



Market Research: What it is and Why it Matters in Today's Higher Ed Landscape

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The State of Higher Education

Demographics are changing

- The number of high school graduates has decreased in most of the country and will not increase again until 2024.
- The number of adult and students returning to college has grown significantly.
- But adult enrollments have slowed as the economy surges.
- MBA and Law School applications are in free fall.
- Alternative forms of life-long learning and professional certifications are in demand. Many from alternative providers.

Resources are dwindling. Confidence is waning.

- Tuition at public institutions has increased 62% over the past 10 years.
- 51% of Americans would would change their degree type, institution or major.
- 23% of adults have confidence in colleges and universities.
- Less than 20 percent of publics will see their revenue increase by more than 3 percent and only half of private institutions will achieve growth of 3 percent.
- 1/3 of presidents think more than 10 institutions will close or merge in the next year.
- Nearly 1 in 8 predict their own institution could be affected in the next 5 years.

The State of Branding and Integrated Marketing



“A brand for a company is like a reputation for a person. You earn a reputation by trying to do hard things well.”

Jeff Bezos



“A brand is a living entity - and it is enriched or undermined cumulatively over time, the product of a thousand small gestures”

Michael Eisner

BERKSHIRE HATHAWAY INC.

“Your premium brand had better deliver something special,
or it’s not going to get the business.”

Warren Buffett



“The university must fill a void in global governance left by the loss of trust in government and business. And universities must speak out publicly as leaders in change for society.”

Richard Edelman

Market Research: A Foundation to Build From

What's The Why?

Sophistication of higher ed marketing strategies has increased

Marketing budgets are increasing to support the demand from presidents and boards to create stronger visibility and new revenue streams

A clear and compelling brand, leads to a stronger position from which to compete for students and funding

Marketing vs Branding In Higher Education

Branding

Sum of all associations

Long-term

Broad audiences

Experience is the product

KPIs: awareness, familiarity,
affinity, loyalty.

Marketing

Combination of messaging and
programs that drive choice

Short-term

Targeted audiences

Programs and offerings are the product

KPIs: request for information, campus
visit, application, enrollment

12 Characteristics of a strong brand strategy.

1 **Data-driven.**

Based on research with internal and external stakeholders.

2 **Supported.**

Developed with significant input from the campus community.

3 **Focused.**

Centered on a lead concept rather than attempting to embody an institution's entire offerings.

4 **Distinctive.**

Emphasizes attributes that competitor institutions do not.

5 **Motivating.**

Inspires external audiences to seek a relationship with the institution.

6 **Authentic.**

The institution must be able to credibly promote its positioning.

12 Characteristics of a strong brand strategy.

-
- 7 **Aspirational.**
Gives the institution something to live up to.
-
- 8 **Stable.**
Persists over time and through changes in executive leadership.
-
- 9 **Documented.**
Shared widely within the college community.
-
- 10 **Integrated.**
Aligned with the institution's strategic plan and reinforced through strategic business decisions.
-
- 11 **Strategic.**
Drives long-term marketing strategy rather than short-term tactics.
-
- 12 **Consistent.**
Reflected in all institutional marketing communications, from the website and recruitment materials to brand and program advertising.

Strong branding begins and ends with research.

Allows insights to move beyond anecdotes

Generates better understanding of target audiences

Mitigates risk

Builds confidence in decision-making

Proves or disproves hypotheses

Generates buy-in

Gathers key performance indicators

Data is the language of faculty

Market Research

Qual vs. Quant

	QUALITATIVE	QUANTITATIVE
GOAL	Exploratory	Conclusive
HYPOTHESIS	Broad	Narrow
VIEW	Whole picture	Focused
TIMING	Early	Later
DATA	Words, images	Numbers, statistics
ANALYSIS	Subjective	Objective
FORM	Focus groups, interviews	Surveys
FINDINGS	Directional	Projected to population
EXAMPLE	A vast majority agree... Most respondents feel... Some think... A few mentioned...	92% of prospects said... Younger alumni are more likely than older alumni to say...(47% vs. 12%)

Methodology



QUALITATIVE

On-campus discovery sessions

Focus groups with:

- Undergraduate prospects

- Graduate and distance/online prospects

- Alumni

In-depth Interviews with:

- Counselors

- Recruiters and research liaisons

- Higher ed peers

QUANTITATIVE

Online surveys of:

