

HIGHER ED MARKETERS ROUNDUP: THE STATE OF HIGH SCHOOL ADVERTISING IN 2020



Higher education marketers can deliver results with a pandemic-optimized digital strategy

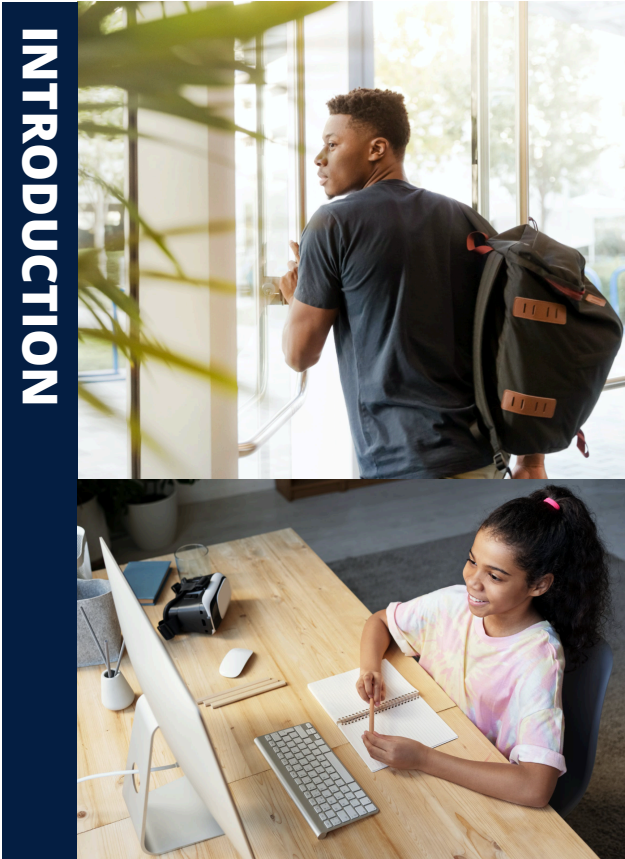
By Matt Diteljan, CEO & Co-Founder, Glacier

As the COVID-19 pandemic wears on, higher education institutions navigate uncharted territory alongside their key stakeholders, including prospective students. With changes to the student experience and the need to offer new, online course delivery models, higher education institutions are learning and responding faster than ever. Likewise, marketers must pivot and adapt quickly to ensure prospective high schoolers are converted into tuition-paying students, keeping bottom lines - and school spirits - healthy. Glacier surveyed higher education marketing professionals to uncover what's changed, what matters now and how they're optimizing digital media to succeed in the age of COVID-19.

Glacier looked at their teams, budgets, goals, challenges and how they leverage specific social media platforms and integrate with analog tools as to gain insight into their optimization processes.

Glacier learned that marketers must quickly adapt their strategies for 2020 and beyond to include or focus more on digital paid media; fine tuning their presence on digital channels in response to performance metrics is critical.

Most importantly, the survey confirmed that strategic and responsive digital media spend is marketing's best defence in protecting their institutions against the varied, ongoing and novel challenges the pandemic presents. Failure to plan for a digital recruitment reality is an almost sure way to fall short of targets, and impact the organization's bottom line in the already challenging environment of the COVID-19 pandemic.





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THE IMPACT OF COVID-19

COVID-19 has changed the way higher education marketers are spending their media dollars and reaching high school students.

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ADVERTISING TO HIGH SCHOOL STUDENTS

A breakdown of all paid media channels, yearly goals and in-person events and how higher ed marketers are managing digital competition.

3

MISSED OPPORTUNITIES

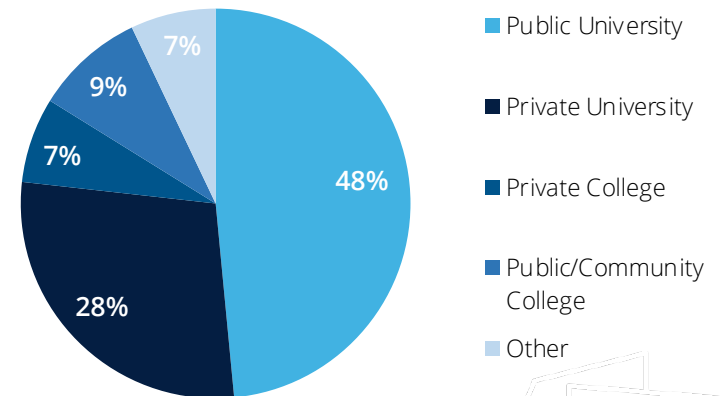
The biggest “missed opportunities” based on our research of where high school students are consuming media and how higher ed marketers are actually deploying their budgets.

