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:

<table>
<thead>
<tr>
<th>TREND 1</th>
<th>Strenuous Governance Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE 2</td>
<td>Heightened attention and scrutiny directed at institutional leadership compounded by evolving governance relationships.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TREND 2</th>
<th>An Evolving Perception of Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE 7</td>
<td>An evolving competitive landscape forcing a reevaluation of priorities for current and prospective students.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TREND 3</th>
<th>Storytelling In A Congested Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE 11</td>
<td>Institutions wrestling with defining and communicating differentiation and value in a competitive environment with complex consumer demands.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TREND 4</th>
<th>New and Emerging Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE 16</td>
<td>A year of turmoil amplifying existing reputational vulnerabilities and introducing new threats, putting institutional preparedness under the spotlight.</td>
</tr>
</tbody>
</table>

**RECOMMENDATIONS**

<table>
<thead>
<tr>
<th>Strategic Imperatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE 18</td>
</tr>
<tr>
<td>Initiatives that leaders and communicators can consider as they pivot from reactive to proactive, from siloed to collaborative, from art to science, and from measuring outputs to outcomes.</td>
</tr>
</tbody>
</table>
TREND 1

STRENUEOUS 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](chart)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Mentions</th>
<th>Retweets</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of Attendance</td>
<td>624K</td>
<td>13%</td>
<td>1%</td>
</tr>
<tr>
<td>Discrimination</td>
<td>431K</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Free Speech</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campus Safety</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Litigation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mental Health</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buildings &amp; Monuments</td>
<td></td>
<td></td>
<td>104%</td>
</tr>
</tbody>
</table>

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

41% of students are looking to their school administration first for information on the vaccine.

Scrutinizing Leadership Pandemic Response

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

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 | Canary: Mentions of University Presidents + Canary higher education vulnerabilities
4. Source: John Gezena & 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

<table>
<thead>
<tr>
<th>Somewhat/much less important</th>
<th>About the same</th>
<th>Somewhat more important</th>
<th>Much more important</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
<td>40%</td>
<td>45%</td>
<td></td>
</tr>
</tbody>
</table>

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

@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)

562K Mentions 823K Retweets 698M Total Reach

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-eds10

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 experts11

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.
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.”

- Dr. Michael B. Polisakoff 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.”

- 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 conversations. 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

![Graph showing articles and engagements over time](chart)

- 1,463 Articles Analyzed
- 756,204 Total Engagements
- **TOP REACTION: ANGRY**
- 83.8K REACTIONS COLLECTED
- 36% WERE ANGRY

![Emojis representing reactions](emojis)

**BOARD OF TRUSTEES COVERAGE OVER TIME**

- **Mark Jacob** | Jun 20, 2021
Fox’s Maria Bariromo, 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 NYU, which should eject her.
- 2.0K Likes 119 Shares

- **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 Likes 4 Shares 14 Comments

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12. Source: Academic Influence
13. Source: VP of Communications (Anonymous)
15. Source: LexisNexis Academic (Query: Chaney 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.\(^{16}\)

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\(^{17}\)

<table>
<thead>
<tr>
<th>Total Unique Mentions</th>
<th>66,440</th>
<th>4,200</th>
<th>1,666</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Increase</td>
<td>287%</td>
<td>42%</td>
<td>193%</td>
</tr>
</tbody>
</table>

STATE CONVERSATION BENCHMARK (BY LARGEST % INCREASE)\(^{17}\)

<table>
<thead>
<tr>
<th>State</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Virginia</td>
<td>1900%</td>
</tr>
<tr>
<td>Arkansas</td>
<td>1452%</td>
</tr>
<tr>
<td>Iowa</td>
<td>747%</td>
</tr>
<tr>
<td>Oregon</td>
<td>685%</td>
</tr>
<tr>
<td>Alabama</td>
<td>833%</td>
</tr>
</tbody>
</table>

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\(^{18}\)

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.