- prospective undergraduate students

- prospective graduate students

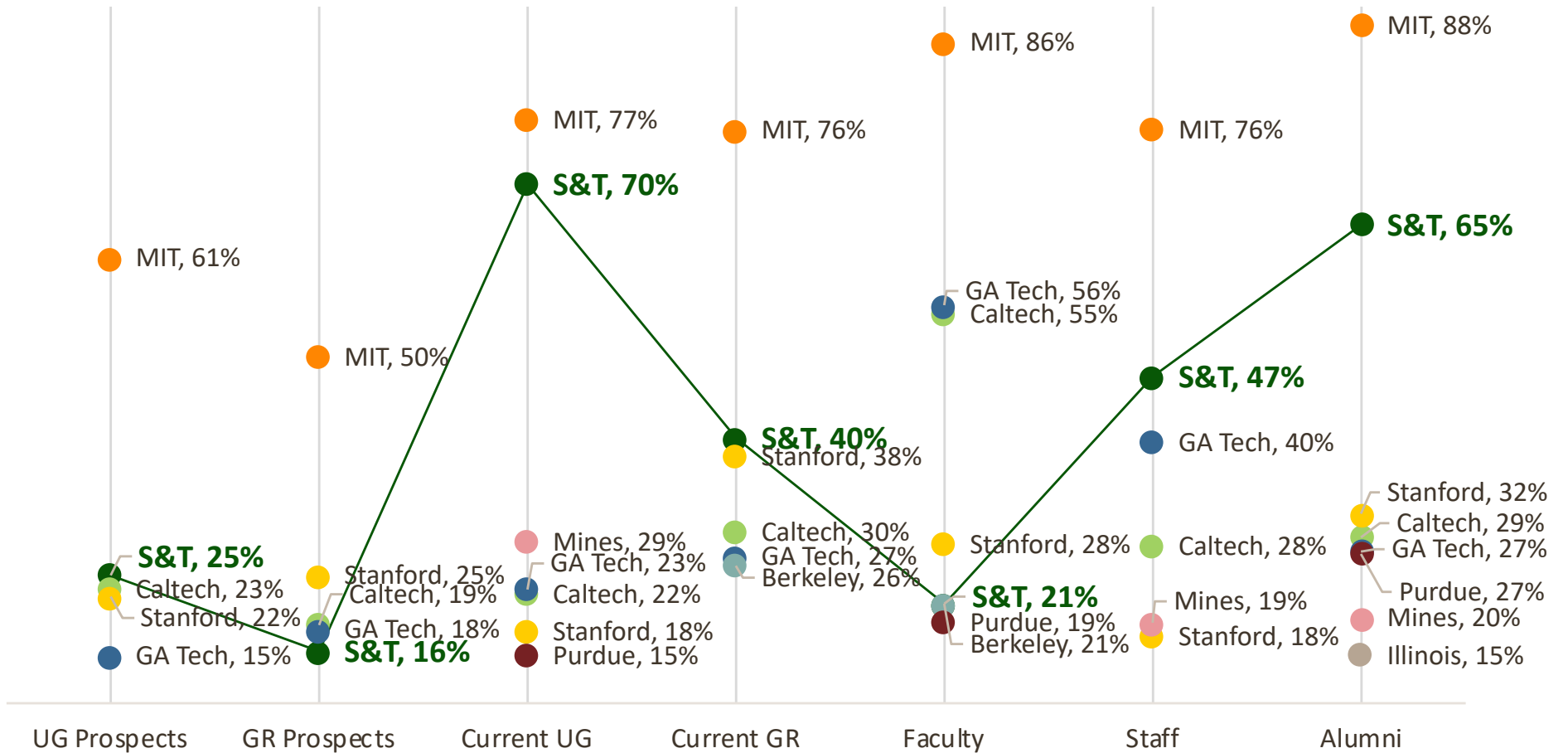
- current students (grad and undergrad)

- faculty and staff

- alumni

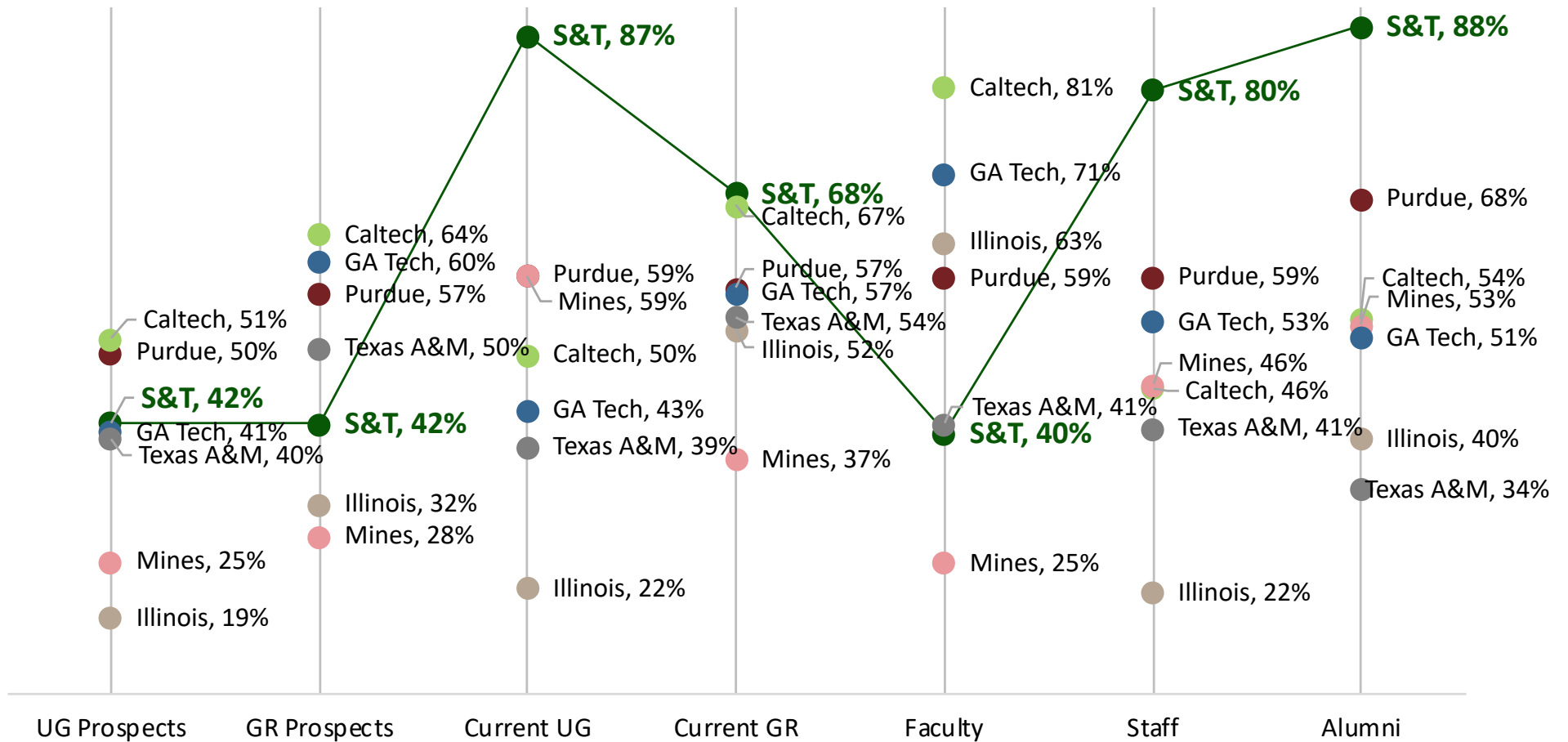
- high school counselors

Unaided Mentions of Excellent Science and Technology Institutions (schools mentioned by 15% or more of respondents)



When you think of excellent science and technology colleges and universities in the United States, which ones come to mind FIRST? (open-ended)

Aided Mentions of Excellent Science and Technology Institutions (schools mentioned by 15% or more of respondents)



Which FIVE of the following schools, if any, do you consider to be academically excellent? (mark up to 5)

Academic Quality: % Top 2 Box

Half or more of alumni, current undergraduates and staff rated S&T a 9 or 10 on quality, but ratings are lower among other audiences. Prospects rate S&T and Mines similarly.

