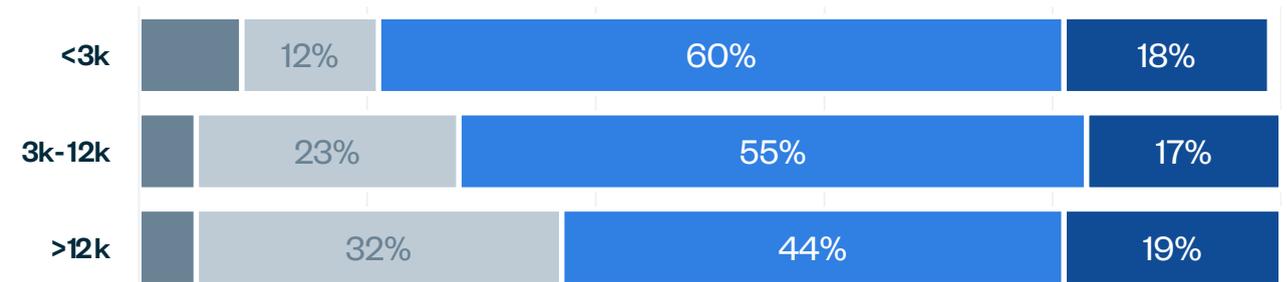
Our institution has...

Our marketing efforts are integrated across units including undergraduate recruiting, graduate recruiting, retention, fundraising, and alumni affairs.

■ Strongly Disagree ■ Disagree ■ Agree ■ Strongly Agree

Agree and Strongly Agree

Year	Strongly Disagree	Disagree	Agree	Strongly Agree
2019	5%	24%	49%	22%
2021	7%	22%	53%	17%

71%

70%

We have measures in place to track our institution's brand strength over time.

Year	Strongly Disagree	Disagree	Agree	Strongly Agree
2019	7%	43%	39%	11%
2021	7%	41%	41%	10%
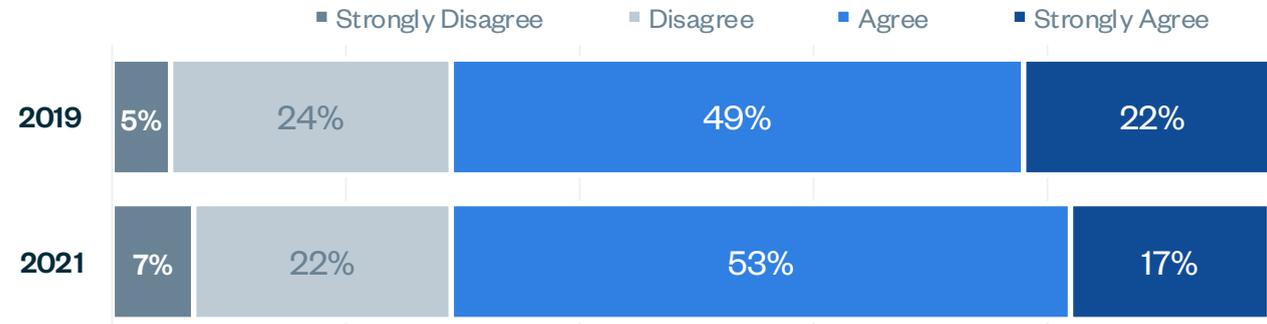
50%

51%

KEY INSIGHT

The notable takeaway about cross-campus collaboration is that — well, there is no notable takeaway.

Despite all the stories about marcom teams being highly integrated and working collaboratively across campus as a result of the pandemic, there has been little growth realized in integrating marketing efforts across an institution.

Moreover, while 99% of Lead Marketers report being responsible for brand strategy, only 51% report having measures in place to track brand strength over time; nearly identical to our findings from 2019-20.

Our institution has...

	Yes	No	Don't know
Visual identity guidelines	98%	2%	0%
Brand guidelines	95%	5%	0%
A written/documented brand strategy	76%	24%	0%
Regular report of overall marketing performance to institutional leadership (at least annually)	68%	32%	0%
Cross-divisional marketing team or task force that meets regularly	63%	37%	0%
Brand research conducted in the last three years	62%	37%	1%
Regular reporting of digital analytics to leadership (at least quarterly)	57%	42%	1%
A reporting system or consolidated analytics dashboard	39%	61%	1%

Major Differences: % Yes 2019 vs 2021	2019	2021	Net Change
Brand research conducted in the last three years	73%	62%	– 17%
Regular reporting of digital analytics to leadership (at least quarterly)	64%	57%	– 12%

Our institution has...

	Baccalaureate	Masters	Doctoral
Brand research conducted in the last three years	52%	58%	70%
Regular reporting of digital analytics to leadership (at least quarterly)	45%	68%	55%
Cross-divisional marketing team or task force that meets regularly	53%	57%	78%

Does your college/university have?
— Brand research conducted in the last three years

Total Enrollment	<3k	3k-12k	>12k
Yes	47%	68%	66%

— Cross-divisional marketing team or task force that meets regularly

	<3k	3k-12k	>12k
Yes	45%	67%	78%

Enrollment & Giving

How have each of the following changed
in the last year at your institution?

Legend: ■ Increased ■ Decreased ■ Stayed the Same ▪ Don't Know ■ Does Not Apply

Undergraduate enrollment: 43% | 39% | 18%

Graduate enrollment: 45% | 18% | 21% | 14%

Annual fund giving: 54% | 15% | 21% | 10%

Alumni engagement: 38% | 12% | 28% | 20%
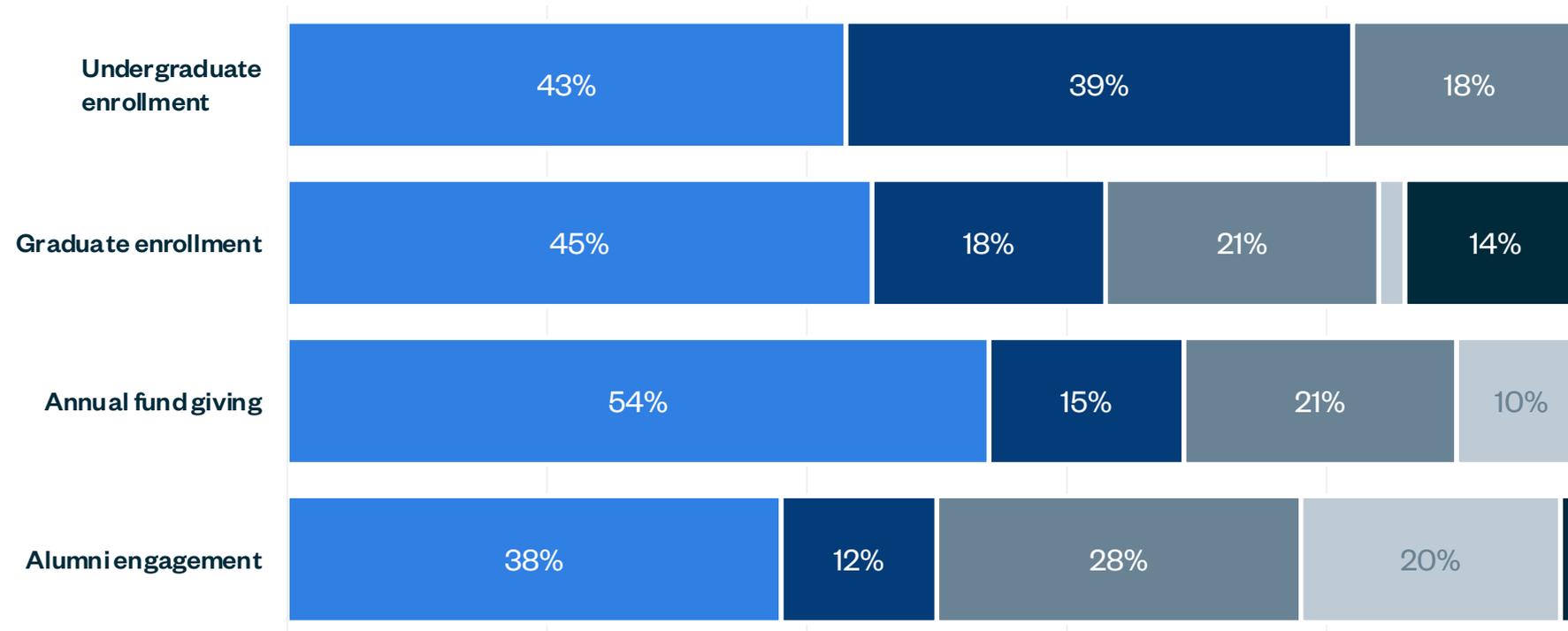
% Reported Increased in 2019 vs 2021	2019	2021
Undergraduate enrollment	38%	43%
Graduate enrollment	35%	45%
Annual fund giving	56%	54%
Alumni engagement	37%	38%

Enrollment & Giving

How have each of the following changed
in the last year at your institution?
— Undergraduate enrollment

— Graduate enrollment

Tuition Dependency	0-33%	34%-66%	67% or more
Increased	55%	41%	38%
Decreased	26%	40%	44%
Stayed the same	19%	19%	16%
Don't know	0%	0%	1%
Does not apply	0%	0%	1%

	0-33%	34%-66%	67% or more
Increased	57%	46%	37%
Decreased	11%	14%	26%
Stayed the same	21%	19%	25%
Don't know	2%	0%	3%
Does not apply	9%	20%	9%

KEY INSIGHT

Lead Marketers at low tuition dependent institutions are 115% more likely to report undergraduate enrollment increases and more than 4x as likely to report graduate enrollment increases than enrollment declines.

Conversely, Lead Marketers at highly tuition dependent institutions are 14% more likely to report an undergraduate enrollment decrease and only 33% more likely to report a graduate program increase.