METHODOLOGY

In the third quarter of 2020, Glacier surveyed 187 professional marketers at North American higher education institutions to gather a baseline understanding of their organization, the challenges their teams face and how the pandemic has impacted the social media and traditional marketing tools they’re leveraging today.

Of 160 respondents, 72% hold a title of Marketing Manager or more senior. They represent a wide range of marketing budgets, varying social media channel performance and diverse target audiences. All respondents report using social media channels as critical components of their marketing budget.

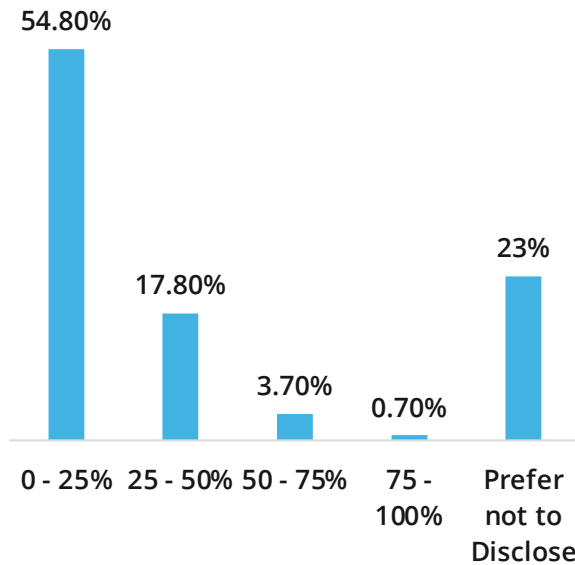
SURVEYED INSTITUTIONS



BUDGET CUTS

About half of respondents are experiencing marketing budget cuts of up to 25%. About 17% report reductions of up to 50%, and - incredibly - three per cent report budgets that are up to 75% smaller this year. A fortunate 15% report their budgets are the same as last year. Across the board, the challenge to marketers is to do the same or better, while mitigating the impact of the pandemic with the same or smaller budget as in years past.

BUDGET CUTS



LAYOFFS

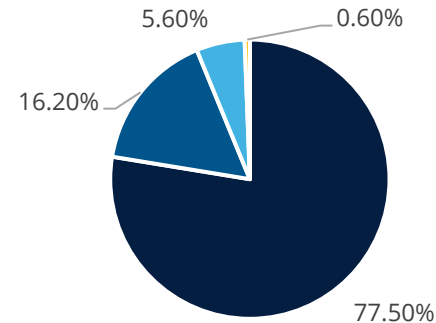
Marketers may also be challenged to adapt to smaller team sizes, as **21%** of respondents report layoffs in their department.

MODEL FOR FALL 2020

77% of higher education institutions will be proceeding with a hybrid model, blending online services with in-person opportunities. 16% will move forward with fully online/virtual programs, while 5% will be back on campus with normal operations. The remaining 2% are still determining what model best fits their institution, but clarify that staff will only return on a voluntary basis.

“55% OF MARKETERS EXPERIENCED BUDGET CUTS OF UP TO 25%”

