LEGEND LABS

HIGHER EDUCATION'S ACCELERATED EVOLUTION

A LANDSCAPE ANALYSIS TO
INFORM BRAND, COMMUNICATIONS,
AND REPUTATION IMPERATIVES

THE EVOLVING LANDSCAPE OF HIGHER EDUCATION

The past 18 months have been arguably the most impactful of the 21st century in the evolution of the higher education landscape. A global pandemic has reshaped the delivery of education while societal issues have challenged institutions' role in fostering discussion and discourse.

At this inflection point in the landscape's evolution, effective communications and marketing are paramount. A reevaluation of objectives, stakeholder relationships, engagement strategies, and the role of data and analytics in promoting and protecting institutional brands now sits atop the to-do list of senior most leaders at colleges and universities across the country.

In this analysis, a starting point for leaders embarking on such evaluations, we dissect key trends in higher education over the last 12-18 months through the lens of data and analytics, leveraging digital listening technologies and consumer data to evaluate two key questions:

1. **What do we know?**
2. **What can we do about it?**

CONTENTS:

TREND 1

STRENUOUS GOVERNANCE ROLES

University campuses, long considered microcosms of American society, have experienced growing tensions and unfamiliar challenges in the wake of a global pandemic and social justice reckoning. Institutional leadership has attempted to balance and triage a multitude of constituent interests, often conflicting, and in many cases have been forced to make decisions before all the information is available. This changing landscape has necessitated increased levels of communication, transparency, and tact from university leadership, whose governance decisions and institutional strategies are under the national spotlight, now more than ever.

I. PRESIDENTS

1. This growing spotlight on higher education has resulted in increased scrutiny of university leadership. Campus stakeholders are looking to their leaders for guidance while demanding heightened transparency.

ONLINE CONVERSATION VOLUME: PRESIDENTS + VULNERABILITIES[2]
5/1/20-6/31/21 VS. PREVIOUS PERIOD

Mentions featuring keywords related to both institutional vulnerabilities and university presidents/chancellors.[1]
5/1/20-6/31/21

624K	**431K**	**1.1B**
TOTAL UNIQUE MENTIONS	TOTAL RETWEETS	TOTAL REACH
▲ 13%	▲ 24%	▲ 1%

* FROM PREVIOUS PERIOD

Cost of Attendance ▲10%
Discrimination ▲102%
Free Speech ▲18%
Campus Safety ▲2%
Litigation ▲29%
Mental Health ▲21%
Enrollment ▲3%
Buildings & Monuments ▲104%

0   20k   40k   60k

Campus stakeholders' reliance on guidance from leadership has added pressure and volatility to the level of confidence these groups have in their respective leaders.

LOOKING TO LEADERSHIP FOR HEALTH-RELATED GUIDANCE[3]

41%

of students are looking to their school administration first for information on the vaccine.

SCRUTINIZING LEADERSHIPS PANDEMIC RESPONSE[4]

51%

of students say that the way their institution has handled the pandemic has made them **trust** its leadership less.

LEADERSHIP HAVE FELT THESE CONSEQUENCES[5]

The University of Michigan Faculty Senate voted **no confidence** in President Mark Schlissel on Sept. 16.

Faculty said the administration had not been **transparent** regarding reopening decisions.

1. Source: Legend Labs Brandwatch analysis | Mentions of University Presidents
2. Source: Legend Labs Brandwatch analysis | (Query: Canary) Mentions of University Presidents + Canary higher education vulnerabilities
3. Source: New America & Third Way Higher Ed Tracking Survey
4. Source: John Gerzema & Will Johnson, Harris Poll
5. Source: Inside Higher Ed

2. University leadership has been under increased pressure from both students and faculty to engage in and address national discussions. These calls for action are, at times, contradictory to the opinions and interests of state legislators and other key stakeholders, as we will touch on later in the report. Related actions from leadership have been met with mixed sentiment, largely shaped by perception of authenticity and institutional consistency in messaging.

IHE SURVEY OF 433 HIGHER EDUCATION PRESIDENTS[6]

How important has it been for your institution to address issues around race during the 2020-21 academic year as compared to previous years?

Somewhat/much less important	About the same	Somewhat more important	Much more important

15%	40%	45%
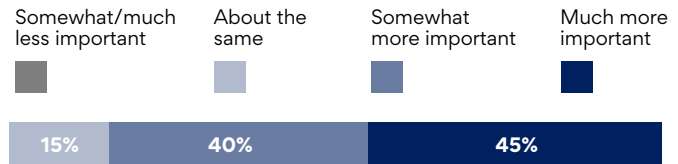
An analysis of 10 Universities' responses to the George Floyd murder found that **80%** of institutions had inconsistent messaging across campus and **60%** were heavily criticized for communicating inauthentically, often resulting in backlash from stakeholders.[7]

Washington Examiner | Jun 28, 2021 ✓ [8]

@UCBerkeley administrator defends exceptionally tone-deaf George Floyd statement.

"I'm sorry that our desire to acknowledge and empathize with what folks are feeling rubs you the wrong way."

Student activism on campus has drawn national coverage, resulting in increased attention on institutions in the context of key issues and discussions.

Coverage of student protests and activism (1/1/20 – 7/1/21)[9]

562K Mentions **823K** Retweets **698M** Total Reach

108K Mentions

3. Increased focus on societal issues has presented an opportunity for many leaders to build thought leadership platforms, elevating their individual brands as well as that of the institutions they represent.

Strategy 1: Thought leadership with op-eds[10]

Sample analysis of university president op-eds:

139.6K Total engagements **17.5K** Average engagements

Example:

Author: CSU President Tony Frank

Op-ed: THE DENVER POST

Student mental health and well-being is a critical issue on every campus in the country

Reaction:

96% reacted with love

Strategy 2: Facilitating discussions with topic experts[11]

NYU

Conversations Podcast

Hosted by President Andy Hamilton

In these Conversations, President Andy Hamilton interviews NYU faculty, students, and alumni who are using their intellectual gifts, determination, and creativity to make a profound difference in our world.

6. Source: Inside Higher Ed survey of university presidents
7. Source: Legend Labs analysis of university responses
8. Source: Twitter
9. Source: Legend Labs Brandwatch analysis | (Query: Canary) AND ((student OR students) AND (protests OR protest))
10. Source: Legend Labs Buzzsumo analysis
11. Source: NYU.edu

II. BOARD OF TRUSTEES

1. An evolving competitive environment demands a reexamination of the means by which university leadership communicates with their respective boards. Trustees, typically executive level individuals, demand quantitative proof points to measure institutional impact and brand perception.