Tools & Data Sources

Google Analytics	95%	**Google AdWords**	56%
Native Social Media Platforms (e.g., Instagram, Twitter, Snapchat, etc.)	73%	**Social Listening Software (e.g., RivalIQ, STREAM, Sprout Social, etc.)**	46%
CRM (e.g., Slate, Salesforce, HubSpot, etc.)	70%	**Paid Media Metrics**	46%
PR/Earned Media Software (e.g., Cision, Meltwater, Brandwatch, etc.)	66%	**SEO Platform (e.g., Moz, SEMRush, etc.)**	28%
Email Platform (e.g., Mail Chimp, Constant Contact, etc.)	65%	**Brand Lift / Recall Surveys**	20%
CMS (e.g., WordPress, Drupal, etc.)	63%	**Other**	8%
Social Media Management Tools (e.g., Hootsuite, Buffer, etc.)	62%		

Tools & Data Sources

Which of the following tools/data sources do you use to evaluate marketing performance and institutional brand perceptions? (select all that apply)

By Enrollment

	<3k	3k-12k	>12k
Brand Lift / Recall Surveys	10%	15%	35%
Paid Media Metrics	38%	40%	57%
PR/Earned Media Software (e.g., Cision, Meltwater, Brandwatch, etc.)	58%	63%	75%
Social Listening Software (e.g., RivalIQ, STREAM, Sprout Social, etc.)	25%	50%	61%

By Tuition Dependency

	0-33%	34%-66%	67% or more
Brand Lift / Recall Surveys	28%	23%	13%
CRM (e.g., Slate, Salesforce, HubSpot, etc.)	51%	70%	79%
PR/Earned Media Software (e.g., Cision, Meltwater, Brandwatch, etc.)	79%	61%	63%

Assessing Performance / CMO & President

Which of the following do you personally or the President/Chancellor of your institution use MOST frequently in your role to gauge the success/impact of your department? (mark all that apply)

	CMO	President
Number of students enrolling	82%	76%
Web analytics (traffic, time on site, etc.)	82%	14%
Social media engagement	74%	20%
Amount/quality of media placements/coverage	61%	48%
Yield rate from applicant pool	53%	38%
Periodic measurements of brand awareness/strength	50%	24%
Anecdotal opinions of reputation	40%	57%
Improvements in rankings	35%	40%
Quality of students enrolling	32%	31%
Fundraising productivity	32%	40%
Alumni engagement (participation in events, etc.)	25%	22%

KEY INSIGHT

One of the more telling comparisons is in how Lead Marketers assess their own department's performance versus how they perceive their President to assess their department's performance.

Beyond digital metrics where a wide chasm has long existed, Lead Marketers report greater emphasis on periodic measures of brand strength, yield rate, and media placements.

Conversely, Presidents are believed to prioritize anecdotal opinions of reputation, fundraising productivity, and rankings.

Assessing Performance / CMO Only

Which of the following do you personally use MOST frequently in your role to gauge the success/impact of your department? (mark all that apply)

Number of students enrolling	82%
Web analytics (traffic, time on site, etc.)	82%
Social media engagement	74%
Amount/quality of media placements/coverage	61%
Yield rate from applicant pool	53%
Periodic measurements of brand awareness/strength	50%
Anecdotal opinions of reputation	40%
Improvements in rankings	35%
Quality of students enrolling	32%
Fundraising productivity	32%
Alumni engagement (participation in events, etc.)	25%

Total Enrollment	<3k	3k-12k	>12k
Number of students enrolling	89%	82%	75%
Fundraising productivity	42%	31%	25%
Improvements in rankings	25%	37%	43%
Amount/quality of media placements/coverage	51%	67%	61%
Periodic measurements of brand awareness/strength	30%	54%	67%

	Private	Public
Fundraising productivity	37%	24%
Alumni engagement (participation in events, etc.)	29%	17%
Periodic measurements of brand awareness/strength	45%	60%

Tuition Dependency	0-33%	34%-66%	67% or more
Number of students enrolling	68%	88%	82%

Assessing Performance / President Only

Which of the following are used MOST frequently by the President/Chancellor of your institution to gauge the success/impact of your department? (mark all that apply)

Alumni engagement (participation in events, etc.)	22%
Amount/quality of media placements/coverage	48%
Anecdotal opinions of reputation	57%
Fundraising productivity	40%
Improvements in rankings	40%
Number of students enrolling	76%
Periodic measurements of brand awareness/strength	24%
Quality of students enrolling	31%
Social media engagement	20%
Web analytics (traffic, time on site, etc.)	14%
Yield rate from applicant pool	38%

Total Enrollment	<3k	3k-12k	>12k
Number of students enrolling	81%	80%	66%
Periodic measurements of brand awareness/strength	14%	23%	33%

	2019	2021
Periodic measurements of brand awareness/strength	32%	24%
Social media engagement	49%	20%
Web analytics (traffic, time on site, etc.)	44%	14%

How does higher ed marcom evolve from a cost-center to a <u>revenue-driver</u>?

Last fall, SimpsonScarborough conducted a research study on the state of higher ed website and marketing technology. One of our key findings was there is no prototypical profile of a sophisticated marcom department. Instead, we found that with the right leadership, digital acumen, marketing acuity, and resources, any institution can raise their level of organizational maturity and achieve success.

In that report, we underscored the inextricable relationship between marketing sophistication and resourcing. More resources in and of themselves cannot overcome a lack of organizational and leadership sophistication. Nor can the most sophisticated leadership achieve success absent of meaningful resources. You must have both to succeed.

While this study exposes patterns and correlations throughout the industry, we're left with a similar conclusion. What does higher ed marketing need to truly advance? Or, put more pragmatically: How can higher ed marcom evolve from a cost-center to a revenue-driver?

The answer is transformational leadership. Higher education needs more transformational leaders at the helm of marketing communications in order to differentiate their institutions, achieve strategic goals, drive quantifiable performance, and advance the industry as a whole.

How does higher ed marcom evolve from a cost-center to a <u>revenue-driver</u>?

The answer is transformational leadership. Higher education needs more transformational leaders at the helm of marketing communications in order to differentiate their institutions, achieve strategic goals, drive quantifiable performance, and advance the industry as a whole.

The Higher Education CMO of the future:

→ **Is adequately resourced,** both financially and in staffing, and has budget authority over all marketing expenditures.

→ Understands the adverse conditions facing higher education and **advocates for the industry holistically**.

→ Is a **cabinet-level position** strategically aligned across the institution to help achieve its most critical goals.

→ Leads a **performance-focused brand** that leverages differentiation to drive growth (rather than focusing on storytelling and promotion).

→ Possesses a **high degree of digital acumen** in order to lead an agile, data-driven, and mature marketing organization.

MarCom Budgets & Budget Breakouts

Budget constraints persist, but some institution types are struggling more than others.

More than 3 in 4 Lead Marketers report not having the budget necessary to meet the expectations of leadership, though budget totals have increased in the past two years.

Baccalaureate institutions report the highest average budgets per enrolled student at $721, compared to Masters at $453 and Doctoral at $336. Yet, Masters institutions report the highest marcom budget as a percentage of institutional budget at 2.02%.

MarTech investment, a critical area amidst budget and staffing constraints, accounts for just 3% of marketing budgets.

The number of Lead Marketers reporting they "didn't know" their own marketing budget nearly cut in half compared to 2019-20. This may be an indicator of greater budget authority, possibly as a result of an increase in senior-level titles.

Central MarCom Budget

What is your central marketing & communications budget, including staff & operating expenses?

Baccalaureate

MEAN

$1,441,977

MAX
$3.5m

MEDIAN
$1.1m

MIN
$350k

Masters

MEAN

$1,978,054

MAX
$24m

MEDIAN
$1,456,673

MIN
$300k

Doctoral

MEAN

$5,829,884

MAX
$50m

MEDIAN
$3.9m

MIN
$488k

Adequacy of Resources

" Our marketing department has the budget needed to meet the expectations of leadership."

Strongly Disagree ▪ **Disagree** ▪ **Agree** ▪ **Strongly Agree** ▪ **Don't Know**

Disagree and Strongly Disagree

	Strongly Disagree	Disagree	Agree
Baccalaureate	29%	54%	17%
Masters	22%	59%	18%
Doctoral	20%	48%	28%