% of Respondents in Top 2 Box (Ratings of 9 or 10)

<u>UG Prospects</u>	<u>GR Prospects</u>	<u>Current UG</u>	<u>Current GR</u>	<u>Faculty</u>	<u>Staff</u>	<u>Alumni</u>
33%	50%	28%	44%	58%	37%	41%
32%	43%	29%	46%	43%	44%	47%
27%	28%	50%	37%	29%	54%	62%
26%	30%	33%	29%	20%	29%	35%
25%	38%	20%	44%	46%	19%	33%
14%	11%	3%	13%	7%	19%	8%
11%	6%	6%	5%	6%	14%	8%

Scale: 1=Average, 10=Excellent, 11=Don't Know ("don't know" responses excluded from calculation of means) / Rate your perception of the academic quality of each of the following schools. Respondents were asked to rate only those schools they had heard of (familiarity>1).

Prospects: Ideal School

Internal: Missouri S&T

	<u>UG Prospects</u>	<u>GR Prospects</u>	<u>Current UG</u>	<u>Current GR</u>	<u>Faculty</u>	<u>Staff</u>	<u>Alumni</u>
#1	U.S./world (67%)	range of S&T (64%)	U.S./world (70%)	U.S./world (66%)	MO/Midwest (55%)	U.S./world (80%)	range of S&T (67%)
#2	skill sets (64%)	skill sets (61%)	range of S&T (68%)	range of S&T (55%)	range of S&T (46%)	socioeconomic (53%)	U.S./world (63%)
#3	majors (63%)	U.S./world (60%)	racial/ethnic (63%)	racial/ethnic (50%)	socioeconomic (41%)	racial/ethnic (50%)	socioeconomic (50%)
#4	racial/ethnic (56%)	racial/ethnic (48%)	MO/Midwest (61%)	skill sets (41%)	U.S./world (40%)	range of S&T (48%)	MO/Midwest (49%)
	socioeconomic (56%)			majors (41%)			
				socioeconomic (41%)			
#5	gender (54%)	majors (47%) socioeconomic (47%)	skill sets (55%)	MO/Midwest (36%)	skill sets (30%)	skill sets (40%)	skill sets (44%)

(Prospects) Which of the following are MOST appealing when you think of the diversity of the college or university you would like to attend? (mark all that apply)
 (Internal) Which of the following come to mind MOST when you think of the diversity of Missouri S&T? (mark all that apply)

Prospects: Ideal School

Internal: Missouri S&T

	<u>UG Prospects</u>	<u>GR Prospects</u>	<u>Current UG</u>	<u>Current GR</u>	<u>Faculty</u>	<u>Staff</u>	<u>Alumni</u>
#1	Able to get jobs (79%)	STEM (75%)	Able to get jobs (89%)	STEM (68%)	Able to get jobs (77%)	STEM (86%)	STEM (90%)
#2	STEM (77%)	Able to get jobs (67%)	STEM (85%)	Able to get jobs (53%)	STEM (76%)	Able to get jobs (76%)	Able to get jobs (82%)
#3	National (69%)	National (65%)	Rigorous (81%)	National (50%)	High-paying jobs (65%)	High-paying jobs (73%)	Rigorous (74%)
#4	High-paying jobs (69%)	Hands-on (62%)	High-paying jobs (80%)	High-paying jobs (49%)	Rigorous (49%)	Rigorous (69%)	High-paying jobs (66%)
					Scores/GPAs (49%)		
#5	Hands-on (67%)	High-paying jobs (60%)	Hands-on (69%)	Hands-on (47%)	Hands-on (48%)	Scores/GPAs (60%)	National (59%)

(Prospects) Which of the following come to mind MOST when you think of schools with a strong academic reputation? (mark all that apply)

(Internal) Which of the following come to mind MOST when you think of the academic reputation of Missouri S&T? (mark all that apply)

Prospects: Ideal School

Internal: Missouri S&T

	<u>UG Prospects</u>	<u>GR Prospects</u>	<u>Current UG</u>	<u>Current GR</u>	<u>Faculty</u>	<u>Staff</u>	<u>Alumni</u>
#1	Innovative (53%)	Innovative (69%)	Smart (67%)	Friendly (39%)	Respected (46%)	Innovative (66%)	Respected (68%)
#2	Friendly (53%)	Respected (63%)	Innovative (53%)	Respected (38%)	Established (35%)	Smart (56%)	Established (52%)
#3	Respected (48%)	Accessible (43%)	Respected (52%)	Welcoming (38%)	Serious (35%)	Respected (56%)	Smart (47%)
							Innovative (47%)
#4	Welcoming (44%)	Established (36%)	Established (40%)	Innovative (37%)	Friendly (34%)	Established (51%)	Serious (39%)
					Innovative (34%)		
#5	Connected (42%)	Connected (35%)	Serious (37%)	Established (36%)	Smart (29%)	Serious (36%)	Accessible (30%)
					Accessible (29%)		

(Prospects) Which FIVE of the following words BEST describe the type of college or university you would most like to attend? (mark up to 5)

(Internal) Which FIVE of the following words come to mind when you think of Missouri S&T? (mark up to 5)

UG Prospects

GR Prospects

Vital Skills:

We're known for engineering. But we're more than just an engineering school. We take the principles of engineering—analytical logic, a pragmatic approach, a desire to dig in, work hard and make things real—and infuse them into every field of study. It means students will be armed and ready with the real-world problem-solving skills they need to succeed in any career that exists, and many more that don't exist yet.

31%

53%

Technology-focused

Technology is advancing at a rapid pace—and today's businesses need people who can keep up. STEM programs are the backbone of our school, and we bring their principles into all of our programs because there's no use for yesterday's thinking in tomorrow's careers. So no matter what students study here, they leave with the technological, cognitive, and personal skills they'll apply to their careers, no matter where they take them.