> " *You are the people that have to ask the hard questions to provide the oversight. You need to be well-informed and highly engaged, and you have to make sure that your administration is giving you the data that you need.*[12]
>
> - Dr. Michael B. Poliakoff on trustees
> President of the American Council of Trustees and Alumni

> " *Our ability to tell a story with data is paramount to illustrating the value and impact of the work we do in communications and marketing to our leadership.*[13]
>
> - VP of Communications at a top 20 public university in the nation

2. Trustees are seeking more and more data on university performance, especially in the context of news publications they read and media they consume. Given this appetite for information, it is unsurprising that when trustees become the focus of a story, they will want to see similar types of intelligence around that coverage and related conversions. As a result, leadership must be hyper-aware of what people are saying about trustees. Numerous cases over the past 18 months have exemplified the fact that actions taken by university trustees, both as individuals and as a group, can shape perceptions of an institution.

Analysis of articles regarding the denial of tenure for Nikole Hannah-Jones by the UNC Board of Trustees

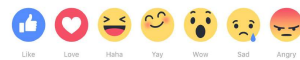ARTICLES AND ENGAGEMENTS OVER TIME[14]
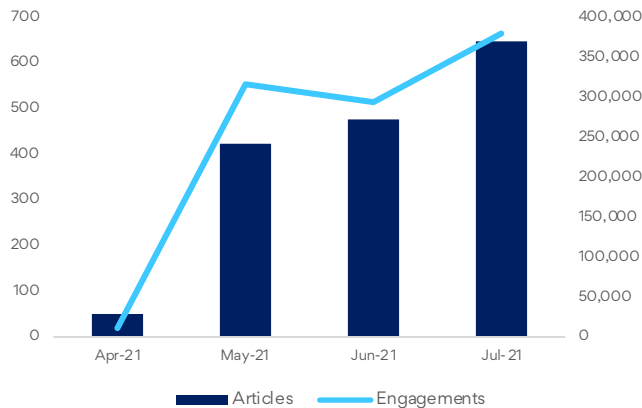
1,463 Articles Analyzed   **756,204** Total Engagements
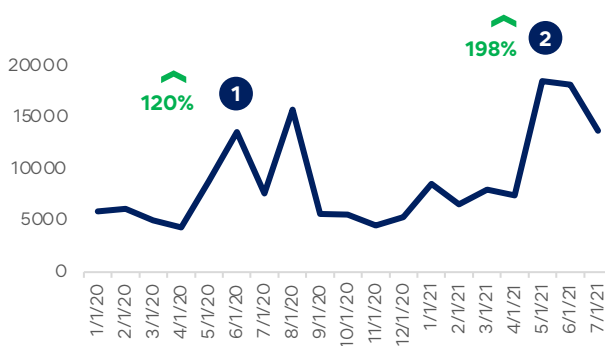
TOP REACTION: ANGRY

83.8K REACTIONS COLLECTED
36% WERE ANGRY

Like Love Haha Yay Wow Sad Angry

BOARD OF TRUSTEES COVERAGE OVER TIME[14]

120% **198%**

① Mark Jacob | Jun 20, 2021

Fox's Maria Bartiromo, a proponent of the Big Lie and defender of insurrectionists, is on the board of trustees of New York University. This is a stain on the reputation of @nyuniversity, which should eject her.

♥ 2.6K   ⤵ 1.1K   💬 78

② ABC News | Jun 27, 2020 ✓

The board of trustees at Princeton University voted Saturday to remove the name of Woodrow Wilson from the School of Public and International Affairs for the 28th president's "racist thinking and policies."

♥ 149   ⤵ 45   💬 14

12. Source: Academic Influence
13. Source: VP of Communications (Anonymous)
14. Source: Legend Labs Buzzsumo analysis (Query: "Nikole Hannah-Jones" OR "Nikole Hannah Jones" –Howard)
15. Source: Legend Labs Brandwatch Analysis (Query: Canary) AND (Trustee*)

III. STATE LEGISLATORS

1. Higher education has become an epicenter of debate and discussion as state and national politics grow increasingly intertwined with campus life. Legislation targeted at higher education has trended upward in recent years and looks to be spiking significantly in 2021, introducing new challenges in balancing competing stakeholder interests.

An analysis of postsecondary bills that have been introduced by state legislators over the last three years reveals increasing legislative focus on higher education.[16]

July 2021 – Dec 2021

2019	
2020	
2021	

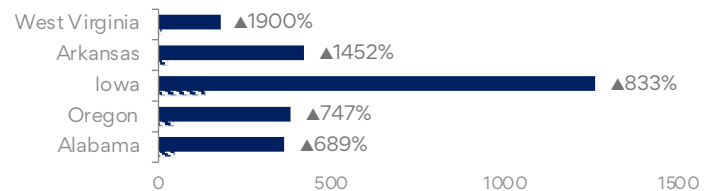0   500   1000   1500   2000   2500
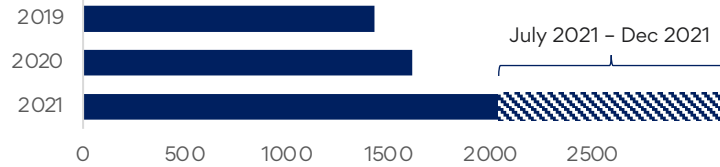
Legislation is not the only marker of this trend, as political conversations in the context of higher education have increased drastically over the last 18 months. An analysis of mentions from the Twitter accounts of national and state politicians over the past year reveals a sharp increase in mentions directed at universities.

CONVERSATION VOLUME AND REACH ANALYSIS[17]
(6/1/20 - 7/1/21)

66.4K
TOTAL UNIQUE MENTIONS
⌃ **287%**

4.2K
UNIQUE AUTHORS
⌃ **42%**

1.66B
TOTAL REACH
⌃ **193%**

* FROM PREVIOUS PERIOD

STATE CONVERSATION BENCHMARK (BY LARGEST % INCREASE)[17]
(6/1/20 - 7/1/21)

West Virginia	▲1900%
Arkansas	▲1452%
Iowa	▲833%
Oregon	▲747%
Alabama	▲689%

0   500   1000   1500

2. The convergence of politics and higher education has catalyzed growing tensions on campus as student bodies across the country have criticized both politicians and legislation.

HIGHER EDUCATION CONVERSATION VOLUME OVER TIME + GOVERNOR DESANTIS[18]

Chris Hahn | Jun 23, 2020 ✓

Florida Governor Ron DeSantis signed legislation that requires public universities & colleges survey students, faculty and staff about their beliefs and viewpoints. This is the 1st step toward George Orwell's thought police. One has to wonder what he will do with this info.

♥ 4.2K   ⟲ 1.8K   💬 578

3. Institutions must be increasingly conscious of how they are portrayed in media consumed by their state's legislators in order to mitigate or neutralize related reputational threats.