83%

81%

68%

2019

Strongly Disagree

37%

Disagree

42%

2021

Strongly Disagree

24%

Disagree

51%
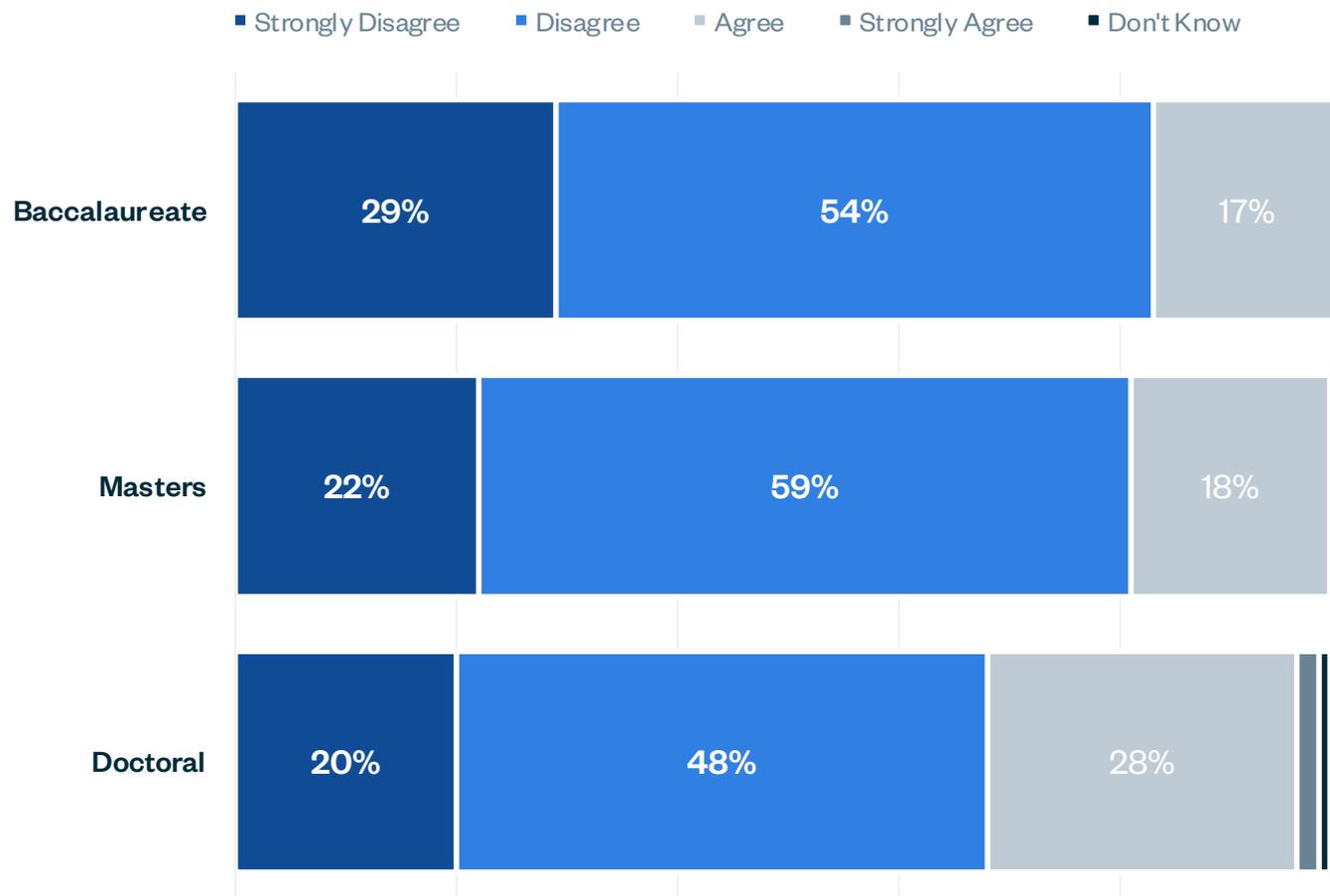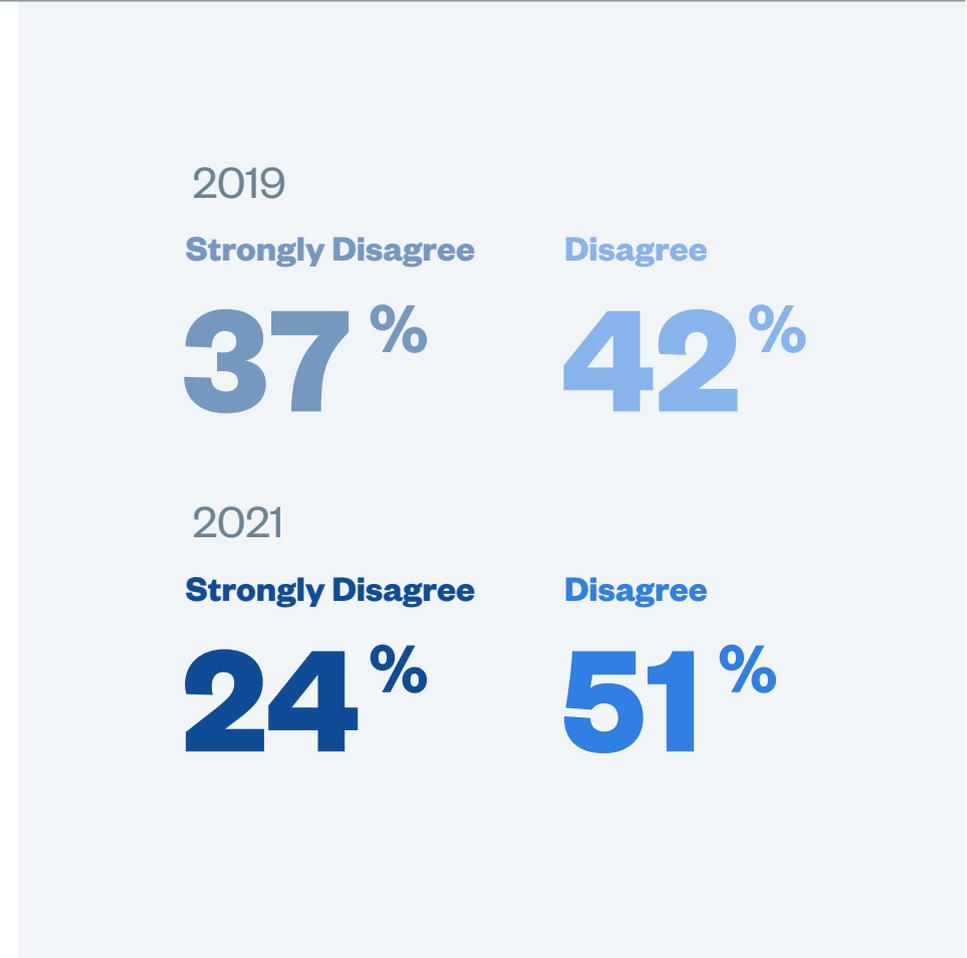
Changes in MarCom Budgets

What is your central marketing & communications budget, including staff & operating expenses?

Baccalaureate

	2019-20	2021-22	Net Change
Mean	$1,139,868	$1,441,977	+ 27%
Median	$1,000,000	$1,100,000	+ 10%
Don't Know	20%	10%	− 50%

Masters

	2019-20	2021-22	Net Change
Mean	$1,730,611	$1,978,054	+ 14%
Median	$1,600,000	$1,456,673	− 9%
Don't Know	21%	16%	− 24%

Doctoral

	2019-20	2021-22	Net Change
Mean	$3,430,156	$5,829,884	+ 70%
Median	$2,500,000	$3,900,000	+ 56%
Don't Know	15%	4%	− 73%

Central MarCom Budget by Institutional Enrollment

What is your central marketing & communications budget, including staff & operating expenses?

<3k

MEAN

$1,173,309

MAX
$3.5m

MEDIAN
$1.0m

MIN
$250k

3k – 12k

MEAN

$2,984,007

MAX
$24m

MEDIAN
$1,976,500

MIN
$321k

>12k

MEAN

$5,226,498

MAX
$38m

MEDIAN
$3.74m

MIN
$700k

Central MarCom Budget

Central marketing & communications budget, including staff & operating expenses

|	Less Tuition Dependent (0-33%)	Moderately Tuition Dependent (34-66%)	Heavily Tuition Dependent (67%+)
Mean	$4,539,929	$3,230,728	$2,630,899
Median	$2,750,000	$1,800,000	$ 2,000,000
Min	$435,000	$350,000	$ 250,000
Max	$38,000,000	$24,000,000	$12,000,000
Public	94%	42%	1%
Private	6%	58%	99%

KEY INSIGHT

New to our study this year is breaking out the data by tuition dependency. IPEDS produces this category by calculating tuition revenue as a percent of the total operating budget.

For the purposes of this study, we've broken them into three categories: 0-33% of total operating budget from tuition revenue; 34-66%; and 67%+.

Of course, tuition dependency is highly correlated to whether an institution is public or private, so we've denoted the percentage of each in the corresponding data.

Generally speaking, less tuition dependent institutions are public, highly tuition dependent institutions are private, and moderately tuition dependent institutions are almost equally weighted between public and private.

MarCom Budgets as a Percentage of Institutional Budget
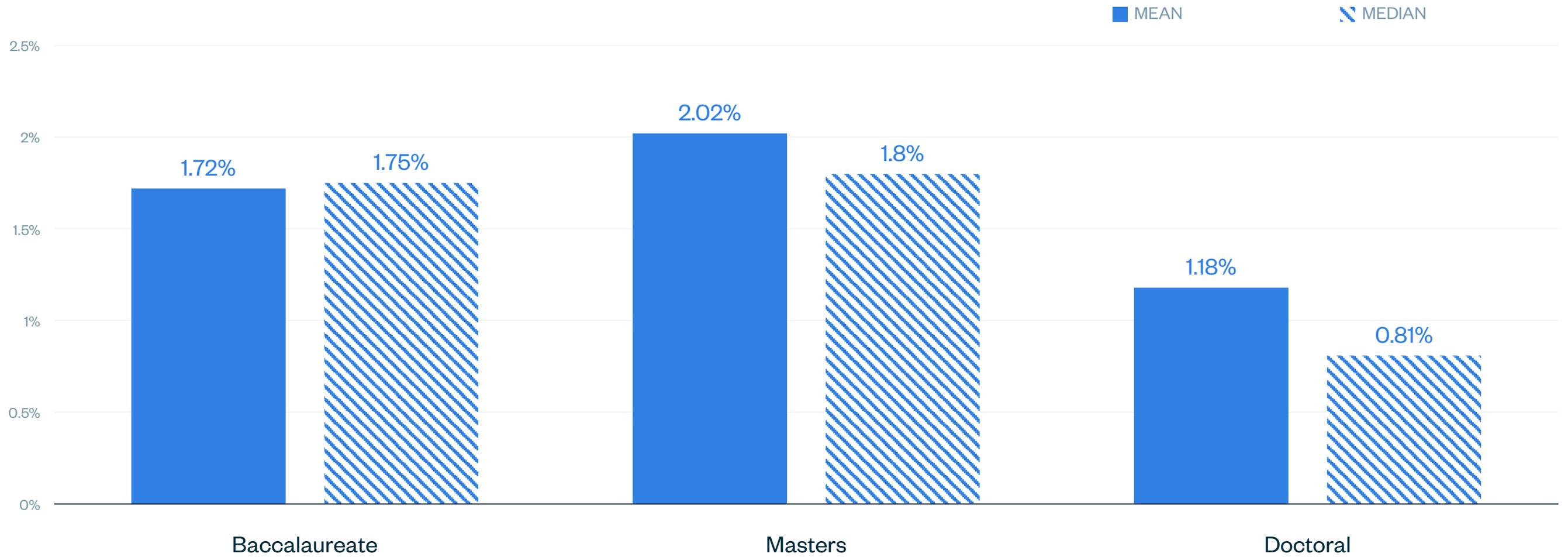
MarCom Budgets Per Enrolled Student