25%

28%

Clear Sense of Direction

This is a small community of intelligent, dedicated people who know who they are and get what they want out of their lives, their careers, and their education. Whatever students are into, they'll get even more into it here. Every deliberate step students take will lead them down deliberate, thoughtful paths, and every smart decision they make will bring them closer to achieving their life goals.

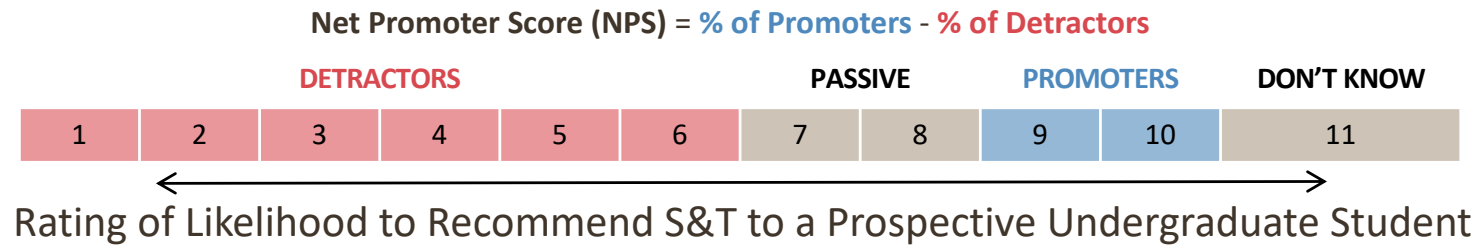
39%

14%

Which one best describes the school you would like to attend? (mark one) *Columns do not total 100% because "none of the above" was also an option.*

	Prospects: Desired School		Internal: S&T Today					Internal: S&T in the Future				
	UG Prospects	GR Prospects	Current UG	Current GR	Faculty	Staff	Alumni	Current UG	Current GR	Faculty	Staff	Alumni
#1	Clear sense of direction (39%)	Vital skills (53%)	Vital skills (38%)	Vital skills (41%)	Vital skills (44%)	Vital skills (48%)	Vital skills (56%)	Vital skills (39%)	Vital skills (43%)	Vital skills (43%)	Vital skills (46%)	Vital skills (53%)
#2	Vital skills (31%)	Technology focused (28%)	Clear sense of direction (31%)	Technology focused (27%)	Technology focused (20%)	Technology focused (25%)	Technology focused (22%)	Technology focused (36%)	Technology focused (37%)	Technology focused (30%)	Technology focused (35%)	Technology focused (32%)
					Clear sense of direction (20%)							
#3	Technology focused (25%)	Clear sense of direction (14%)	Technology focused (25%)	Clear sense of direction (22%)		Clear sense of direction (21%)	Clear sense of direction (18%)	Clear sense of direction (22%)	Clear sense of direction (13%)	Clear sense of direction (16%)	Clear sense of direction (13%)	Clear sense of direction (12%)

(Prospects) Which one best describes the school you would like to attend? / (Internal) Which one of the following do you believe BEST describes Missouri S&T today? (mark one) / Which one of the following do you believe BEST describes what Missouri S&T should be known for in the future? (mark one)



Audience	Detractors	Passive	Promoters	Don't Know	NPS Score
Current UG	13%	33%	54%	0%	41
Current GR	18%	34%	42%	6%	24
Faculty	16%	29%	54%	1%	37
Staff	11%	28%	58%	3%	47
Alumni	7%	22%	71%	1%	64

Percentages rounded to nearest whole percent

Rate the extent to which you would recommend Missouri S&T to a prospective undergraduate student.
 Scale: 1=Not at all likely, 10=Extremely likely, 11=Don't Know ("Don't know" excluded from calculation of mean ratings)

Positioning vs. Tagline

POSITIONING

Internal

Express business purpose

Grounded and truthful

Permanent

Known and lived by employees

Guides all business decisions

TAGLINE

External

Express customer benefits

Catchy and copy written

Changeable

Known and remembered by customers

Influences buyer behavior

Positioning vs. Tagline

	POSITIONING	TAGLINE
Apple	Humanizing technology	Think Different
Nike	Genuine athletic performance	Just Do It
Volvo	Safety	For Life
Disney	Make people happy	Where dreams come true
Target	Style on a budget	Expect more. Play less.

ESSENCE

Because the brand essence articulates what we stand for, it must be compelling, authentic, focused and meaningful. It becomes the filter for everything we say and do.

ATTRIBUTES

(what we offer)

MISSOURI S&T...

Builds upon a heritage of discovery, creativity and innovation across all academic and research disciplines

BENEFITS

(what they get)

SO THAT OUR COMMUNITY IS...

Inspired and ready to pursue and solve the world's great challenges.

Market Research: Measure and Refine



Measuring Impact

Marketing costs are difficult to control since the expenditures usually go toward marketing programs and communications that have unpredictable longer-term impact.

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Marketers sometimes suffer from a lack of credibility inside companies because the effect of their marketing activities on earnings is not always easy to measure