MOST ENGAGED ARTICLES FOR THE UNIVERSITY OF TEXAS (6/1/20 – 7/1/21)[19]

PUBLICATION	DATE	HEADLINE	TOTAL ENGAGEMENTS	TOP REACTIONS	
Police Tribune	10/24/20	University Of Texas Students Demand School Donate Funds To Black Lives Matter, Band Refuses To Play 'The Eyes Of Texas'	**41.8K**	😡 71%	😂 23%
Daily Wire	10/26/20	University Of Texas Band Won't Play 'Eyes Of Texas' After Claims Of Racism. Stadium Speakers Play It, Fans Sing It.	**22.8K**	😂 38%	😡 32%
FOX News	3/1/21	University of Texas alumni threaten to no longer donate amid controversy surrounding school song, emails show	**17.9K**	😂 42%	😡 31%
The Blaze	12/17/20	University of Texas names journalism award after Dan Rather	**15.7K**	😂 66%	😡 25%
toddstarnes.com	10/22/20	REBELLION: University of Texas Marching Band Refuses to Play Beloved Spirit Song	**14.8K**	😡 77%	😢 8%

16. Source: National Conference of State Legislators
17. Source: Legend Labs Brandwatch analysis (Query: Canary) AND (Twitter accounts owned by politicians)
18. Source: Legend Labs Brandwatch analysis (Query: Canary) AND (DeSantis)
19. Source: Legend Labs Buzzsumo analysis (Query: "University of Texas")

4. At the crux of many conversations regarding state legislative activity and higher education is, of course, budgets and funding. The pandemic-induced recession is not the only financial crisis of the 21st century. The impact of the 2008 recession on higher education was severe, and many states are still feeling that impact today.

HIGHER EDUCATION FUNDING NATIONWIDE[20] (2008 - 2019)

Funding Decrease
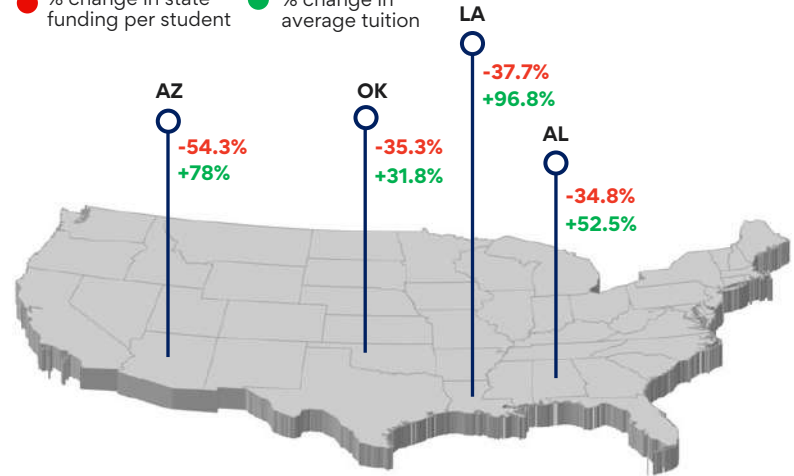
$3.4B ⌄

Per Student Funding

11.6% ⌄

Four-Year Tuition (Public Schools)

35.2% ⌃

MOST SEVERELY IMPACTED STATES (2008 - 2019)[20]

🔴 % change in state funding per student
🟢 % change in average tuition

LA
-37.7%
+96.8%

AZ
-54.3%
+78%

OK
-35.3%
+31.8%

AL
-34.8%
+52.5%

Drastic funding cuts in higher education had severe consequences across the board, negatively impacting the employment of faculty and staff, quality of learning, graduation rates, and much more. The unresolved financial damage caused by the 2008 recession has left states and institutions more vulnerable to the financial ramifications of the pandemic.
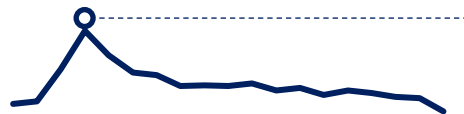
HISTORY REPEATING[20]

Ahead of the COVID-19 recession, state higher education funding was still below 2008 levels.

As a result of the pandemic: **27 states** have cut higher education funding for the 2020/2021 fiscal years.

WIDESPREAD FALLOUT

FACULTY AND STAFF LAYOFFS[21]
(1/1/20 – 7/1/21)

265K
Mentions

Jayne Miller | Apr 22, 2020 ✔

Johns Hopkins expecting $100 mil loss thru 6/30. $375 mil loss thru 6/30/2021 due to Coronavirus pandemic In message to Hopkins community, president lays out impact: Layoffs/furloughs expected Pay cuts for top employees Freeze on salaries No capital spending

LEARNING LOSS[22]
(1/1/20 – 7/1/21)

17K
Mentions

REUTERS

Another danger for kids in the age of COVID: Failing grades

ON-TIME GRADUATION[23]
(1/1/20 – 7/1/21)

77.8K
Mentions

The Revielle | Mar 12, 2020 ✔

Some #LSU students' last time to study abroad or graduate on time was this summer, however, the cancellation of these programs in light of the coronavirus ended those hopes.

20. Source: Center on Budget and Policy Priorities
21. Source: Legend Labs Brandwatch analysis (Query: Canary) AND ((Faculty OR staff) NEAR/15 (layoff* OR "laid off" OR fire* OR firing OR cuts))
22. Source: Legend Labs Brandwatch analysis (Query: Canary) AND ("learning loss" OR "learning less") OR (("fall behind" OR "falling behind") NEAR/15 (academ* OR class* OR learn*))
23. Source: Legend Labs Brandwatch analysis (Query: Canary) AND (graduat* NEAR/10 ("on time" OR "on-time" OR late))

TREND 2

AN EVOLVING PERCEPTION OF VALUE

Is a college degree worth the money? This is not a new question, but it has reemerged with vigor, amplified by pandemic-induced economic pressures, new geographic considerations with remote/virtual learning options, and an evolving landscape of education/experience alternatives. Institutions find themselves not only competing with peers for applicants, but also with the option of skipping the traditional 4-year college experience all together.

I. REEXAMINING PRIORITIES

Financial concerns are top of mind for applicants across the country, as students increasingly look to their higher education journey as an investment over an experience. Pandemic-induced uncertainty around the delivery of education has only fanned the flames of doubt. Institutions must identify and answer the key questions among potential applicants if they are to remain competitive in attracting talent.

ECONOMIC OPTIMISM[24]

- Will I be able to get a job directly out of college?

80% of students are still concerned about their job prospects once they graduate.

QUALITY OF EDUCATION[24]

- Will I receive the same quality of education from a hybrid or online education?

56% of students are concerned that their degree is less valuable because it was online.

FINANCIAL STABILITY[24]

- Has the pandemic jeopardized my ability to afford a degree?

67% of students are worried about their ability to pay tuition bills.

Cost of attendance is major area of concern. Excluding COVID-19, cost of attendance has been the most discussed vulnerability-related topic in higher education by a significant margin, receiving more than **2X** as many mentions as the next topic.[25]


5.89M
MENTIONS
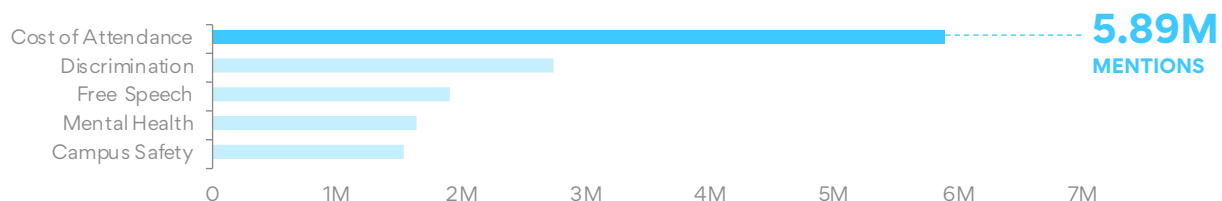
24. Source: Third Way + New America: Survey of 1,002 students nationwide (college & HS Seniors)
25. Source: Legend Labs Brandwatch analysis (Query: Canary) AND (Rule: Cost of Attendance)

II. HEIGHTENED TRANSPARENCY

Increased scrutiny around the value of a college degree has resulted in heighted transparency, typically facilitated by 3rd party organizations, allowing prospective students to better quantify the financial return-on-investment of higher education.