By Enrollment

	<3k	3k-12k	>12k
Mean	$744.51	$499.41	$244.74
Median	$608.35	$352.31	$163.07
Min	$129.59	$74.37	$31.36
Max	$2,895.16	$6,861.06	$2,993.54

By Tuition Dependency

	0-33%	34%-66%	67% or more
Mean	$300.84	$544.23	$496.39
Median	$148.01	$349.20	$423.32
Min	$31.36	$35.47	$74.37
Max	$2,993.54	$6,861.06	$2,895.16

Budget Changes

How has your budget changed in the last year?

	Less Tuition Dependent (0-33%)	Moderately Tuition Dependent (34-66%)	Heavily Tuition Dependent (67%+)
Increased	**33%**	**31%**	31%
Decreased	24%	21%	**39%**

KEY INSIGHT

When we analyze changes in budget by level of tuition dependency, we observe stark contrasts for institutions highly reliant on tuition revenue.

Lead Marketers at **lesser & moderately tuition dependent** institutions are nearly 50% more likely to report their budget has **increased** than decreased in the last year.

However, Lead Marketers at **heavily tuition dependent** institutions are 20% more likely to report that their budget has **decreased** than increased.

Staff Salaries

MarCom Budget / Staff Salaries & Benefits Only

	Baccalaureate	Masters	Doctoral
Mean	$816,933	$769,759	$3,001,275
Median	$700,000	$649,000	$2,000,000
Min	$160,000	$71,000	$0
Max	$2,500,000	$2,200,000	$40,000,000

Enrollment	<3k	3k-12k	>12k
Mean	$557,214	$1,741,42.	$2,608,545
Median	$419,000	$1,000,000	$1,450,000
Min	$0	$0	$100,000
Max	$2,767,007	$23,558,000	$35,760,000
Tuition Dependency	**0-33%**	**34%-66%**	**67% or more**
Mean	$2,609,374	$1,721,068	$1,224,187
Median	$950,000	$800,000	$1,000,000
Min	$90,000	$120,000	$0
Max	$35,760,000	$23,558,000	$6,000,000

True MarCom Budget

Central MarCom Budget / True Budget

Budget minus Staff Salaries

	Baccalaureate	Masters	Doctoral
Mean	$625,184	$1,282,601	$2,753,332
Median	$468,000	$720,647	$1,532,500
Min	$90,000	$25,000	$100,000
Max	$2,767,007	$23,558,000	$37,760,000

KEY INSIGHT

New to our study this year is the True Budget, calculated by redacting staff salaries from the Total MarCom Budget.

While this helps to give further insight into the total budgets that Lead Marketers manage, we know that budgets for marketing expenditures also live in the admissions, advancement, and athletics departments, as well as college and unit level divisions, depending on the institution.

Still, this is an important benchmark to track and measure over time as campuses become more integrated and budgets are aligned.

Central MarCom Budget / True Budget (Budget minus staff salaries)

By Enrollment

	<3k	3k-12k	>12k
Mean	$557,214	$1,741,427	$2,608,545
Median	$419,000	$1,000,000	$1,450,000
Min	$0	$0	$100,000
Max	$2,767,007	$23,558,000	$35,760,000

By Tuition Dependency

	0-33%	34%-66%	67% or more
Mean	$2,609,374	$1,721,068	$1,224,187
Median	$950,000	$800,000	$1,000,000
Min	$90,000	$120,000	$0
Max	$35,760,000	$23,558,000	$6,000,000

MarTech

MarCom Budget / MarTech

	Baccalaureate	Masters	Doctoral
Mean	$39,438	$89,070	$161,714
Median	$40,000	$65,000	$100,000
Min	$1,000	$350	$2,500
Max	$150,000	$400,000	$2,000,000
MarTech Spend as a % of Total MarCom Budget	**2.73%**	**4.50%**	**2.77%**

KEY INSIGHT

MarTech investments account for only 3% of marketing expenditures in higher ed. That number pales in comparison to the corporate world where martech investments comprise 26% of marketing budgets, according to a recent study from Gartner.

Actual MarTech investment varies wildly in every institution type — from as little as $350 to $2,000,000.

These data are especially notable given the constraints of budgets and staffing given technology's historical role as a leverage point to allow teams to do more with less.

MarCom Budget / MarTech

By Enrollment

	<3k	3k-12k	>12k
Mean	$49,126	$86,080	$181,133
Median	$40,000	$65,00	$100,000
Min	$1,000	$350	$5,000
Max	$300,000	$400,000	$2,000,000
MarTech Spend as a % of Total MarCom Budget	3.26%	4.19%	3.47%

By Tuition Dependency

	0-33%	34%-66%	67% or more
Mean	$170,229	$99,639	$76,561
Median	$85,000	$50,000	$60,000
Min	$350	$1,000	$2,000
Max	$2,000,000	$1,100,000	$300,000
MarTech Spend as a % of Total MarCom Budget	4.18%	3.69%	3.28%

Ad Spending

MarCom Budget / Ad Spending

Spending to place (not produce) digital advertising

2019

Increased

63 %

2021

Increased

53 %

Increased

→ **Baccalaureate—42%**

→ **Masters—62%**

→ **Doctoral—51%**

Spending to place (not produce) traditional advertising

2019

Stayed the same

42 %

2021

Stayed the same

47 %

Increased

→ **Baccalaureate—12%**

→ **Masters—20%**

→ **Doctoral—20%**

KEY INSIGHT

The majority of Lead Marketers report increasing their digital ad spend, though not quite as dramatically as they did in 2019. Nearly twice as many Lead Marketers reported their digital ad spend declined in 2021-22 than in 2019-20.

Further, nearly half of all Lead Marketers report their traditional ad spending stayed the same in what may be an early sign that the swing from traditional to digital may be finding equilibrium.

MarCom Budget / Total Ad Spending

	Baccalaureate	Masters	Doctoral
Mean	$173,179	$425,717	$969,898
Median	$111,000	$350,000	$512,500
Min	$1,000	$6,200	$7,000
Max	$600,000	$2,700,000	$9,500,000

Enrollment	<3k	3k-12k	>12k
Mean	$196,491	$518,153	$980,109
Median	$147,500	$430,000	$465,500
Min	$1,000	$6,000	$10,000
Max	$600,000	$3,100,000	$9,500,000
Tuition Dependency	**0-33%**	**34%-66%**	**67% or more**
Mean	$704,989	$547,808	$552,439
Median	$282,500	$320,000	$330,000
Min	$9,000	$1,000	$6,000
Max	$9,500,000	$6,000,000	$3,500,000

MarCom Budget / Digital vs Traditional

What is your best estimate of the amount the central marketing & communications unit spent to place (not produce) digital advertising last year?

Digital	Baccalaureate	Masters	Doctoral
Mean	$138,701	$295,271	$636,243
Median	$100,000	$250,000	$350,000
Min	$1,000	$5,000	$5,000
Max	$500,000	$1,500,000	$8,000,000

Traditional	Baccalaureate	Masters	Doctoral
Mean	$65,129	$150,012	$389,584
Median	$45,000	$100,000	$150,000
Min	$2,500	$5,000	$15,000
Max	$300,000	$1,200,000	$3,000,000

% Digital

Baccalaureate

68%

Masters

66%

Doctoral

62%
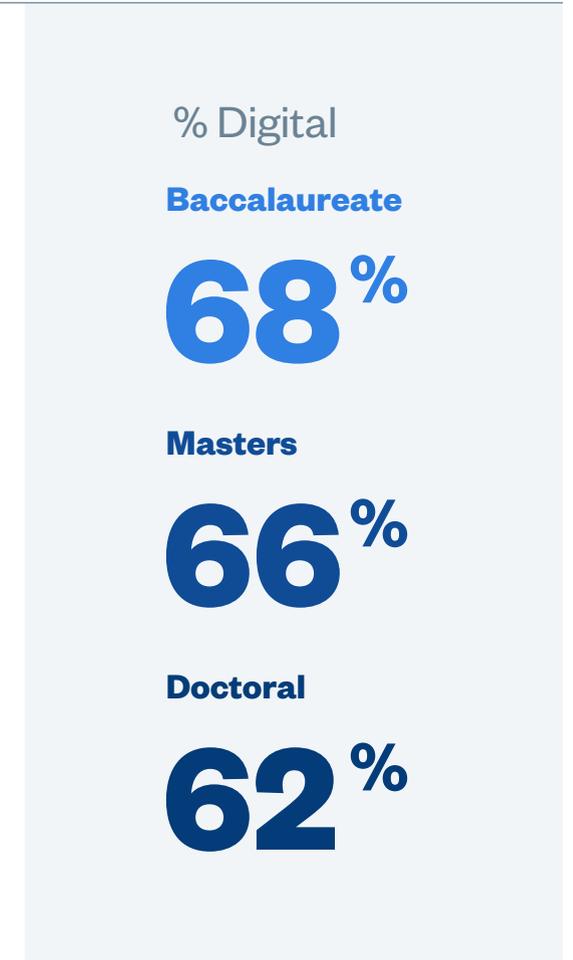
MarCom Budget / Digital vs Traditional By Enrollment

What is your best estimate of the amount the central marketing & communications unit spent to place (not produce) digital advertising last year?