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)\(^{19}\)

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Headline</th>
<th>Total Engagements</th>
<th>Top Reactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police Tribune</td>
<td>10/24/20</td>
<td>University Of Texas Students Demand School Donate Funds To Black Lives Matter, Band Refuses To Play ‘The Eyes Of Texas’</td>
<td>41.8K</td>
<td>😞 71% 😛 23%</td>
</tr>
<tr>
<td>Daily Wire</td>
<td>10/26/20</td>
<td>University Of Texas Band Won’t Play ‘Eyes Of Texas’ After Claims Of Racism, Stadium Speakers Play It, Fans Sing It.</td>
<td>22.8K</td>
<td>😣 38% 😞 32%</td>
</tr>
<tr>
<td>FOX News</td>
<td>3/1/21</td>
<td>University of Texas alumni threaten to no longer donate amid controversy surrounding school song, emails show</td>
<td>17.9K</td>
<td>😶 42% 😞 31%</td>
</tr>
<tr>
<td>The Blaze</td>
<td>12/17/20</td>
<td>University of Texas names journalism award after Dan Rather</td>
<td>15.7K</td>
<td>😳 66% 😞 25%</td>
</tr>
<tr>
<td>toddstarnes.com</td>
<td>10/22/20</td>
<td>REBELLION: University of Texas Marching Band Refuses to Play Beloved Spirit Song</td>
<td>14.8K</td>
<td>😮 77% 😞 8%</td>
</tr>
</tbody>
</table>

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.

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**

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**

(1/1/20 – 7/1/21)

265K Mentions

**LEARNING LOSS**

(1/1/20 – 7/1/21)

17K Mentions

**ON-TIME GRADUATION**

(1/1/20 – 7/1/21)

77.8K Mentions

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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 firing OR firing OR cuts))
22. Source: Legend Labs Brandwatch analysis (Query: Canary AND ("learning loss" OR "learning loss") OR (falling behind) OR "falling behind") NEAR/15 (academic OR class OR term OR term)
23. Source: Legend Labs Brandwatch analysis (Query: Canary) AND (graduates NEAR/10 (on-time OR on-time OR on-time))
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.

1. 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.

<table>
<thead>
<tr>
<th>ECONOMIC OPTIMISM</th>
<th>80% of students are still concerned about their job prospects once they graduate.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Will I be able to get a job directly out of college?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QUALITY OF EDUCATION</th>
<th>56% of students are concerned that their degree is less valuable because it was online.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Will I receive the same quality of education from a hybrid or online education?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FINANCIAL STABILITY</th>
<th>67% of students are worried about their ability to pay tuition bills.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Has the pandemic jeopardized my ability to afford a degree?</td>
<td></td>
</tr>
</tbody>
</table>

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

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 heightened 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

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.

“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

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

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 fared better in the wake of the pandemic. This success has been compounded by decisions to waive 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)

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%

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 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?

You need to listen to this episode of RH. Malcolm Gladwell tackles the fraudulent university & college ranking system in the US.

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.

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.

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).

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.
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.⁶

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.

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.

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:

YOUNG, SUCCESSFUL ENTREPRENEURS

Erik Finman has emphasized his success stories as a result of skipping college to focus on ideas and ventures.⁹,³¹

Erik Finman | Apr 2, 2020
I was a kid from Idaho there: 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

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

“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: Business Wire
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 |
| (EXECUTIVE LEVEL POSITIONS) | |
| KEYWORD | # OF OPENINGS | EXAMPLE JOB LISTING |
| Marketing | 182 | ASSISTANT VICE PRESIDENT FOR MARKETING COMMUNICATIONS 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 Responsible for enhancing and executing the brand reputation of the University of Oregon. |
| Design | 317 | DIRECTOR OF UX DESIGN AND ASSESSMENT Improve the user experience across platforms of user engagement to provide value students, faculty, staff, and affiliates. |
| Media | 107 | SENIOR DIRECTOR, MEDIA AND DIGITAL MARKETING Overseer 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.36

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

35: Source: Legend Labs analysis
36: Source: Wallcom Media
37: Source: Legend Labs analysis of engagements by platform (as of 8/2/21)
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 PLATFORMS

- 5.2%

The percentage of a Facebook page’s followers that will see a post organically on average.

PAID SOCIAL LEVERAGED TO ADDRESS PROSPECTIVE STUDENT CONCERNS

Cost and distance

Leadership and guidance

- St. Mary’s University
  - BSN
  - MSW
  - Top 100 Value
  - #26 Best Value

Career readiness

- Rutgers Master of Business and Science
  - #2也會1775

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

1/1/20 - 7/1/21

- University of Utah
- Texas University
- Baylor University

Lowest Cost Top 10 Online MBA
- University of Utah MBA Online

34% Average Salary Increase, 61% Received Promotions
- #1 Utah MBA - Now Online. Download Brochure. Apply Online. View Virtual Events.

Become a Data Scientist - 6-Month Certificate Course
- http://a.utexas.edu/dataanalytics/certificate

A Comprehensive Course for professionals looking to transition into a career in analytics. Get a certificate in Analytics from The University of Texas at Austin, #4 in Analytics.