POSTSECONDARY VALUE COMMISSION
REPORT ON THE VALUE OF A COLLEGE DEGREE[26]
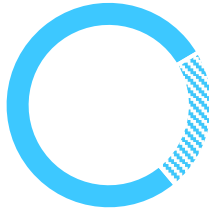
Of the **2,908** institutions included in the dataset, **650** failed to meet even the minimum benchmark of producing sufficient earnings to pay back the cost of a degree.

IHE SURVEY OF 433 HIGHER EDUCATION PRESIDENTS[6]

Which policy approaches do you believe the Biden administration is likely to pursue?

More transparent student outcome data for public consumption: **78%**

" *Later this year, the commission will release its public data tool containing performance data on value measures for thousands of colleges and universities nationwide.*
- Commission Press Release

III. APPLICATION TRENDS

The impact of financial and health-related concerns among prospective students has been made evident by application trends.

STAYING CLOSE TO HOME[3]

A 2020 survey of graduating high schoolers:

31% "I am applying to schools that are closer to home"

DECLINE IN APPLICATIONS TO LESS COMPETITIVE INSTITUTIONS[27]

Analysis from EducationData:

Fall 2020's approximate national enrollment shows a **2.5%** decline which was nearly **2X** of decline in Fall 2019 (-1.3%).

The decline of first-time student enrollment was **-13.1%**

These effects have not been felt across the board, as larger and more competitive institutions have faired better in the wake of the pandemic. This success has been compounded by decisions to wave SAT and ACT requirements, redefining the application process. The removal of these requirements has spurred a wave of applications to prestigious universities.

SAT/ACT SUBMISSIONS (VIA COMMON APP)[28]

Through February 14th, 2021: **44%**

Last year's total: **77%**

ATTRACTING NEW APPLICANTS (2021)

Larger undergraduate enrollments: more than 10,000 students

Selective admissions: admitting fewer than 50% of applicants

First-generation applicants
20%

Fee-waiver recipients
22%

Traditionally underrepresented groups
24%

ATTRACTING MORE APPLICANTS (2021)[29]

Berkeley — U.S. RANKING: **#22** APPLICANTS: **112,000** % INCREASE: **28%**

University of Virginia — U.S. RANKING: **#26** APPLICANTS: **48,000** % INCREASE: **15%**

Harvard University — U.S. RANKING: **#2** APPLICANTS: **57,000** % INCREASE: **42%**

26. Source: Postsecondary Value Commission
27. Source: EducationData
28. Source: The Common App
29. Source: Inside Higher Ed

IV. EVALUATING INSTITUTIONS

As applicants' focus shifts to these larger, more prestigious universities, the questions of educational and institutional quality become increasingly relevant. What resources do applicants use in their evaluation process? By what criteria do third-party services rank institutions?

It is widely accepted that the US World and News Report is the most reputable of institutional rankings providers, and it is these rankings that are typically discussed in the context of university status, however, third party evaluations of the criteria by which these rankings are produced have raised questions about their accuracy and reliability.

Malcolm Gladwell, a NYT bestselling author, recently addressed these questions in his podcast, Revisionists History, which can draw as many as 3 million downloads[30] per episode.

Gladwell's podcast featured students at Reed University who had recreated the outlet's scoring algorithm to a high degree of accuracy.

This recreation revealed that the Peer Assessment "Reputation Score" has the most heavily weighted coefficient **(6.58)**.
  • Meaning: If this score was increased by 1 and all others remained the same, the overall University score would rise by 6.58 points (Total score is out of 100).

To gather this score, 3 surveys are sent to every US institution. The surveys are for the:
  • President
  • Provost
  • Enrollment Manager/Head of Admissions

Respondents are asked to rank each institution's reputation from 1-5 but are not given specific criteria by which to make these decisions.

This revelation is concerning as it raises questions regarding the validity of the Report's rankings. The individuals tasked with ranking their peers typically have little to no knowledge about the hundreds of institutions included in the survey.

In addition to this, concerns exist regarding potential biases among leadership. For example:

  • Could religious affiliations impact perceptions?

  • Do competitive biases play a role?

  • How do the likes and dislikes of leadership impact their perceptions of other institutions?

eLDee | Jul 1, 2021   ✓ 8
You need to listen to this episode of RH. Malcolm Gladwell tackles the fraudulent university & college ranking system in the US.

New York Times Arts | Jul 21, 2021   ✓ 8
In a new two-part series of his podcast, "Revisionist History," Malcolm Gladwell mounts a scathing critique of U.S. News's influential college rankings.

Insider | Jul 23, 2021   ✓ 8
When US News develops a rating, they select what's valuable in higher education – when they decide, colleges react.

But, rankings don't measure qualities that are the most beneficial for students. The pandemic has shown how broken this system is.

Walter Hickey | Jul 21, 2021   ✓ 8
NEW from me

College rankings have made school less affordable, less equitable, and more miserable for students. The pandemic exposed just how broken the system is.

The question becomes: how do leaders address this aspect of the scoring process and potentially exploit biases among peer leadership to either:

  1. Overcome inherent biases around their institution among higher education leadership.

  2. Maximize awareness among higher education leadership regarding their value, differentiation, and impact (especially around the time the surveys are distributed).

V. OUTSPOKEN PERCEPTION SHAPERS

Another key factor institutions must consider is the role of perception shapers in the media, many of whom downplay the value of a college degree. These individuals typically have large followings and impressive reach in earned media, using these channels to communicate their perspectives on the value and impact of higher education in generating career and financial success.

BILLIONAIRE CELEBRITIES

Elon Musk has been a vocal critic of higher education in the past and has even offered positions at Tesla for applicants without college degrees.[8]

Elon Musk | Dec 20, 2020

Pretty much. The main value of college used to be hanging out, having pseudo intellectual conversations & partying with people your own age. Now, even that's gone.

♥ 9.6K ⟲ 1.1K 💬 174

Austin Tesla Club | Mar 31, 2021

High School Grads: You do not have to have a college degree to work for Tesla. You can work for Tesla straight out of high school. Chris Reilly of recruiting explains:

♥ 9.1K ⟲ 1.8K 💬 540

YOUNG, SUCCESSFUL ENTREPRENEURS

Erik Finman has emphasized his success stories as a result of skipping college to focus on ideas and ventures.[8,31]

Erik Finman | Apr 2, 2020

I was a kid from Idaho then:
At 15 - Dropped out & Moved to SF
At 17 - Sold my Startup
At 18 - Became youngest Bitcoin Millionaire
At 19 - Built a working Dr. Octopus Suit
At 20 - We launched a Satellite
At 21 - We built a multi-million dollar crypto company
Keep watching.