Digital	<3k	3k–12k	>12k
Mean	$155,513	$360,289	$636,796
Median	$125,000	$300,000	$300,000
Min	$1,000	$5,000	$5,000
Max	$530,000	$2,000,000	$8,000,000

Traditional	3k	3k–12k	>12k
Mean	$72,565	$182,150	$400,645
Median	$50,000	$100,700	$150,000
Min	$0	$5,000	$10,000
Max	$350,000	$2,000,000	$3,000,000

% Digital

<3k

68%

3k–12k

66%

>12k

61%

MarCom Budget / Digital vs Traditional By Tuition Dependency

What is your best estimate of the amount the central marketing & communications unit spent to place (not produce) digital advertising last year?

Digital	0–33%	34%–66%	67% or more
Mean	$442,466	$389,143	$389,372
Median	$150,000	$205,000	$250,000
Min	$5,000	$1,000	$5,000
Max	$8,000,000	$3,100,000	$3,000,000

Traditional	0–33%	34%–66%	67% or more
Mean	$288,775	$237,353	$192,343
Median	$100,000	$100,000	$100,700
Min	$8,000	$0	$4,000
Max	$2,000,000	$3,000,000	$2,000,000

% Digital

0–33%
61%

34%–66%
62%

67% or more
67%
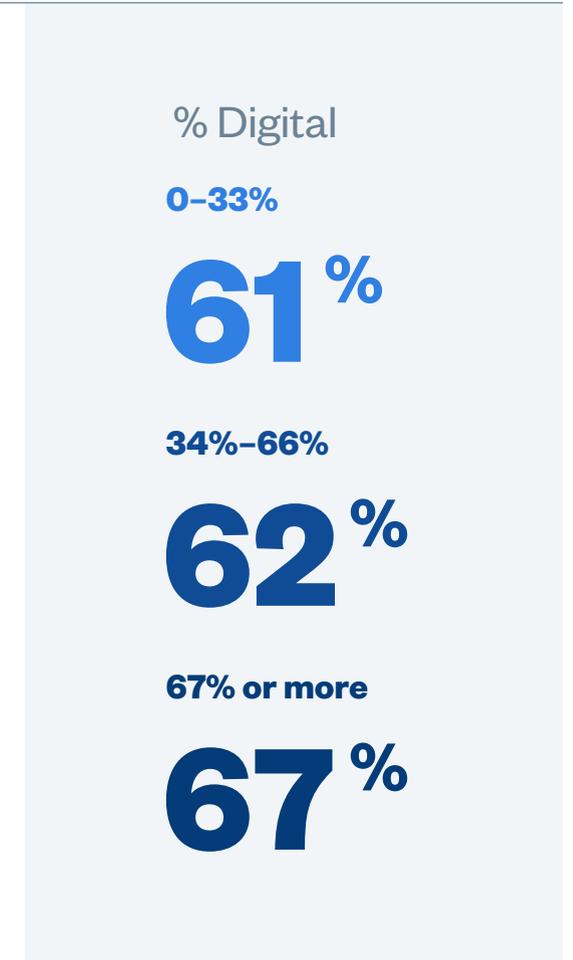
What if higher education allocated marketing budgets like the <u>corporate world</u>?

Using data from Gartner's Annual <u>CMO Spend Survey</u> to derive corporate marketing benchmarks, we began studying the differences in how corporations invest in marketing compared to higher education. Here's what we found:

→ Higher ed allocates more than half its entire budget (56%) to labor expenses. Corporations allocate just 25% in comparison.

→ Proportionally, the greatest difference in budget allocations in the investment in martech. Corporations allocate more than a quarter of their entire marketing budget to martech compared to just 3.2% in higher education.

→ Corporations allocate nearly 40% more to advertising compared to higher education (30.8% to 22.4%). Notably, both spend nearly identical proportions of their total advertising budget on digital versus traditional media (both 68% digital, 32% traditional).

Marketing Budget by Allocation

Legend:
- Other
- MarTech
- Traditional Advertising
- Digital Advertising
- Labor

Higher Ed
- Other: 19.2%
- MarTech: 3.2%
- Traditional Advertising: 7.2%
- Digital Advertising: 15.2%
- Labor: 56%

Corporate
- Other: 17.6%
- MarTech: 26.6%
- Traditional Advertising: 9.9%
- Digital Advertising: 20.9%
- Labor: 25%

Marketing Expenditures as a
Percentage of Total Revenue
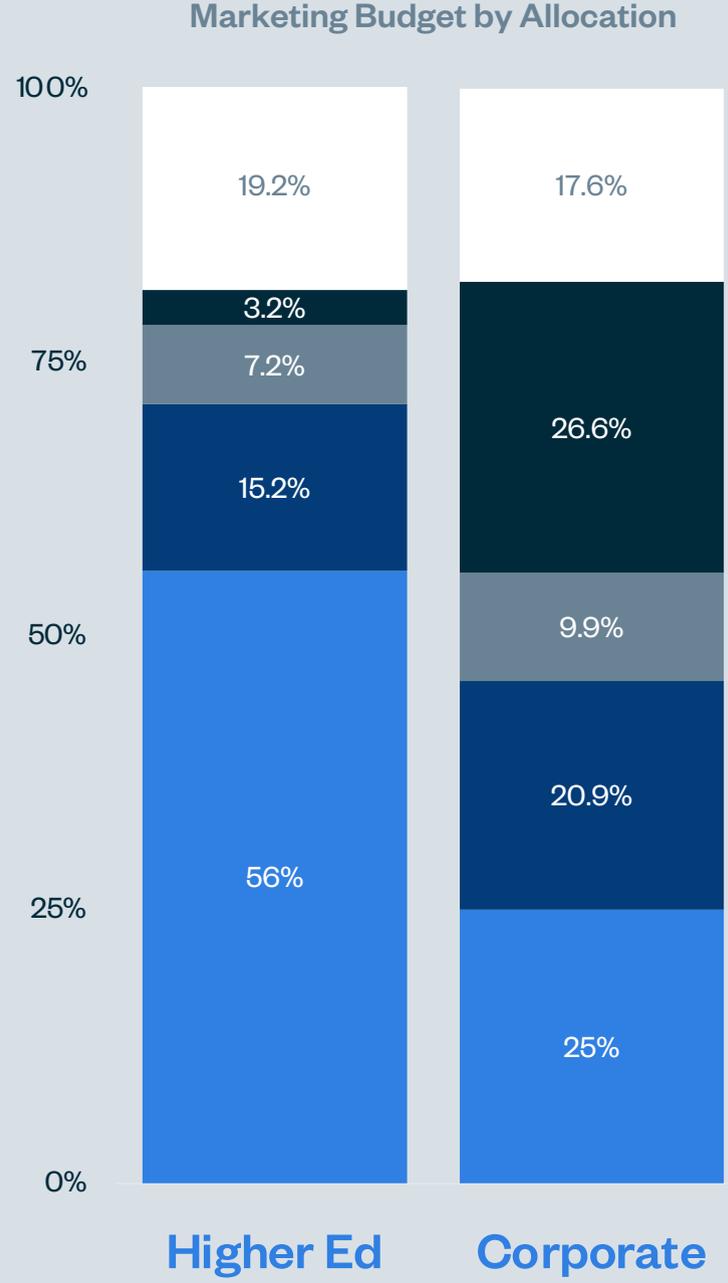
What if higher education allocated marketing budgets like the corporate world?

However, differences in marketing budget allocation pale in comparison to the difference in marketing investment as a whole — the amount invested as a portion of total revenue.

For the past seven years, corporations averaged investing just over 11% of total revenue to marketing. In 2021, that dropped precipitously — no doubt a consequence of the pandemic's economic impact — to just 6.4% of total revenue. Still, corporations invest 4x more compared to higher education which averages allocation 1.6% of total revenue to marketing expenditures.

In order to compare apple to apples, the figure on the right depicts marketing budget allocations as a percentage of total revenue. It's worth reexamining our prior key differences:

→ While higher education allocates more of its marketing budget to labor, corporations spend nearly 80% more on marketing labor in total as a percentage of revenue. In fact, corporations spend as much on their marketing labor as higher ed does on all marketing investments combined.

→ Corporations previously outspent higher education in their investments in martech by more than 8:1 as a portion of their marketing budgets. As a percentage of total revenue, that difference becomes even more jarring. For every $100 that higher education invests in marketing technology, corporations invest more than $3,225.