Apply to Baylor University - No Application Fee
- www.baylor.edu

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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

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

54% Referenced either university faculty or research

EXPERTS’ EXPOSURE IN BROADCAST

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

FIRST 6 MONTHS OF 2020
LAST 6 MONTHS OF 2019

Amesh Adalja ▲370%
Tom Inglesby ▲7594%
Jennifer Nuzzo ▲15648%
Marty Makary ▲590%
Joshua Sharfstein ▲578%
Cassie Rivers ▲43246%
Justin Lessler ▲55110%
Eric Toner ▲17122%
Crystal Watson ▲100%
Lawrence Gostin ▲4100%

COMBINED TWITTER FOLLOWING

464,904

JHU FLAGSHIP ACCOUNT FOLLOWING

196,900

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41: Source: Legend Labs Brandwatch analysis (Query: Canopy) all mentions, (Query: Canopy) AND (expert OR professor OR research) (Query: Canopy) AND (expert OR professor OR research)
42: Source: Legend Labs Critical Mention analysis (Query: “university professor” OR “university professors” OR “university researcher” OR “university researchers”) (Query: “university professor” OR “university professors” OR “university researcher” OR “university researchers”)
43: Source: Legend Labs Brandwatch analysis (Query: Johns Hopkins University) AND (rule: university experts)
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:

- **2.5M** Mentions
- **45%** of all university mentions

44: Source: TIME Magazine
45: Source: Legend Lars Brandwatch analysis | (Query: Johns Hopkins University) AND (rule: CSSE Tracking Map)
TREND 4
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.

“Let’s face it, the bad actors use local turmoil to their advantage. The pandemic provides them with numerous opportunities.”

— Educause Survey Response (2020)

1,681 schools, colleges, and universities impacted by 84 cybersecurity incidents in 2020

26 of these incidents directly impacted higher education

$447,000
The average cost of a ransomware attack in higher education in 2020

46: Source: EDUCAUSE
47: Source: LexisNexis Caity analysis | Query: (Canary OR AND) (title: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 have become far more prominent in the past 18-24 months. As the issue garners more attention in the media, with the backdrop of 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.

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. 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

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
## Strategic Imperatives:

### Trend Recap
What we know

<table>
<thead>
<tr>
<th>Strenuous Governance Roles</th>
<th>An Evolving Perception of Value</th>
<th>Storytelling in a Congested Environment</th>
<th>New and Emerging Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heightened attention and scrutiny directed at institutional leadership, compounded by evolving governance relationships.</td>
<td>An evolving competitive landscape forcing a reevaluation of priorities for current and prospective students.</td>
<td>Institutions wrestling with defining and communicating differentiation and value in a competitive environment with complex consumer demands.</td>
<td>A year of turmoil amplifying existing reputational vulnerabilities and introducing new threats, putting institutional preparedness under the spotlight.</td>
</tr>
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### Strategic Imperatives Checklist
Review the following list and consider if your institution has successfully implemented these strategic imperatives across campus

<table>
<thead>
<tr>
<th><strong>Brand Positioning</strong></th>
<th>Establish a clear definition of institutional differentiation and relevance, articulated in the context of a peer analysis</th>
</tr>
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<tbody>
<tr>
<td><strong>Digital and Storytelling Talent</strong></td>
<td>Recruit expert content creators and native digital and social media storytellers to measurably drive new levels and types of engagement</td>
</tr>
<tr>
<td><strong>Stakeholder Mapping</strong></td>
<td>Create a detailed dissection of key audiences as it relates to communicating performance and facilitating involvement in key institutional decisions</td>
</tr>
<tr>
<td><strong>Channel Strategy</strong></td>
<td>Have channel-specific communications strategies for profiles across social platforms, tailored to maximize impact in the context of platform audiences and user habits</td>
</tr>
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<td><strong>Media Relations</strong></td>
<td>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</td>
</tr>
<tr>
<td><strong>Paid Media Strategy</strong></td>
<td>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</td>
</tr>
<tr>
<td><strong>Data and Analytics</strong></td>
<td>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</td>
</tr>
<tr>
<td><strong>Crisis Preparedness</strong></td>
<td>Map the top institutional vulnerabilities and develop escalation protocols and vulnerability specific crisis playbooks. <em>Optional: Crisis simulations</em></td>
</tr>
<tr>
<td><strong>Collaborative Structures</strong></td>
<td>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</td>
</tr>
</tbody>
</table>
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:

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LEGEND LABS

HIGHER EDUCATION’S ACCELERATED EVOLUTION

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