♥ 2.5K ⟲ 367 💬 21

CNBC

Bitcoin millionaire Erik Finman says going to college isn't worth it

INDUSTRY TITANS

Peter Thiel has incentivized dropping out of college by offering high paying internships and grant money for students to pursue entrepreneurial endeavors.[32,33]

NEWSWEEK MAGAZINE

Peter Thiel Thinks You Should Skip College, and He'll Even Pay You For Your Trouble

businesswire
A BERKSHIRE HATHAWAY COMPANY

"The Thiel Foundation today named 24 people into the 2020 class of Thiel Fellows. The Fellowship program, which launched in 2011, encourages talented young people to pursue big ideas and start companies instead of attending college."

31. Source: CNBC
32: Source: Newsweek Magazine
33: Source: Businesswire

TREND 3

STORYTELLING IN A CONGESTED ENVIRONMENT

How do you attract the best students, student athletes, faculty, staff, coaches, and administrators? Answering that question is difficult enough for individual institutions wrestling for messaging consistency across every unit, college, or program. When you add hundreds of other institutions to the mix, all vying for talent and congesting channels of communication with similar value propositions, the challenge inevitably grows. To compete, universities are reexamining talent, channels, spend and spokespeople to more effectively engage in the digital age.

I. TALENT

Having a good story to tell doesn't necessarily equate to a story well told. As such, universities and colleges are augmenting teams to more effectively break through. Hiring trends for colleges and universities reveal a growing emphasis on the importance of storytelling through the lens of overall brand reputation, integrated digital experiences, and global reach.

THE CHRONICLE OF HIGHER EDUCATION JOB LISTINGS[34]
(EXECUTIVE LEVEL POSITIONS)

KEYWORD	# OF OPENINGS	EXAMPLE JOB LISTING
Marketing	**182**	ASSISTANT VICE PRESIDENT FOR MARKETING COMMUNICATIONS — UNIVERSITY OF MICHIGAN You will work with teams to clarify an overarching university **brand strategy** and develop and execute initiatives to **advance the brand and reputation.**
Branding	**59**	DIRECTOR OF BRAND ACTIVATION — UNIVERSITY OF OREGON Responsible for enhancing and executing the **brand reputation** of the University of Oregon.
Design	**317**	DIRECTOR OF UX DESIGN AND ASSESSMENT — VIRGINIA TECH. Improve of the user experience across platforms of **user engagement** to provide value students, faculty, staff, and affiliates.
Media	**107**	SENIOR DIRECTOR, MEDIA AND DIGITAL MARKETING — UNIVERSITY OF ST. AUGUSTINE FOR HEALTH SCIENCES Oversee the development and execution of **global marketing media strategies.**

34: Source: The Chronicle of Higher Education Jobs

II. CHANNEL STRATEGY

It is not enough for an institution to simply tell its story. Universities must ensure that their messages reach the intended audiences and to accomplish this, must be conscious of the platforms they are leveraging. The world of social media is evolving, and so too are the consumption habits of users.

Since its debut, TikTok has become a global sensation, amassing an active user base to rival the likes of Facebook, Twitter, and Instagram. The platform's userbase primarily consists of teens and young adults, making the platform a figurative gold mine when it comes to reaching current and prospective students.

A sample analysis of top public universities found that **80%** are not currently active on the platform.[35]

♪ **TikTok** [36]

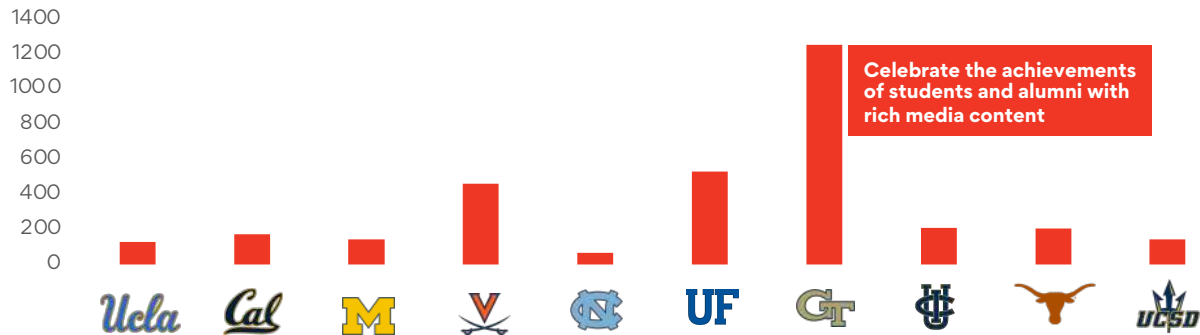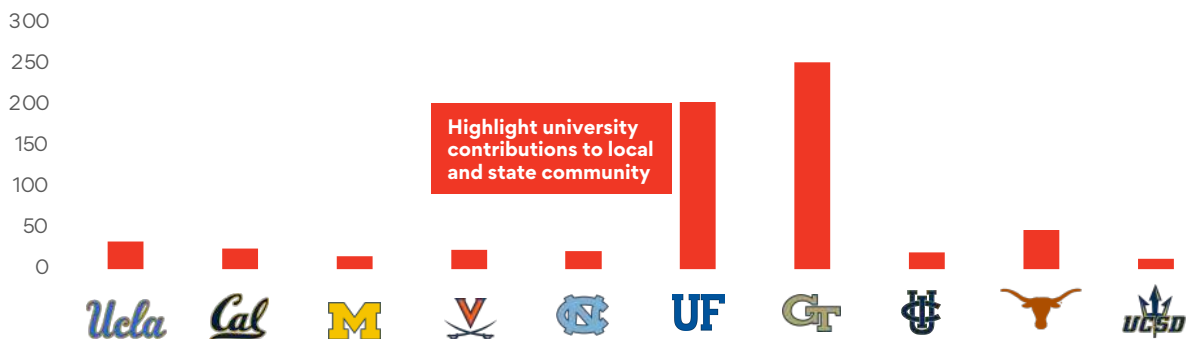| MONTHLY USERS:	USERS AGED 16-24:	DOWNLOADS:
~1 Billion	**60%**	**3** Billion

More established social media platforms are a rich source of strategic intelligence.