→ While corporations allocate 40% more of their marketing budget to advertising, they spend nearly 4.5x more on advertising as a percentage of total revenue than higher ed. In fact, corporations spend about 25% more on advertising than higher education spends on all marketing expenditures combined.
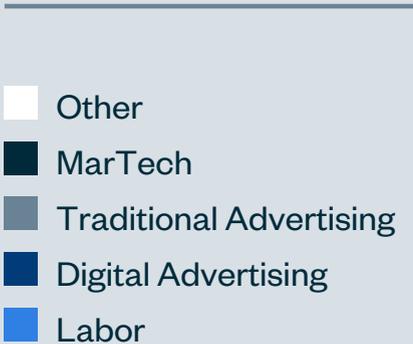
Legend:
- Other
- MarTech
- Traditional Advertising
- Digital Advertising
- Labor

Higher Ed values: 0.31%, 0.05%, 0.12%, 0.24%, 0.90%

Corporate values: 1.13%, 1.70%, 0.63%, 1.34%, 1.60%

Higher Ed   **Corporate**
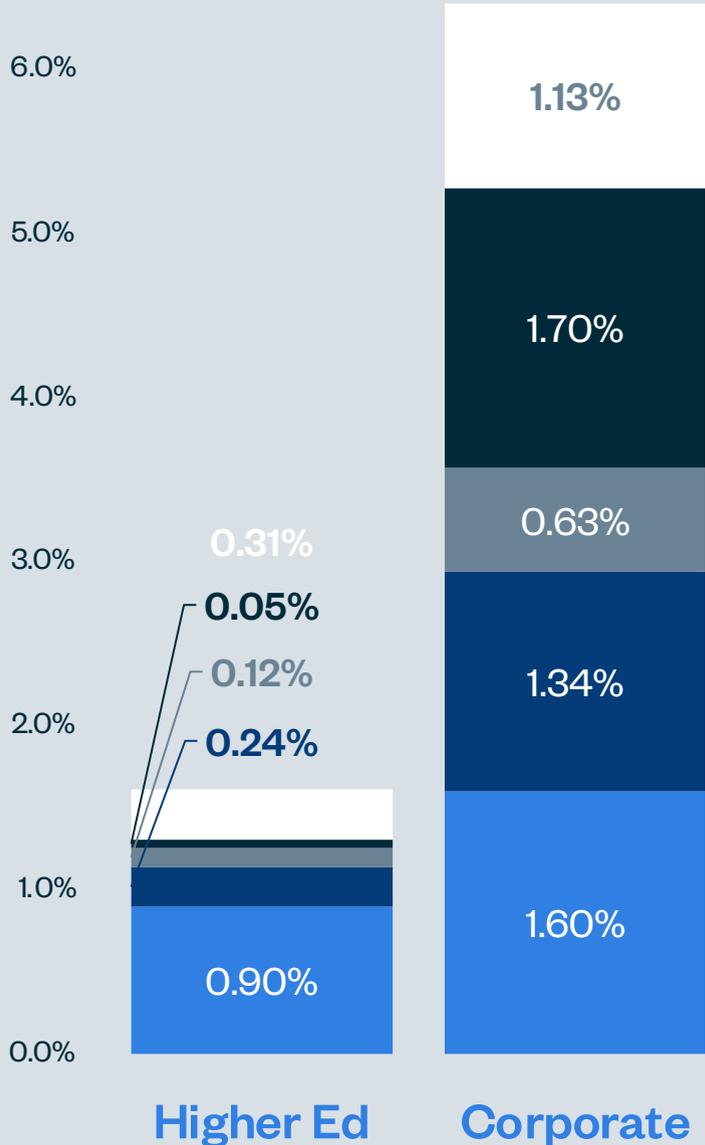
What if higher education allocated marketing budgets like the <u>corporate world</u>?

It's worth reiterating that this comparison is using data from a year where corporate marketing expenditures as a percentage of total revenue had dropped substantially compared to its norm, while higher ed's investment as a percentage of revenue was in line with our findings from the 2019-20 Higher Ed CMO Study.

It's neither our conclusion nor belief that the challenges facing higher education can be solved simply by increasing marketing budgets. Rather, our goal is to provide some context as to the state of institutional investment in a critical area often overly scrutinized and perpetually underfunded.

Still, it begs the question — what would the net impact be to an institution who, while not able to increase its marketing budget four-fold, did take the steps necessary to consolidate and align all marketing expenditures while employing a cohesive marketing strategy across its institution?

Higher education is unique in that its customer life cycle from prospect to student to alumnus to donor may span several decades. What long term growth could be realized by removing all point solutions and integrating data, systems, and tools alongside an integrated strategy with a cohesive budget? Beyond economies of scale and newfound efficiencies, what impact could this achieve in growing brand affinity, driving enrollment growth, and maximizing fundraising over time?

Organizational Structure & Staffing

Higher ed has a labor problem.

The labor crisis is only beginning. And marketing functions, particularly those integrated with specific technology competencies, already amongst the most in-demand jobs in the country, are predicted to grow in demand through the rest of the decade.

More than 75% of Lead Marketers report that they do not have the staffing needed to meet expectations of leadership.

Lead Marketers at Baccalaureate institutions are 50% more likely to report their staff has increased versus decreased. Compared with Masters and Doctoral institutions who are more likely to report staffing decreases.

The greatest staffing shortages comes from highly tuition dependent institutions, who are 83% more likely to report a staffing decrease than increase.

Average Number of FTE Employees

	1–5	6–10	11–20	Over 20	2019 Mean	2021 Mean	Net Change
Baccalaureate	27%	37%	29%	6%	9	10	**+ 6.7%**
Masters	24%	41%	32%	3%	10	10	**− 2.0%**
Doctoral	2%	12%	21%	65%	24	29	**+ 20.7%**
Total					16	17	**+ 6.3%**

Average Number of FTE Employees

	<3k	3k-12k	>12k		Private	Public
Mean	7.3	14.4	29.3	**Mean**	14.6	21.7
Median	7	11	24	**Median**	10	16
Min	1	2	3	**Min**	1	2
Max	23	56	90	**Max**	90	87

Adequacy of Resources

" Our marketing department has the staff needed to meet the expectations of leadership."
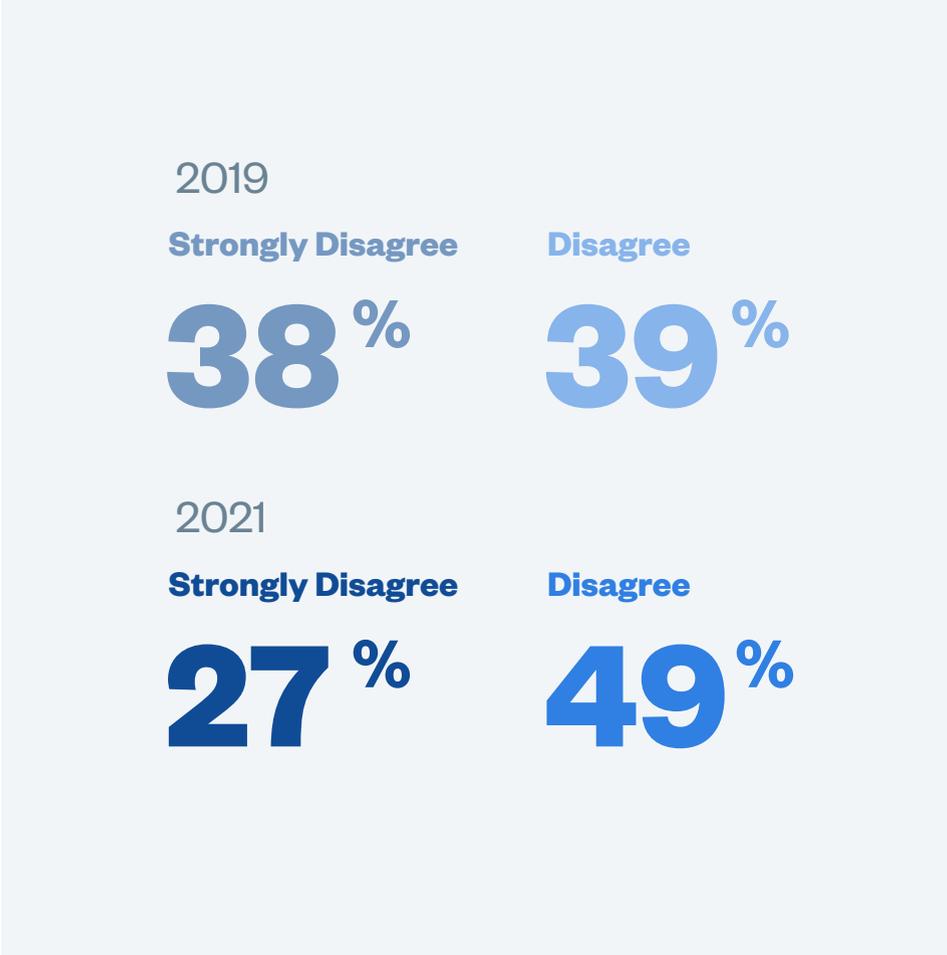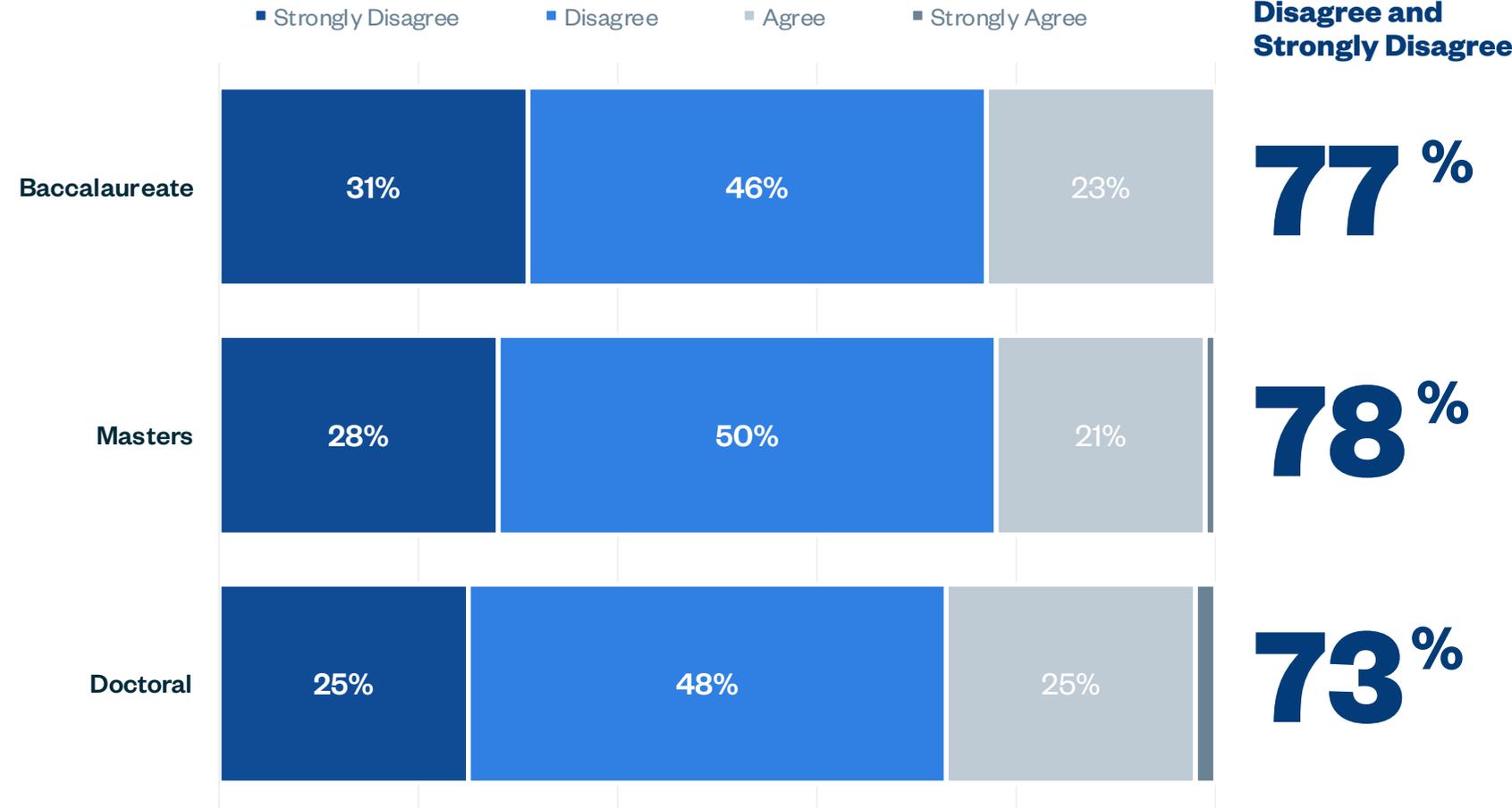
■ Strongly Disagree　■ Disagree　■ Agree　■ Strongly Agree