MODEL FOR FALL 2020

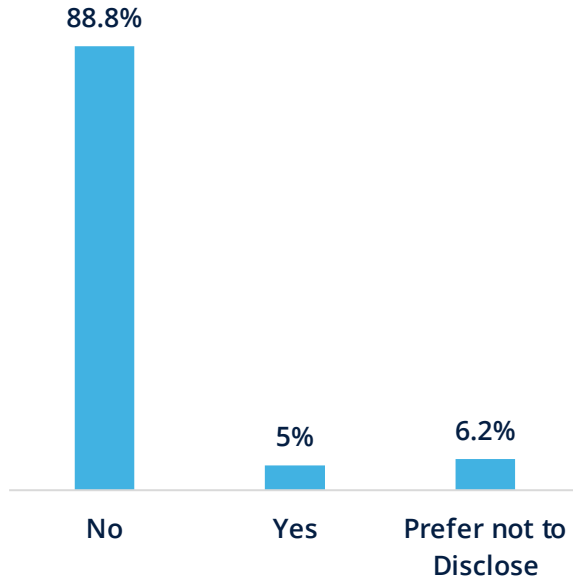


- Hybrid
- 100% Virtual
- 100% On Campus
- Other

RISK OF CLOSURE

While 88% of respondents are confident in their organization's ability to survive the pandemic, five per cent indicate concern that their organization may close as a result of it. Simultaneously, when asked about 2020 marketing plans, five per cent of respondents report an approach that does not include any digital engagement, or a 100% analog approach to recruitment marketing.

RISK OF CLOSURE

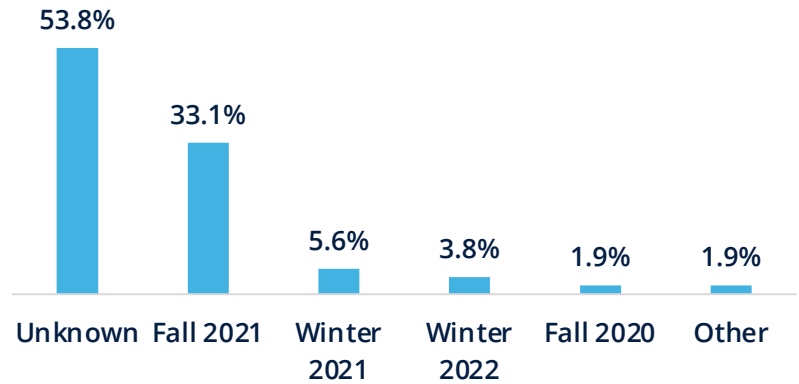


"BACK TO NORMAL"

Respondents indicated their anticipated 'return to normal' was generally unknown (53%), with 33% indicating that it would come in the fall of 2021 and 8% projecting it would be in the winter of 2021 or later.

53% OF MARKETERS ARE UNSURE OF WHEN THEY WILL "RETURN TO NORMAL"