AVERAGE **FACEBOOK** ENGAGEMENT (LAST 10 POSTS AS OF 8/2/21)[37]

Celebrate the achievements of students and alumni with rich media content

AVERAGE **TWITTER** ENGAGEMENT (LAST 10 POSTS AS OF 8/2/21) [37]

Highlight university contributions to local and state community

AVERAGE **INSTAGRAM** ENGAGEMENT (LAST 10 POSTS AS OF 8/2/21) [37]
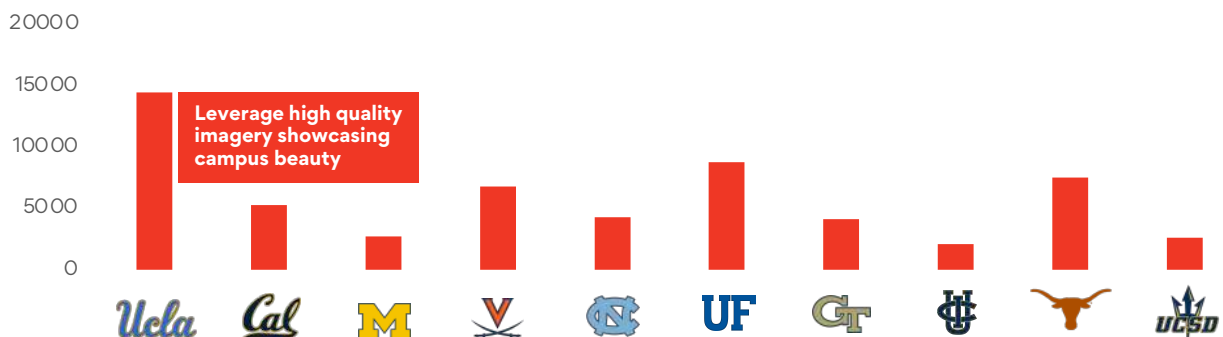
Leverage high quality imagery showcasing campus beauty

III. PAY TO PLAY ENVIRONMENT

Competition with peers isn't the only challenge universities and colleges face in breaking through the noise. They are also hampered by declining organic reach of content as social media companies look to monetize audiences through paid advertising. Higher education institutions have had to adapt to this pay-to-play environment to compete with peer institutions and to ensure that influential audiences, like trustees and legislators, are exposed to perception-shaping news.

ORGANIC REACH ON SOCIAL PLATFROMS

5.2% The percentage of a Facebook page's followers that will see a post organically on average.[38]

PAID SOCIAL LEVERAGED TO ADDRESS PROSPECTIVE STUDENT CONCERNS[39]

Cost and distance

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✓ Study close to home
✓ Get a high-quality SUNY education
✓ Thank yourself later

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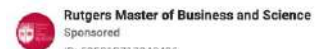
Are you ready to learn more about how our degree can prepare you for a future in careers like engineering and sustainability?

Find Your Success
Develop vital skills needed to take the lead.   Learn More

90% Paid social isn't the only avenue universities are exploring to disseminating messaging. A Legend Labs sample analysis of the top public and private institutions in the country found that 90% are spending on search advertising.
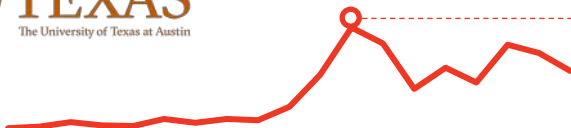
SEARCH SPEND ANALYSIS[40]
1/1/20 – 7/1/21

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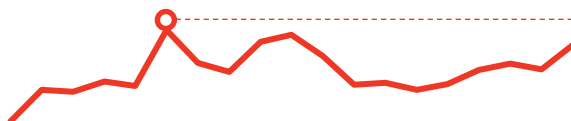
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Apply today! With no application fee, there is nothing to lose. Gain the benefits of a large university with the personalization of a small institution. View Scholarship Programs. View Fees. Join Mailing List. Financial Aid Available.

38: Source: Hootsuite
39: Source: Facebook Ad Library
40: Source: SEMRush

IV. INSTITUTIONAL VOICES

1. There are no more active and impactful storytellers than faculty and experts when it comes to communicating the achievements, expertise, and cultural/societal relevance of an institution. The global pandemic has exemplified this role as research, innovation, and thought leadership among these experts has informed crisis response across the nation.

EXPERTS' EXPOSURE IN ONLINE NEWS[41]

6.01M Total articles covering higher education over the last 365 days

54% Referenced either university faculty or research
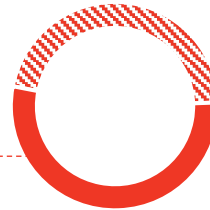
EXPERTS' EXPOSURE IN BROADCAST[42]

University experts featuring in broadcast coverage between 7/1/20 and 7/1/21 reached a combined global audience of: **1.6 Billion**
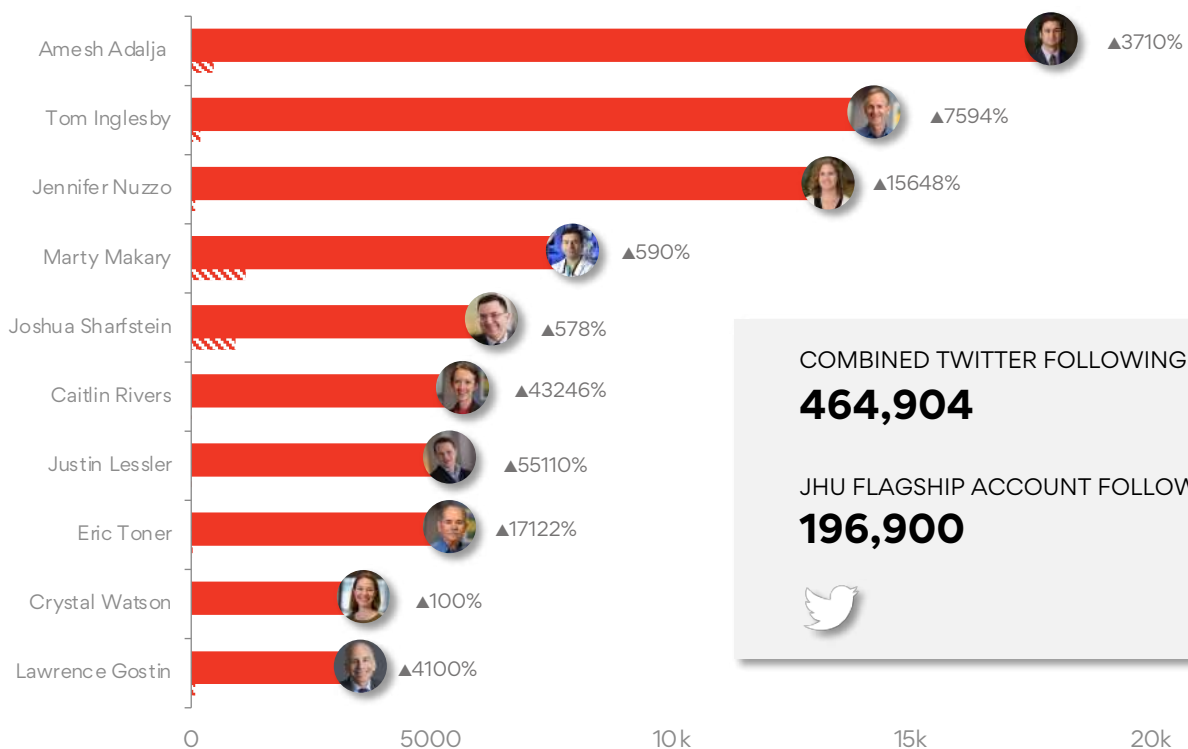
2. Numerous university faculty have become celebrities in their own right, amassing enormous social followings and featuring in national media on a regular basis. There is no better case study for the proliferation of faculty exposure in the media than Johns Hopkins University.