Disagree and Strongly Disagree

	Strongly Disagree	Disagree	Agree
Baccalaureate	31%	46%	23%
Masters	28%	50%	21%
Doctoral	25%	48%	25%

Baccalaureate — **77** %

Masters — **78** %

Doctoral — **73** %

2019

Strongly Disagree — **38** %　　**Disagree** — **39** %

2021

Strongly Disagree — **27** %　　**Disagree** — **49** %

Changes in Staffing

How has the total number of employees in your department (Central Marketing/ Communications) changed in the last year?

	Baccalaureate	Masters	Doctoral
Increased	**27%**	19%	28%
Decreased	18%	**31%**	**35%**

Enrollment	<3k	3k-12k	>12k
Increased	17%	25%	30%
Decreased	23%	31%	**35%**
Stayed the Same	61%	**44%**	34%

	Private	Public
Increased	20%	31%
Decreased	28%	33%
Stayed the Same	**51%**	**36%**

Changes in Staffing

How has the total number of employees in your
department (Central Marketing/Communications)
changed in the last year?

	Less Tuition Dependent (0-33%)	Moderately Tuition Dependent (34-66%)	Heavily Tuition Dependent (67%+)
Increased	30%	28%	**18%**
Decreased	28%	29%	**33%**

KEY INSIGHT

Staffing is relatively stagnant across the industry — except for tuition dependent schools, which are suffering greatly.

They're 83% more likely to report that their staffing levels have decreased than increased.

How can the most tuition-dependent institutions continue to compete in an already <u>constrained labor market?</u>

Higher education, like many other industries, is being crunched by a labor shortage. Teams are understaffed, people are reporting high levels of burnout, and there's little data to indicate these issues will come to a resolution any time soon. All the while, higher ed marketing is trying to bolster internal competencies, especially at the intersection of technology, marketing and digital strategy — but so is everyone else.

According to World Economic Forum's "<u>Future of Jobs</u>" Study, Digital Marketing positions rank 4th in growing demand over the next five years. In fact, Digital Marketing trails only position in Big Data, Artificial Intelligence, and Machine Learning for growth.

But our data indicate that these issues are further compounded because they disproportionately affect highly tuition-dependent institutions. In other words, the chasm between the haves & have nots is wide — and widening.

How can the most tuition-dependent institutions continue to compete in an already <u>constrained labor market?</u>

As we dig deeper into the data, we find that trend resurface again and again. In addition to being 83% more likely to report a staffing decrease than increase, highly tuition dependent institutions report:

→ Lowest true budget overall — **$1.2mm**

→ Lowest average martech investment — **$76k**

→ Most likely to report budget decrease — **20%**

→ Most likely to report undergraduate enrollment decrease — **14%**

→ Most likely to report staffing decrease — **83%**

Digital Strategy & MarTech

Digital is still a priority, but growth is slow.

Less than 1/3 Lead Marketers report integrating their CRM & CMS, long viewed as a fundamental building block of data-infrastructure, with virtually no increase from 2019-20.

Open-source CMS is now reported by more than half (54%) of all Lead Marketers, a net 10% increase since 2019-20.

The rate of martech investment may be slowing. Lead Marketers are twice as likely to report martech investment increases in the past year than decreases. However, in the 2019-20 CMO Study, Lead Marketers were 10x as likely to report increases than decreases.

One in five Lead Marketers at highly tuition dependent institutions report a decrease in spending on web design, development, and support.

MarTech / Integration

Do you integrate your CMS with your CRM for data collection and personalized content across your website?

	Baccalaureate	Masters	Doctoral
Yes	35%	24%	30%
No	61%	64%	57%
Not Sure	4%	12%	13%

	2019	**2021**
Yes	32%	30%
No	58%	59%
Not Sure	9%	10%

KEY INSIGHT

CRM & CMS integration has been a bellwether not only for a mature marketing operation but as a baseline indicator of an institution's data strategy. After all, the impact and effectiveness of digital strategies are directly correlated to the data strategies underpinning those initiatives.

Personalization in the digital age is table stakes as the expectation for hyper-personalized and responsive in-the-moment brand experiences take over.

In 2019-20, we asked Lead Marketers who hadn't previously integrated their CRM & CMS if they planned to do so within the next 12 months — 35% said yes. Despite those intentions, integration remains virtually unchanged from two years ago.

MarTech / CMS & CRM

Which Content Management System (CMS) is used for your primary institutional website?

	2019	2021
WordPress	25%	30%
Drupal	24%	24%
Hannon Hill-Cascade	11%	10%
OmniUpdate-OU Campus	12%	9%
Terminalfour	3%	3%
Ingeniux	1%	0%
Other	17%	21%
Don't know	3%	2%

What Customer Relationship Management System (CRM) does your institution use to manage inquiries for admission?

	2019	2021
Slate	47%	57%
Salesforce	11%	12%
Ellucian	9%	7%
TargetX	9%	5%
HubSpot	1%	0%
Other	13%	9%
We don't have a CRM	4%	4%
Don't know	7%	5%

MarTech / CMS

Which Content Management System (CMS) is
used for your primary institutional website?

	Baccalaureate	Masters	Doctoral
WordPress	39%	30%	28%
Drupal	18%	25%	23%
Hannon Hill-Cascade	6%	8%	15%
OmniUpdate-OU Campus	6%	8%	13%
Terminalfour	0%	0%	1%
Ingeniux	4%	1%	4%
Other	22%	27%	15%
Don't know	6%	1%	1%

MarTech / CRM

What Customer Relationship Management System (CRM)
does your institution use to manage inquiries for admission?

	Baccalaureate	Masters	Doctoral
Slate	66%	59%	53%
Salesforce	6%	7%	18%
Ellucian	6%	7%	7%
TargetX	4%	6%	6%
HubSpot	0%	1%	0%
Other	12%	11%	7%
We don't have a CRM	4%	3%	2%
Don't know	2%	6%	7%

Tuition Dependency	0–33%	34%–66%	67% +
Slate	42%	54%	68%
Other	21%	9%	5%
Don't know	14%	4%	1%

MarTech / Investment

How has your budget changed in the last year? —
Spending on marketing technology/software
(i.e., automation, CRM, analytics)

	Baccalaureate	Masters	Doctoral
Increased	24%	32%	32%
Decreased	8%	15%	8%
Stayed the Same	65%	49%	58%
Don't Know	4%	4%	2%

	Increased	Decreased
2019-20	39%	4%
2021-22	30%	10%

Digital Strategy / Web Resources

How has your budget changed in the last year? —
Spending on website design, development and support

Tuition Dependency	0–33%	34%–66%	67% or more
Increased	28%	34%	47%
Decreased	13%	9%	20%

	Increased	Decreased
2019-20	39%	9%
2021-22	38%	14%

	Private	Public
Increased	43%	28%
Decreased	15%	12%

Digital Strategy / Ownership

Which of the following best describes where your web development resources are primarily located?

Within marketing and communications teams	83%
Within information technology	24%
We fully outsource web development resources	8%

Total Enrollment	<3k	3k–12k	>12k
Within marketing and communications teams	86%	86%	78%
Within information technology	16%	23%	32%
We fully outsource web development resources	14%	7%	3%

How does higher ed compete in a <u>cookie-less world?</u>

"We've experienced two years' worth of digital transformation in two months."