BACK TO NORMAL

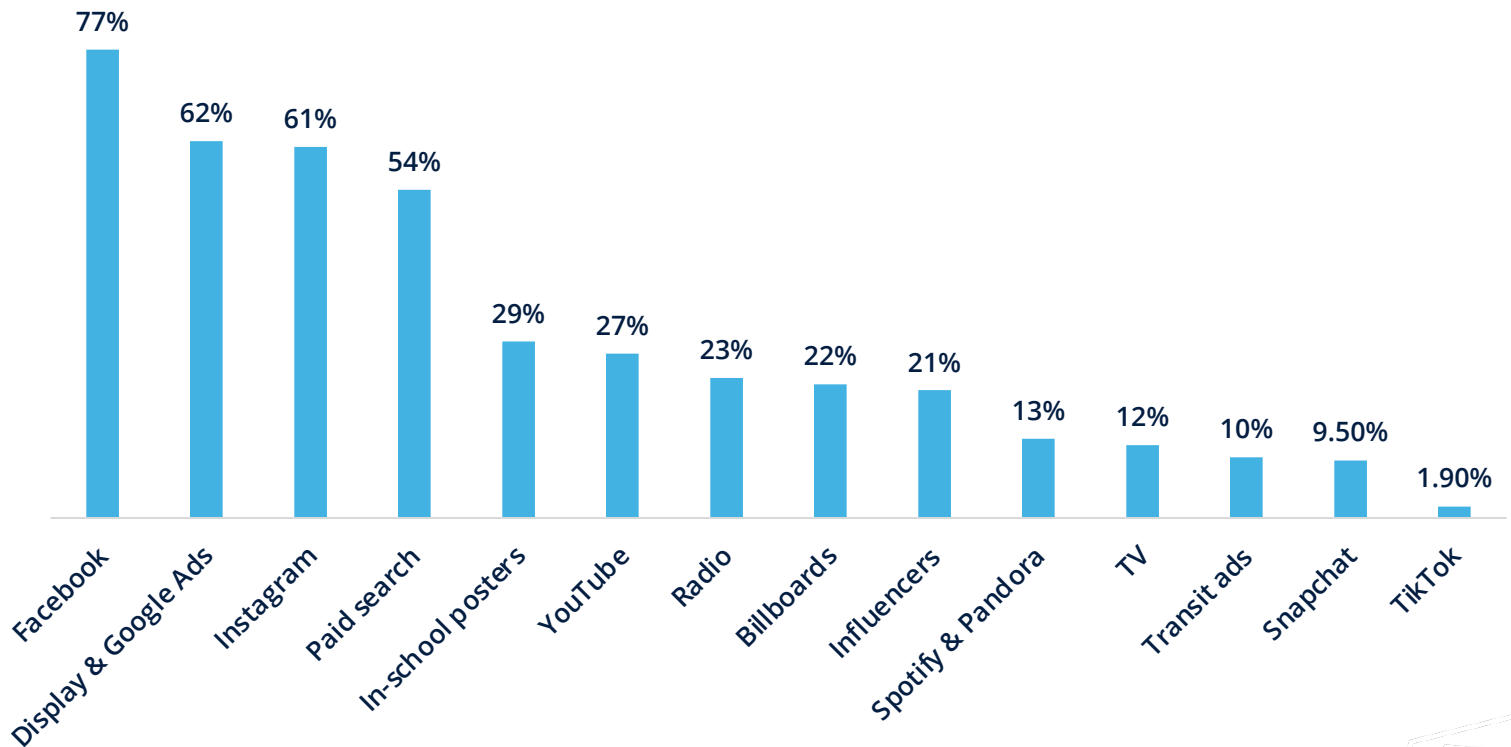


PAID MEDIA BREAKDOWN

Glacier looked at how marketers used social media, digital advertising, traditional media and print advertising before the onset of the pandemic, how they adjusted as a result and the overall effectiveness of each channel.

The top performing channel, TikTok at 86% reported effectiveness, is also the most underutilized channel at only 1.9%, indicating a very promising competitive advantage for savvy marketers who can leverage it. The second most effective channel is paid search advertising, at 76% effectiveness and only 54% use amongst respondents. Rounding out the top three performing channels is digital display and Google ads at 74% reported effectiveness, and a use rate of only 62%.

OVERALL PAID MEDIA USAGE



PAID MEDIA BREAKDOWN

The most underutilized channels (aside from TikTok mentioned above) are Snapchat at 9.5% with high an effectiveness rating of 64%, Spotify and Pandora at 13% use with effectiveness of 66%. It's possible that the TikTok and Snapchat channels are underutilized because of their relative newness compared to established social media channels like Facebook and Instagram. It's clear that marketers are turning more to Snapchat (60%) which may have more credibility and be better understood by marketers than TikTok, which no respondent increased their use of during the pandemic.

In terms of physical media, like transit ads, billboards and in-school posters, all of these were used minimally before the pandemic and saw only modest increases during the pandemic (22% for billboards and 10% for transit ads) while the use of in-school posters diminished by 22%, likely as a result of lock down measures that saw schools close for a period of time in the Spring of 2020.

WE see 2 key statistics that identify the increase or decrease in usage the app has seen during COVID-19, and the effectiveness of the channel in reaching target audiences as reported by higher education institutions.



PAID MEDIA MATRIX

	Change during COVID-19	Reported Effectiveness
Snapchat	+60%	64%
Spotify & Pandora	+40%	66%
Digital display & Google Ads	+37%	74%
Paid search	+35%	76%
YouTube	+35%	68%
Facebook	+34%	70%
Instagram	+34%	64%
Influencers	+33%	70%
Billboards	+28%	58%
TV	+21%	60%
Radio	+ 19%	60%
Transit ads	+ 12.5%	56%
TikTok	0%	86%
In-school posters	- 22%	62%

YEARLY GOALS

Respondents to the survey indicated that their goals for the year included maintaining current numbers (60%), setting up for next year (56%), mitigating the impact of COVID-19 on their current marketing plans and targets (32%), and one respondent wrote in that they hoped to continue growing enrollment this year.