EXPERTS' COVERAGE BENCHMARK[43]

FIRST 6 MONTHS OF 2020
LAST 6 MONTHS OF 2019

Name	Value
Amesh Adalja	▲3710%
Tom Inglesby	▲7594%
Jennifer Nuzzo	▲15648%
Marty Makary	▲590%
Joshua Sharfstein	▲578%
Caitlin Rivers	▲43246%
Justin Lessler	▲55110%
Eric Toner	▲17122%
Crystal Watson	▲100%
Lawrence Gostin	▲4100%

0   5000   10k   15k   20k

COMBINED TWITTER FOLLOWING
464,904
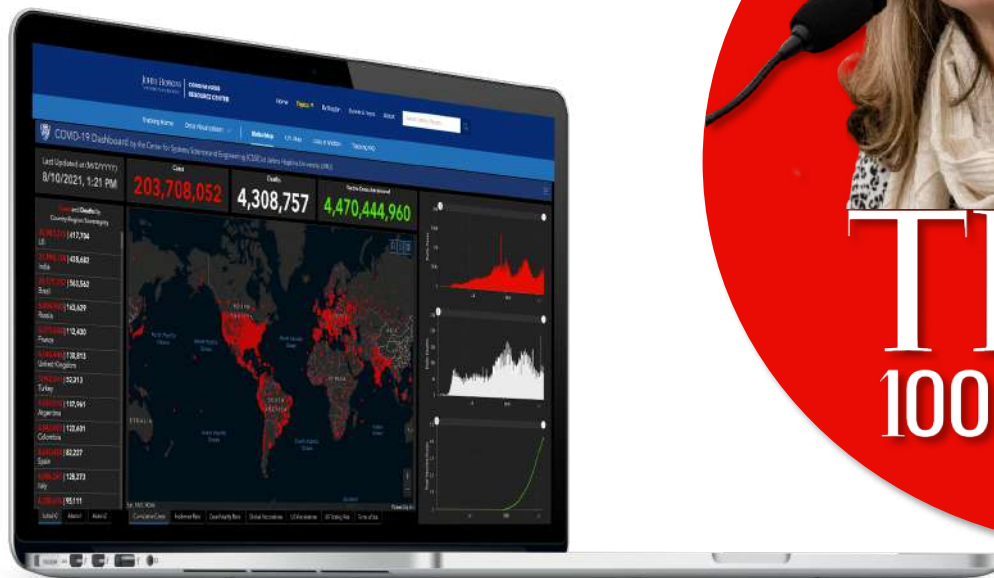
JHU FLAGSHIP ACCOUNT FOLLOWING[8]
196,900

3. These trends have extended beyond online mentions and social followings, as individual faculty have gained national recognition for achievements and innovations.

Lauren Gardner, a professor of engineering at **Johns Hopkins**, was named to **TIME Magazine's** list of the 100 most influential people of 2020 for her role in the creation of the CSSE COVID-19 tracking map.[44]

Since January 2020, this tracking map and related data has accounted for:[45]

2.5M Mentions

45% of **all** university mentions

NEW AND EMERGING THREATS

If you're reading this you know higher education is one of the most issues-rich environments there is, second only to the airline industry. This vulnerability-ridden landscape is vying for the number one spot, and the events of the last 12-18 months may have pushed higher education to #1. An examination of every vulnerability might push this report to the 100-page range. Instead, we look at three key issues that are top of mind now for communicators and administrators alike. In every instance leaders are asking three key questions: 1) how can we better prepare to be more proactive and less reactive, 2) what can we learn from our peers who have faced similar issues, and 3) when do we engage on an issue without risk of 'fanning the flames.'

I. CYBERSECURITY

In the wake of the COVID-19 pandemic, universities have quickly embraced online methods to support instruction and administration. These new technologies have revolutionized remote learning, but have simultaneously increased universities' vulnerability to cyber attacks, with ransomware events doubling from 2019 to 2020.
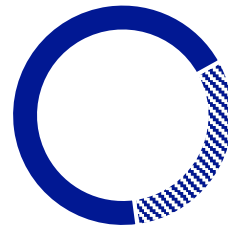
1,681 schools, colleges, and universities impacted by **84** cybersecurity incidents in 2020

26 of these incidents directly impacted higher education[46]

"Let's face it, the bad actors use local turmoil to their advantage. The pandemic provides them with numerous opportunities"[46]

– Educause Survey Response (2020)

CYBERSECURITY + HIGHER EDUCATION NEWS ARTICLES[47]
(8/1/19 – 7/1/21)
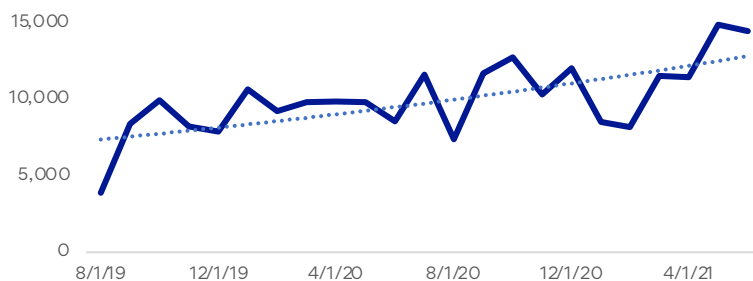
$ 447,000

The average cost of a ransomware attack in higher education in 2020[48]

46: Source: EDUCAUSE
47. Source: Legend Labs Canary analysis | Query: (Canary) AND (rule: cybersecurity) – Limited to news articles
48. Source: BlueVoyant – Cybersecurity in Higher Education Report

II. FOREIGN ESPIONAGE

While concerns over Chinese espionage date back many years, accusations of spying on American universities and research institutions has become far more prominent in the past 18-24 months. As the issue generates more attention in the media, with the backdrop an ongoing trade war and the Chinese origins of the COVID-19 pandemic, it is likely that this topic will generate more coverage and debate in the coming months. Concerns remain around the extent to which research data needs to be classified, especially when seeking to solve global issues (e.g., cancer), and the extent to which covert Chinese activities could result in a backlash against visiting students from China and Chinese-American students and faculty.