Microsoft CEO Satya Nadella shared that dramatic summation in the Spring of 2020. Similarly, a study conducted by Boston Consulting Group found that e-Commerce experienced 10 years' worth of growth in just 8 weeks at the onset of the pandemic.

But that was nearly two years ago, and while the torrid pace of digital transformation has lessened, the cultural landscape has changed dramatically. Most notably with regard to consumer behavior, preference, and sentiment. Along with it, the need for digital marketing maturity has become a veritable mandate.

But the foundation of digital maturity is an organization's data infrastructure. It's the reason we continue to champion CRM & CMS integration because it is nearly impossible to mature organizationally from a nascent state of digital marketing maturity to an emerging state. The looming removal of third-party cookies and growing antitrust legislation, primarily targeted towards Facebook and Google, only increases the urgency that marketers must take in shoring up their institution's data strategies.

Paradoxically, the more advanced your digital marketing maturity is, the more human it becomes. The infrastructure trio of centralized and reliable data, marketing automation, and continual measurement are what enable brands to create highly personalized, multi-moment brand experiences simultaneously across channels. Personalization is crucial to building consistent and authentic brand experiences — which underpin trust; something that has been increasingly fragile — especially in higher education — since the pandemic started.

How does higher ed compete in a <u>cookie-less world?</u>

On which platforms have you used paid advertising in the last year? (Mark all that apply)

Advertising Platform

Facebook	97%
Instagram	84%
LinkedIn	68%
YouTube	58%
Snapchat	30%
TikTok	16%
Other	16%
Vimeo	6%
No paid social	2%

Data from our study indicate higher education's substantial reliance on Facebook (including Instagram) and Google (YouTube) for advertising.

So much so that the only other platform not owned by Google or Facebook with more than 30% reported use was LinkedIn — a near must-have for graduate and continuing degree programs.

On the following page, we've borrowed liberally from Dell's '<u>Four Steps of Data Maturity</u>' and Boston Consulting Group's '<u>Digital Marketing Maturity Model</u>' to create a high-level assessment of your digital brand experience and a recommendation for how CMOs can champion their institutions to move quickly in building their data infrastructure.

DIGITAL STRATEGY — How does higher ed compete in a cookie-less world?

State of Organizational Data:	Data is a **Constraint**	Data is a **Tool**	Data is a **Strategy**	Data is a **Competitive Advantage**
Data Collection	No 1st party data collection. Institution is wholly reliant on 2nd and 3rd party data sources	Collects some 1st party data, but either integrated manually or supported by manual actions	1st, 2nd & 3rd party data are fully integrated	Only 1st party data is needed and collected
Data Integration & Centralization	Data is siloed across myriad of databases and data systems with no single source of truth. Little to no data integration	Some organizational data centralization and source integration, but constrained by the use of multiple databases leading to duplicate contact records	Data is centralized & integrated across the organization but is constrained by varying rates of adoption & use	Data is centralized, integrated, and dynamically used across the organization
Data Integrity & Hygiene Practices	No systematic data hygiene practices yielding virtually no data integrity	Manual data validation and cleaning on an ad hoc basis leading to unreliable data	Data is systematically validated and cleaned to campus-wide standards; at least partially automated	All data practices are systematic and fully automated with 100% compliance
Data Intelligence	Data is only used intermittently to inform decisions and constrained by data integrity and rates of adoption	Data relied upon for some decision-making but dependent on personal rates of adoption and familiarity	Data becomes key institutional differentiator and used to regularly to improve performance	Advanced capabilities enable hyper-personalization and dynamic responsiveness
Measurement & Reporting	Data is manually extracted data with ad hoc analysis on an inconsistent basis	Institutional KPIs are established and tracked manually with varying levels of adoption	Dashboards tracking KPIs with automated reporting are used to inform key decisions	Dashboards with predictive and prescriptive analytics are able to test strategies & tactics of desired outcomes
CRM & Marketing Automation	No CRM (or defunct). No internal automation capacities.	Multiple CRMs operated and siloed by department (marketing, admissions, advancement). Limited integration to CMS and other martech platforms. Some automation based on conversion triggers, but personalization is limited	Enterprise CRM integrated with CMS and all martech platforms. Automation enabled across stakeholder journey with improved levels of personalization	Enterprise CRM leverages data, martech integrations, and end-to-end user journey mapping. Advanced capabilities enable hyper-personalization and dynamic responsiveness
Digital Brand Experience	Antiquated & disjointed	Generic & conversion-oriented	Authentic, connected & personalized	Intuitive, holistic & human
CMOs Must Champion	**The need for a cultural shift in how the institution operates.** CMOs should champion the need for an institutional data strategy as a critical component of infrastructure to support marketing, admissions, advancement, and other key growth areas.	**The need for the proper tools and training in collaboration with other key departments.** CMOs should champion the need for a single institutional CRM used by marketing, enrollment, advancement and throughout institution. Ensure its integration with CMS and other martech platforms.	**The need for regular review of strategic KPIs to ensure all key decisions are informed by data.** CMOs should champion the use of dashboards to track KPIs and ensuring reporting is automated so that it becomes nearly impossible to make decisions without data support.	**The need for continued investment to ensure competitive advantage is retained.** CMOs should ensure internal practices are continuously reviewed to allow for systematic and iterative updates, changes, and additions as technology advances.

SimpsonScarborough is a **full-service marketing agency** exclusively for higher ed.

Research

Strategy

Digital
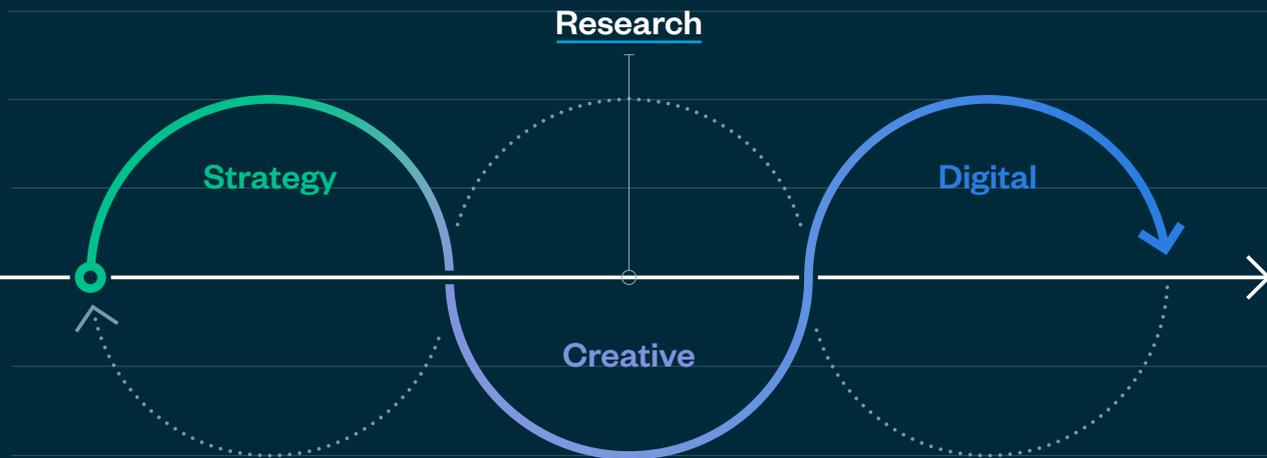
Creative

Our Services

Research
- Brand and messaging
- Strategic planning
- Recruitment
- Alumni engagement
- Fundraising
- Image and perception
- Creative testing
- Conjoint analysis
- TURF analysis
- Discrete choice analysis
- Segmentation
- Max differential
- Factor analysis
- Surveys
- In-depth interviews
- Focus groups

Strategy
- Brand positioning and platform development
- Message creation and mapping
- Data-driven personas
- Competitor analysis
- Brand assessments
- Brand launch planning
- Content strategy development

Creative
- Brand campaigns
- Enrollment campaigns
- Capital campaigns
- Live mascot branding
- Visual identity
- Logo development
- Motion graphics
- Television spots
- Aerial drone
- Guidelines
- Advertising
- Marketing collateral
- Content development
- Video & radio
- Documentary video
- Episodic video
- Virtual reality
- Web, digital, and social
- Search engine optimization
- Experiential & environmentals
- Training & workshops
- Brand anthem video
- Animation

Digital
- Content strategy
- Website design
- SEO strategy
- Analytics review
- Custom CMS builds
- Email marketing
- Drupal
- WordPress
- Terminal4
- Cascade
- Custom applications
- Touchscreen displays
- Digital viewbooks

Media & Marketing
- Demographic, geographic, and audience research
- Competitive analysis
- Multi-year institutional marketing plans
- Media planning, strategy, & integrated plan development
- Channel strategy
- Digital audio, native, paid search/SEM, programmatic, SEO, social, video, OTT
- Broadcast TV, radio, shared mail, print
- Media negotiation, contracting, and traffic
- Data & technology discovery
- Interactive dashboards
- Brand health metrics & scorecards Data integrations
- Scenario planning and ROI calculators

SimpsonScarborough is a full-service research, branding, and marketing agency, and higher education's premier data-driven partner.

As champions and stewards of colleges and universities, we provide higher ed brands the confidence of rigorous and comprehensive research — the cornerstone of our work — informed strategy, inspired creative, and human-centered digital. The trusting relationships we've formed and the campuses and communities we've brought together are among our most valuable assets.

Individually, we've held nearly every job in the industry and hail from every part of the country. Now that we're a fully remote agency, the places we call home are spread across the country, too.

Most of all, we're proud, professional students — curious by nature and compassionate by choice, constantly putting in the hard and smart work to shape the industry we love and the brands that shape our world.

On behalf of all of us at SimpScar,

Thank you.

Simpson Scarborough

SimpsonScarborough is a woman-owned firm.

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