You can't manage what you can't measure

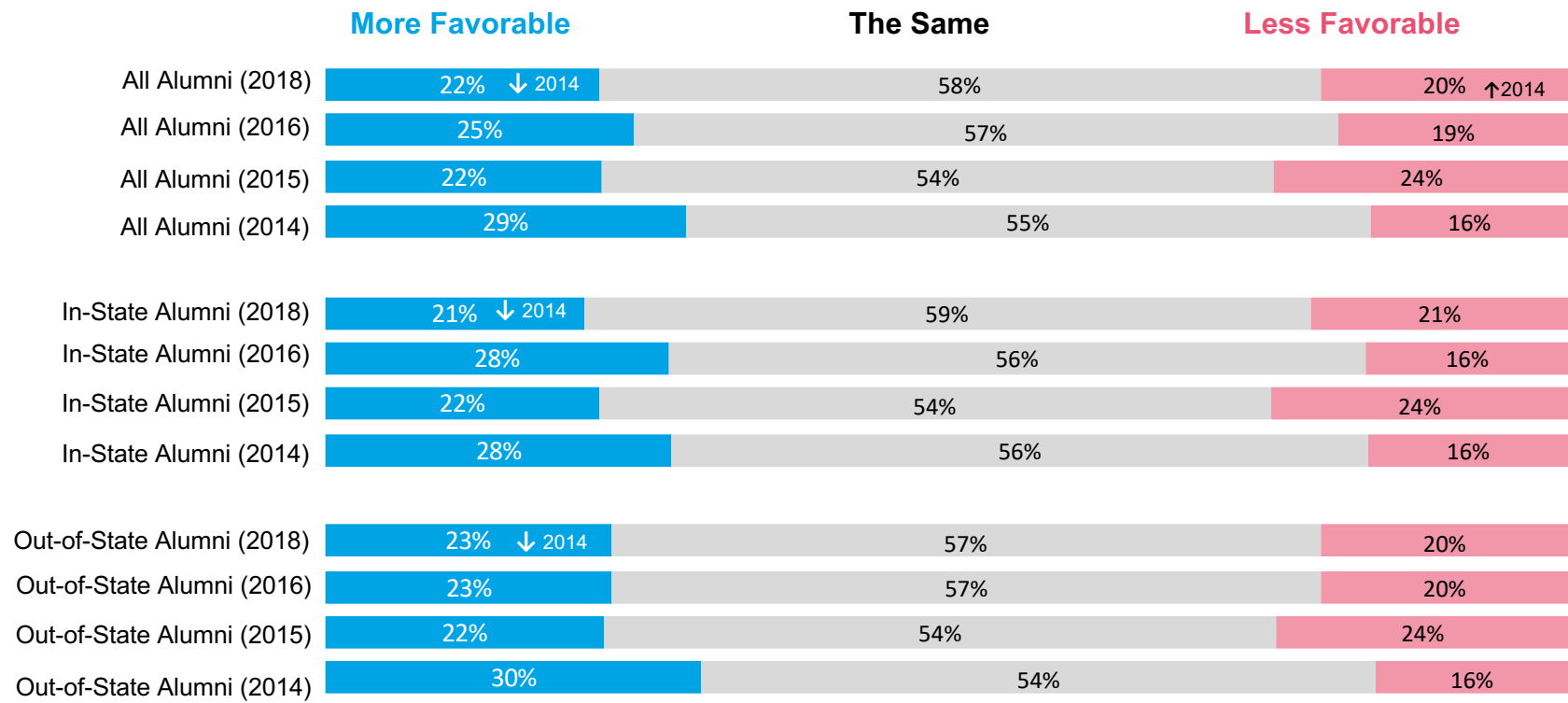
BRAND EQUITY MEASUREMENTS

Prospects (Inquirers and Suspects)

		Central Indiana	Indiana	Chicagoland	Midwest	TOTAL
Excellent Schools (% selected)	2014	63%	61%	16%	21%	40%
	2016	68%	62%	17%	21%	42%
	2018	70%	65%	19%	26%	45%
	<i>Significance</i>	0.44	0.71	0.74	0.01	
	% Change 2014-2018	11%	7%	19%	24%	15%
	%Change 2016-2018	3%	5%	12%	24%	11%
	Goal	10%	10%	10%	10%	10%
Familiarity (% somewhat/very)	2014	85%	79%	51%	38%	63%
	2016	94%	87%	46%	42%	67%
	2018	89%	84%	51%	49%	68%
	<i>Significance</i>	0.07	0.04	0.52	0.00	
	% Change 2014-2018	5%	6%	0%	29%	10%
	%Change 2016-2018	-5%	-3%	11%	2%	1%
	Goal	4%	5%	10%	10%	7%
Considering (% selected)	2014	32%	33%	19%	14%	24%
	2016	40%	36%	13%	13%	26%
	2018	39%	35%	12%	17%	26%
	<i>Significance</i>	0.32	0.61	0.191	0.04	
	% Change 2014-2018	22%	6%	-37%	21%	3%
	%Change 2016-2018	-3%	-3%	-8%	31%	4%
	Goal	10%	10%	10%	10%	10%
Quality (% 9 or 10)	2014	42%	39%	18%	11%	28%
	2016	38%	32%	8%	8%	22%
	2018	47%	38%	23%	11%	30%
	<i>Significance</i>	0.41	0.08	0.02	0.03	
	% Change 2014-2018	12%	-3%	28%	0%	9%
	%Change 2016-2018	24%	19%	188%	38%	67%
	Goal	10%	10%	10%	10%	10%