HIGHER EDUCATION CONVERSATION VOLUME OVER TIME + FOREIGN ESPIONAGE[49]
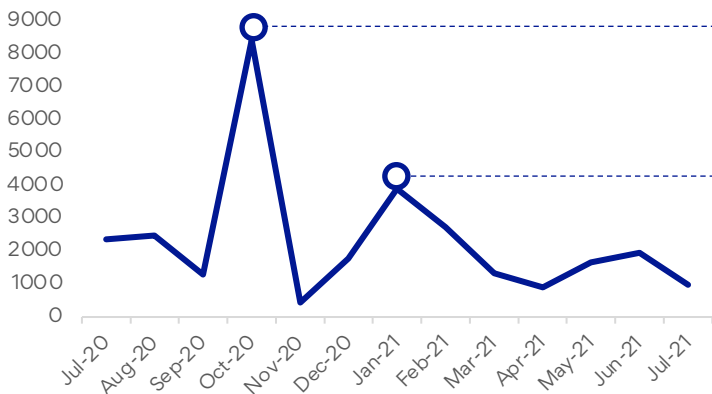
Emerald Robinson | Oct 21, 2020 ✓

WSJ: Cornell University failed to disclose $1.2 billion in foreign donations including contracts with Huawei, according to US Dept of Education.

♥ 2.1K   ⟲ 1.8K   💬 196

Stephanie Meyers | Jan 14, 2021 ✓

NEW: Authorities arrest and charge an MIT professor and researcher for allegedly failing to disclose his work for China to the U.S. Department of Energy.
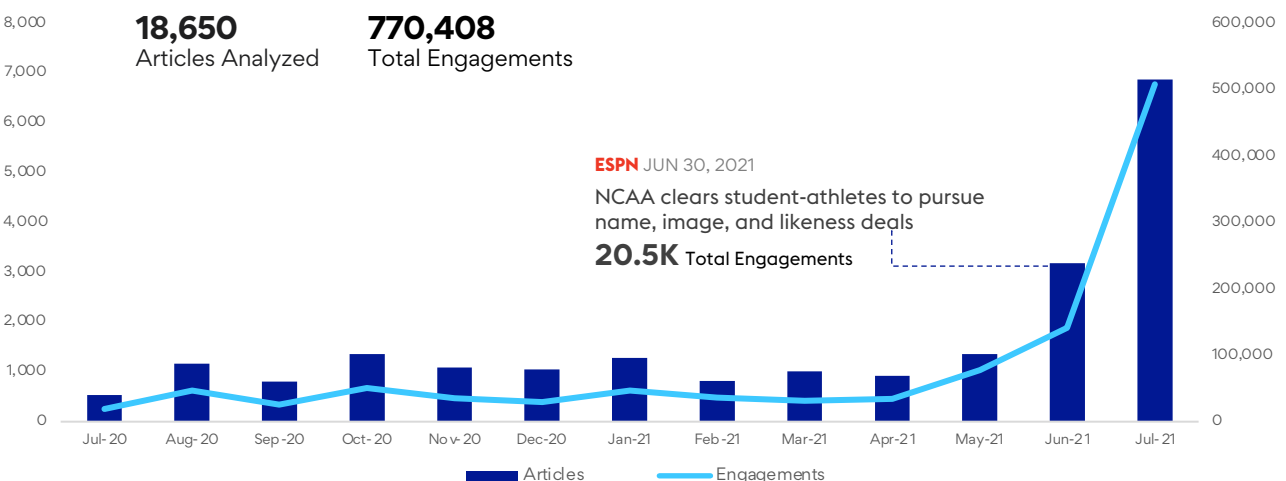
♥ 1.8K   ⟲ 553   💬 68

III. NAME, IMAGE, AND LIKENESS (NIL)

Conversation around NIL and amateurism in college athletics has grown exponentially in the past 12 months. While many support the opportunity for student-athletes to make money under NIL guidelines, a recent Bucknell survey revealed that only 26% of respondents believed athletes should be paid directly from university funds, with 45% opposing it.[50] Athletics, the 'front porch of the university,' remains integral to overall brand reputation and universities are increasingly working to ensure tight alignment between central campus and athletics administration to deliver compelling and consistent messaging.

NIL ARTICLES AND ENGAGEMENT OVER TIME[51]

18,650
Articles Analyzed

770,408
Total Engagements

ESPN JUN 30, 2021

NCAA clears student-athletes to pursue name, image, and likeness deals

20.5K Total Engagements

Articles   Engagements

49. Source: Legend Labs Brandwatch analysis | Query: (Canary) AND (rule: research misconduct)
50. Source: Bucknell Institute for Public Policy Poll (June 2021)
51. Source: Legend Labs BuzzSumo analysis | Query: ("NIL") OR ("Name" AND "Image" AND "Likeness")

STRATEGIC IMPERATIVES:

TREND RECAP
What we know

Strenuous Governance Roles	An Evolving Perception of Value	Storytelling In a Congested Environment	New and Emerging Threats
Heightened attention and scrutiny directed at institutional leadership compounded by evolving governance relationships.	An evolving competitive landscape forcing a reevaluation of priorities for current and prospective students.	Institutions wrestling with defining and communicating differentiation and value in a competitive environment with complex consumer demands.	A year of turmoil amplifying existing reputational vulnerabilities and introducing new threats, putting institutional preparedness under the spotlight.

STRATEGIC IMPERATIVES CHECKLIST
Review the following list and consider if your institution has successfully implemented these strategic imperatives across campus

✔/✖

BRAND POSITIONING	Establish a clear definition of institutional differentiation and relevance, articulated in the context of a peer analysis	
DIGITAL AND STORYTELLING TALENT	Recruit expert content creators and native digital and social media storytellers to measurably drive new levels and types of engagement	
STAKEHOLDER MAPPING	Create a detailed dissection of key audiences as it relates to communicating performance and facilitating involvement in key institutional decisions	
CHANNEL STRATEGY	Have channel-specific communications strategies for profiles across social platforms, tailored to maximize impact in the context of platform audiences and user habits	
MEDIA RELATIONS	Establish a proactive media relations strategy with key local publications and national outlets. Create an expert portal: a centralized resource for media members to locate and contact specialized university faculty	
PAID MEDIA STRATEGY	Utilize 1) A paid social strategy to maximize the exposure of curated content in the wake of organic reach decline. 2) A paid search strategy to reach prospective students in the context of key questions and concerns	
DATA AND ANALYTICS	Configure monitoring technologies, as leveraged in this report, to facilitate vulnerability mapping efforts as well as measurement of institutional impact in the context of peers and competitors	
CRISIS PREPAREDNESS	Map the top institutional vulnerabilities and develop escalation protocols and vulnerability specific crisis playbooks. *Optional: Crisis simulations*	
COLLABORATIVE STRUCTURES	To truly maximize ROI on the above imperatives, scale them to communicators across the institution. These can be scaled not only through shared data programs and collaborative exercises, but also by implementing educational curriculum to continually develop talent	

L E G E N D   L A B S

Legend Labs is a brand and communications consulting firm for the digital age. Our team of experienced strategists, analysts, and creatives helps educational institutions build, grow, and protect their reputations in a world of accelerating digital transformation.

For more information about Legend Labs or this report, get in touch at:

hello@legendlabs.com

LEGEND LABS

HIGHER EDUCATION'S ACCELERATED EVOLUTION

A LANDSCAPE ANALYSIS TO
INFORM BRAND, COMMUNICATIONS,
AND REPUTATION IMPERATIVES