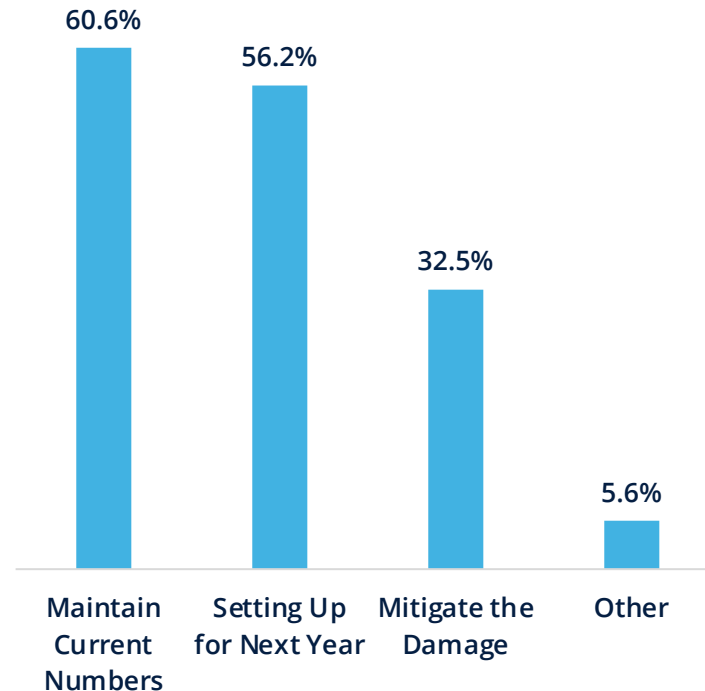
In addition to how marketers fine tune their approach to their digital channels, they must also consider the degree to which they'd adapt their strategy to an optimized mix of analog and digital components as a truly 'hybrid' strategy.

Overall, marketers are faced with a decision that is generally about how much they will integrate analog marketing tactics (in-school advertising or events, for example) with digital tactics (like student influencer marketing).

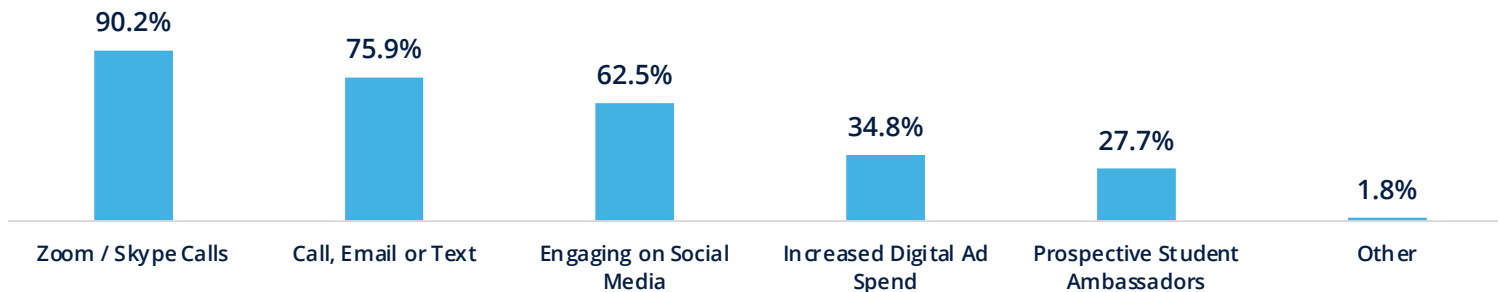
EVENTS & RECRUITERS

About 90% of respondents reported plans to significantly decrease in-person student events during the pandemic, and 57% of respondents reported that they would leverage opportunity to send marketers in to schools significantly less this year. They indicated that they'd make up for the absence of this tried-and-true strategies with Zoom events (90%), one-on-one correspondence by text, call or email (75%), engaging on social media (62%), increasing digital ad spend (34%) and leveraging students as in-person ambassadors (27%).

YEARLY GOALS



HOW ARE YOU MAKING UP FOR A LACK OF RECRUITERS?