2018, 2016, 2015, and 2014 data

Change in Overall Opinion

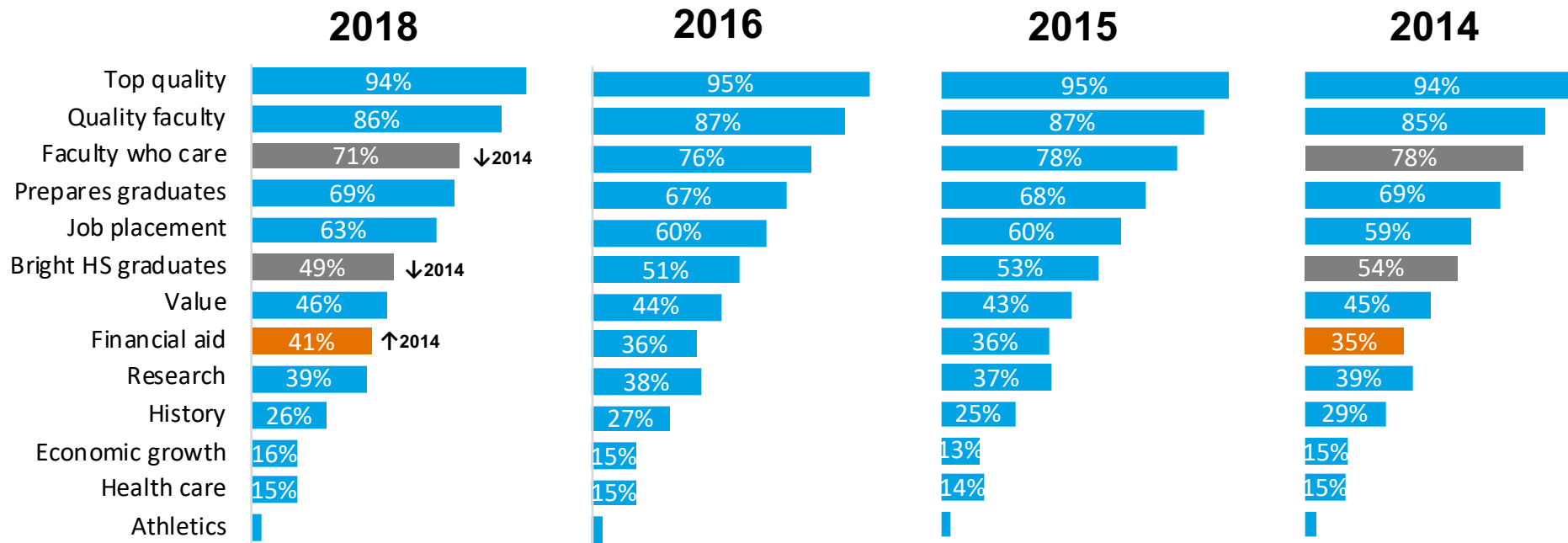


The percentage of alumni who selected “more favorable” has decreased significantly since 2014.

Arrows indicate a significant increase or decrease from years 2016 or 2014 only. (95% confidence level).

Important Attributes of BEST Universities

To what extent do you feel each of these attributes is an important component of the BEST universities in our nation?



5 Rating – Extremely Important Component

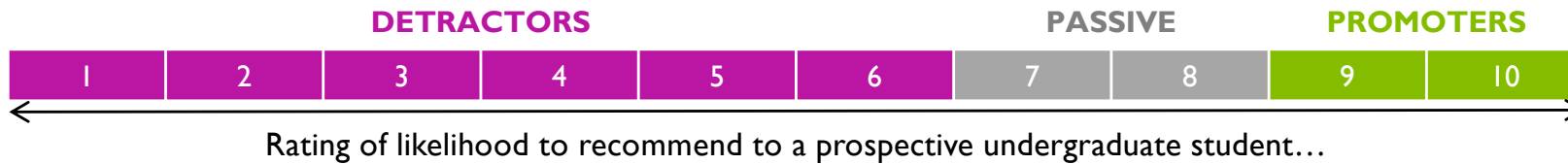
Findings are very consistent over the four waves of data. Over three quarters of alumni said top quality, quality faculty, and faculty who care are extremely important components of the BEST universities in our nation.

Scale: 1=Not an important component at all, 5=Extremely important component. Percentages calculated without “don’t know” in the base.

Sorted in descending order by 2018, Extremely important rating only. Labels removed from sections with less than 5%

Arrows indicate a significant increase or decrease from years 2016 or 2014 only (95% confidence level).

Net Promoter Score (NPS) = % of Promoters - % of Detractors



		% Don't Know	% Detractors	% Passive	% Promoters	NPS
UG Students	2017	0%	11%	30%	58%	47
	2014	1%	15%	35%	50%	34
Grad Students	2017	17%	14%	26%	42%	28
	2014	14%	22%	32%	33%	12
Faculty	2017	5%	12%	28%	55%	43
	2014	2%	15%	35%	49%	34
Staff	2017	3%	14%	29%	54%	40
	2014	2%	17%	32%	50%	33
Alumni	2017	4%	9%	20%	67%	58
	2014	3%	12%	26%	59%	46

Rise in NPS scores due to both a decrease in detractors and an increase in promoters

(Replication) Rate the extent to which you would recommend to each of the following:

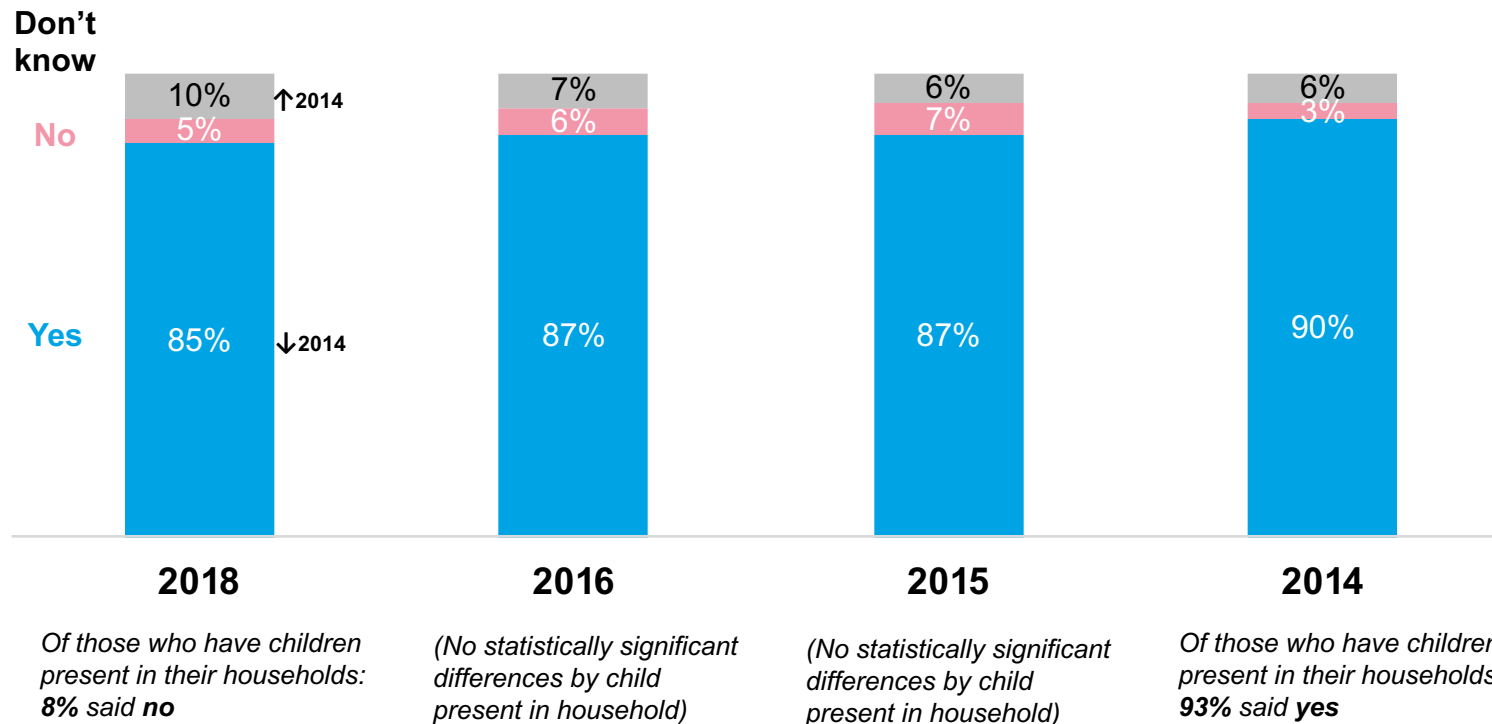
Scale: 1=not at all likely/10=extremely likely, 11=don't know