MANAGING DIGITAL COMPETITION

While the majority of respondents are keeping the status quo of their domestic and in-state or in-province marketing initiatives during the pandemic, they are making changes to mitigate competition from other post-secondaries with increased budget allocation to:

- ***Shift their messaging (41%).***
- ***Increase digital media spend (30%).***
- ***Expanded into new regions (25%).***

RECRUITMENT

Marketers are looking to virtual events and increased spend on digital advertising and social media campaigns to meet their targets and goals this year. Marketers can look to meet and exceed their goals during the pandemic by selecting a strategic partner to help them create and execute a pandemic-optimized marketing strategy that considers how to:

- ***Continuously evaluate and fine tune social media spend and presence on channels that provide the best value for engagement and cost.***
- ***Minimize the impact of cuts to budgets and reduced resources.***
- ***Effectively integrate analog and digital recruiting tools.***
- ***Fine tune their digital presence and optimize budgets for digital engagement.***
- ***Leverage in-school opportunities to advertise and influence prospective students.***



PREVIOUS RESEARCH

Academica Group and Glacier surveyed 1,397 high school students in January 2020, exploring high school students' usage of marketing and branding resources for postsecondary institutions. Combining those insights with the data collected from higher education marketers allows us to identify opportunities that are not being utilized at a commensurate rate.

[Download the whitepaper here.](#)

SOCIAL MEDIA USAGE BY PLATFORM AND GRADE

*Via Academica whitepaper

	GRADE 10	GRADE 11	GRADE 12
INSTAGRAM	95%	95%	96%
YOUTUBE	87%	87%	88%
SNAPCHAT	78%	83%	84%
TIKTOK	66%	67%	60%
SPOTIFY	64%	62%	64%
FACEBOOK	31%	34%	47%

VIDEO CONTENT

A major opportunity lies within the development of high-quality video content. Video content opens the door to new ad formats and platforms, along with repurposing content for strategic media placement on Instagram, Snapchat, TikTok and YouTube. Video advertisements also produce significantly better engagement than static ads.

SNAPCHAT

81% of high school students use Snapchat, however only 9.5% of higher education marketers are currently utilizing Snapchat ads.

Snapchat allows you to maximize outreach under the restraints of a limited budget. Marketers can optimize campaigns similar to Facebook or Instagram campaigns, while setting specific campaign goals focused on awareness. Snapchat also has a robust selection of advertisement formats such as single image, carousel video ads and augmented reality filters. In a digital era, these creative and unique formats can help campaigns stand above the competition.

INSTAGRAM

96% of high school students use Instagram, yet only 61% of higher education marketers use it to engage this audience. Instagram offers different forms of media, robust audience targeting, remarketing and much more. Marketers must be on this platform if they want to successfully reach high school students.

TIKTOK

64% of high school students use TikTok, compared to only 1.9% of higher education marketers using TikTok ads. With the apps growing popularity, this is a significant opportunity.

TikTok is a fully immersive platform that allows advertisers to connect to their audience through creativity and trends at an unparalleled rate. Unique engagement solutions and fully customizable formats promote creative and authentic engagement with an infinite number of audiences.

Marketers can team up with current students and faculty to generate content in a budget friendly manner.

YOUTUBE

87% of high school students are active on YouTube, yet only 27% of higher education marketers include it in their marketing strategy. YouTube's vast reach and powerful targeting capabilities make it one of the most valuable platforms in marketing. YouTube offers a range of media opportunities such as skippable and non-skippable in-stream ads, video discovery/recommendation ads, and overlays or banners on the site.

INFLUENCERS

While only 21% of higher education marketers are using influencers to reach high school students, 51% of students consider alumni and current students the most trustworthy source of information when researching an institution. Influencers could be high school students acting as brand ambassadors, current students, or alumni. Producing authentic content with an established personality is a key way for an institution to bolster their online presence.

SPOTIFY

63% of high school students use Spotify, while only 13% of higher education marketers are using it to spread their message. In comparison, 23% of marketers are still using traditional radio ads, despite it having the lowest ad recall among all other forms of media. It is vital for marketers looking to engage audiences through audio platforms to focus on modern streaming channels such as Spotify. With ad space on the platform available for purchase programmatically, marketers have robust targeting options that include audience customization and remarketing.

FACEBOOK

Only 37% of high school students still use Facebook compared to 77% of higher education marketers. Simply put, this is wasted media spend. Marketers are spending the most money on this platform despite being limited to just 37% of their target audience. Campaigns must rethink Facebook spend and adjust to more popular channels, such as Instagram, Snapchat, TikTok and YouTube.

**37% OF HIGH SCHOOL STUDENTS
STILL USE FACEBOOK COMPARED TO
77% OF HIGHER ED MARKETERS**





TAKE ACTION

TO LEARN MORE ABOUT WHAT IS WORKING (AND WHAT ISN'T), TALK TO GLACIER TODAY



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