NPS=% promoters - % detractors where promoter = % 9 or 10, Detractor = %1-6, and Passive = %7 or 8

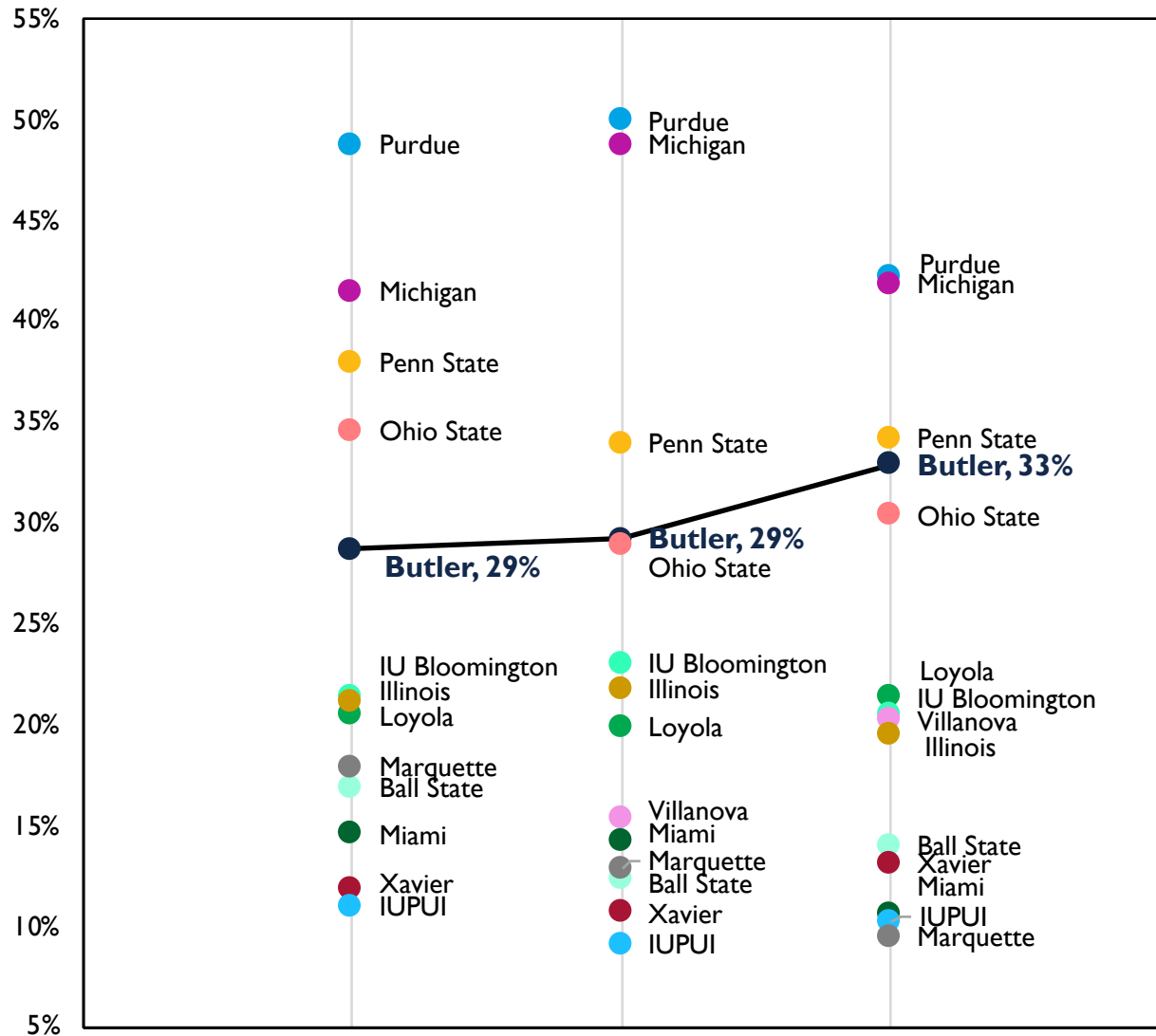
Encouraging Child To Consider

If you had a son or daughter who was applying to college, would you recommend that they consider X as a top choice?

The percentage of alumni who would recommend X to their child has been trending downward since 2014.



Arrows indicate a significant increase or decrease from years 2016 or 2014 only (95% confidence level).

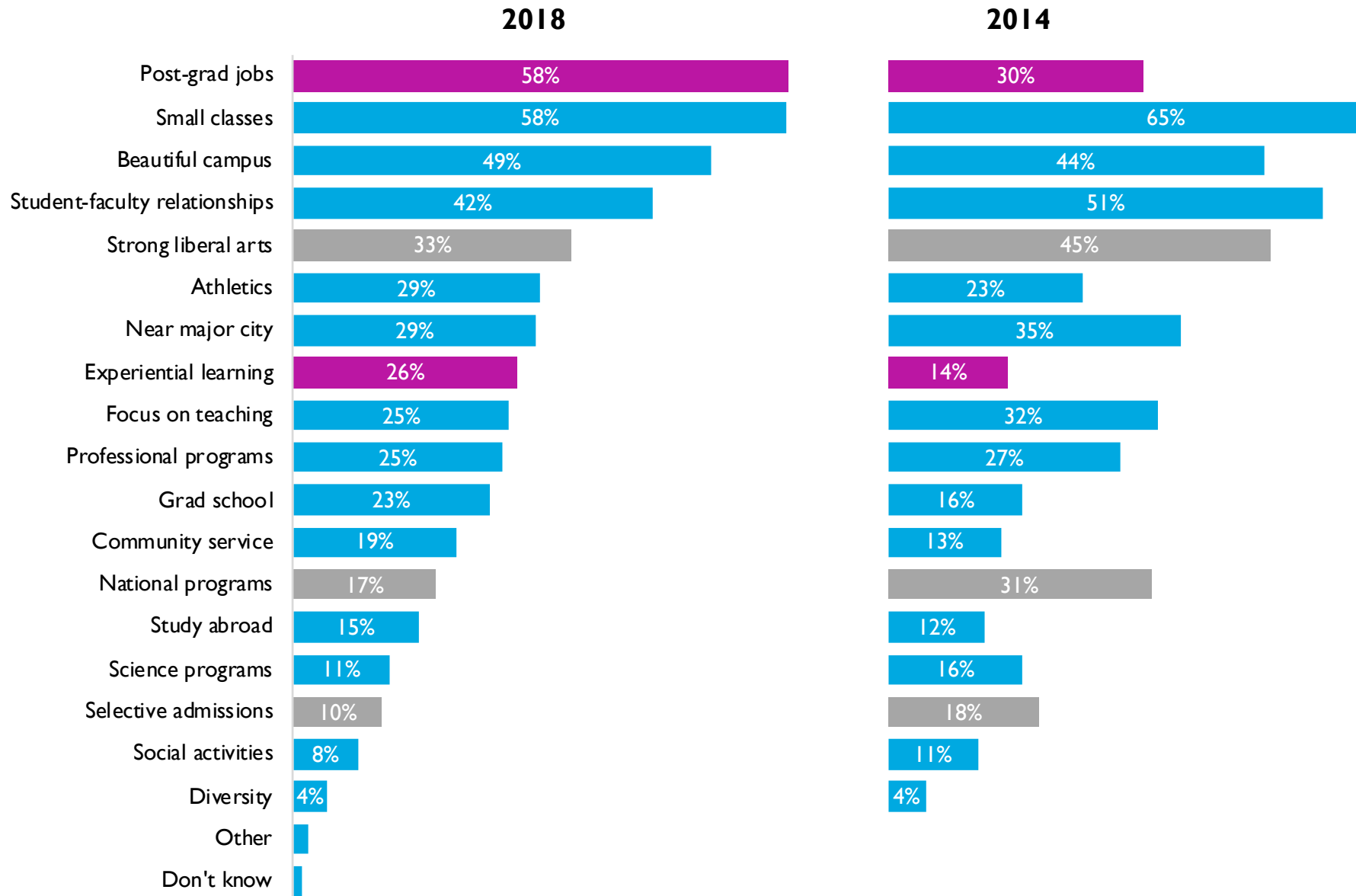


The following were selected by less than 10% of prospects in 2018:

- Wake Forest (8%)
- DePauw (7%)
- Drake (6%)
- Saint Louis (6%)
- Dayton (5%)
- Creighton (4%)

8% of 2018 prospects selected "None of the above"

When you think of excellent colleges and universities, which FIVE of the following schools, if any, come to mind first? (select up to 5)
Schools not selected by at least 10% of 2018 prospects are not displayed on chart.



Which FIVE of the following attributes BEST describe University? (select up to 5)
 Purple/gray bars indicate a statistically significant difference from the previous year.

Final Thoughts

Barriers to Success

Lack of understanding or appreciation for basic marketing & branding principles

Lack of financial commitment to the marketing function

Arguments that marketing cheapens the academy

Organizational structure that doesn't support integration

Arguments that schools are too different to support a common strategy

Fear among campus marketers that budgets and staffs will be lost as a result of integration

The desire for buy-in will slow you down; finding the balance can be very difficult

Why It's So Hard

Your brand has to represent “truths” about your institution AND be compelling to your target audiences

Developing your brand takes time ... and money

Developing your brand requires your entire campus to agree on and support the strategy

Your brand has to be “institutionalized” and influence decision-making in seemingly unrelated areas

Developing your brand requires integrated marketing

Embracing a positioning means leaving attributes “off the table”

Our Industry Is Evolving

The emergence of the CMO is the biggest change in the high ed administration in 10 years

Budgets are increasing, teams are growing

We are becoming more adaptable to new technologies

Our campuses are adopting our language

Our efforts to embrace measurement and ROI are taking root

Experienced professionals are moving into higher ed and bringing new thinking

External pressures and public opinion are forcing marketing as a priority

Recommended Reading

The iGen Shift: Colleges Are Changing to Reach the Next Generation

<https://www.nytimes.com/2018/08/02/education/learning/generationz-igen-students-colleges.html>

Planning for Marketing Without a Budget

<https://www.simpsonscarborough.com/planning-for-marketing-without-a-budget-2/>

Higher Ed's Existence is Not a Marketing Strategy

<https://www.simpsonscarborough.com/higher-eds-existence-is-not-a-marketing-strategy/>

Is Your Brand Working? A Checklist for Assessing Its Endurance

<https://www.simpsonscarborough.com/is-your-brand-working-a-checklist-for-assessing-its-endurance/>

Breaking Brand: Challenging the Status Quo to Stand Out from the Pack

<https://www.simpsonscarborough.com/breaking-brand-challenging-the-status-quo-to-stand-out-from-the-pack/>

Marketing Influences Everything

<https://www.insidehighered.com/blogs/call-action-marketing-and-communications-higher-education/marketing-influences-everything>

Marketing the Why in Higher Education

<https://www.insidehighered.com/blogs/call-action-marketing-and-communications-higher-education/marketing-why-higher-education>

The Strongest Case for Institutional Brand-Building: a President's-Eye View

<https://www.insidehighered.com/blogs/call-action-marketing-and-communications-higher-education/strongest-case-institutional-brand>



Thank you.

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