

HIGHER EDUCATION MARKETING AND ENROLLMENT INDUSTRY TRENDS

HIGHER EDUCATION TRENDS

APPLICATION, ACCEPTANCE & COMMITMENT

The primary effects of the COVID-19 pandemic have faded from the college enrollment scene for undergraduates, according to Carnegie's most recent survey of graduating seniors. For example, the average number of applications per student, which peaked at more than 10 during the pandemic and has dropped back to pre-pandemic levels at around seven or eight. However, acceptance rates have increased to 75%, indicating that most students choose from between five and six options. Commitment times, which were slowed by pandemic concerns, have returned to normal, with most students (94%) fully committed by May 1. However, this could change in 2024 due to the FAFSA debacle.

COLLEGE & DEGREE CHOICE

A slight majority of students (52%) attended their top-choice institution last year. Those who could not attend their top school, even if admitted, often cited cost or distance from the institution as the two main reasons they had to select an alternative. The second and third most important factors in choosing an institution were scholarships/aid and tuition price, while location was fifth among 36 options.

Motivations to attend college have remained steady over time, with simply earning a degree being the most common (47% said it was a top-three reason to attend). However, learning about a passion (41%) has risen since its all-time low during the pandemic. Barriers to attending college are almost entirely related to finances. The percentage of students who say they will persevere and attend no matter the costs and challenges was 27% in 2023, higher than during the pandemic and about the same as pre-pandemic levels.

Both institutional-choice factors (which school to attend) and degree-selection factors (which major to pursue) have held steady. In the former category, degree options, scholarships, pricing, campus feel, location, and teaching quality are the top six. In the latter, personal interest, job opportunities, and salary potential outpace all other reasons for selecting a certain major. Importantly, nearly three-quarters of incoming first-year college students are highly or completely certain of the degree program they want to complete. This is up from about two-thirds in pre-pandemic studies.

COLLEGE SEARCH

Students are beginning the college search sooner than ever before, with a majority researching colleges before their junior year and 10% even having created a list of features they are looking for in a college by the time they start high school. While college websites are the most frequently used sources of information, family is the most *trusted* source in making college decisions, a trend that has increased since the pandemic. This suggests that they both play an important role in the

college search and decision process—websites and online searches lead students to school-specific information, while human interactions with friends, families, and school counselors are critical in determining what should be most important to them during this process.

AI & COLLEGE SEARCH

About 30% of prospects for 2024 and beyond use AI “occasionally” or more often. The most important use case for AI in college search is to reduce the time it takes to locate information and to “catch things I might have missed” during a personal search. Students see the future coming with AI, considering it to be the next generation’s internet or smartphone. It also means that many students are considering the “long-term viability” of majors and careers that AI could impact and are looking for training in AI as part of their college curricula.

FACTORS THAT BUILD FAMILIARITY

A meta-analysis of Carnegie perception studies revealed that distance is indeed the most important factor when predicting awareness of an institution. However, other factors play a role, including institutional designation (e.g., national or regional), public or private status, and even collegiate sports. The impact of sports was significant. One finding of the research was that *familiarity* is impacted by the very existence of a school's collegiate program, especially in a major Division I conference, but *reputation* is only impacted if the school has had recent success in football or men's basketball.

IMPACT OF STATES' POLITICAL CLIMATES

National Carnegie research on the impact of states' political legislation revealed that most students assign at least moderate importance to attending a college in a state whose legislation matches their opinions on the issues of abortion, trans rights, and DEI initiatives. While this interest was scored as less important for creating a college list than traditional factors like degree choice, cost, and distance, it was seen as an “overriding” final factor for nearly half of students. In other words, a college could be perfect, but if its home state either restricts or allows something they feel strongly about, they won't consider the institution.

Additionally, survey data released in 2024 by Gallup and Lumina Foundation show that 80% of prospective students prefer an institution in a state with less restrictive policies on abortion, and 84% prefer an institution in a state with more restrictive firearm policies. This indicates that, depending on the state, the local political climate could be used as a recruiting tool, or efforts will need to be made to counteract the perceived negative political climate.

RETENTION AS A FOCUS OF ENROLLMENT MANAGEMENT

Many institutions now focus on retention and student-success strategies as part of their institutional goals, due to US demographic shifts and increased competition for students. They prioritize retention to maintain headcounts and offset shrinking incoming classes, blurring the lines between recruitment and retention. To remain competitive in this changing landscape, institutions should include student-success initiatives in their enrollment planning. These initiatives may include creating first-year seminars to identify at-risk students within the first three weeks of school, using Customer Relationship Management (CRM) programs for prospective and current student populations, implementing peer-mentor programs, working with academic

advisors to support students in challenging courses, and using the same psychographic segmentation methods for recruitment as for retention.

CENTRALIZING OPERATIONS & PLANNING

Given the increasing demands on modern marketing operations, many institutions now favor larger, team-based central marketing operations over siloed, decentralized structures. Key to evolving operations is integrating functions to improve capability, cross-training for better performance, and shifting from reactive to proactive strategic communications. To achieve this, university Chief Marketing Officers (CMOs) have played a vital role in promoting annual planning and setting measurable marketing goals. This effort has improved departmental reputations, balanced workloads, and reduced peak pressures during the academic year.

ADAPTING LEAD-GENERATION PRACTICES

Many institutions can now comprehensively evaluate the results of test-optional admissions as students who were admitted while this trend swept through the industry are nearing graduation. In light of that, the fate of test-optional admissions is still unknown. However, the effects of this cultural shift are impacting a tangentially related component of many institutions' enrollment strategy: search. Lead volume and data that may accompany a lead, such as test scores, are shifting. Couple this with the increased challenges of reaching younger students due to changes necessitated by privacy laws, and institutions will need to think differently about how they source leads and nurture those leads through enrollment. A website built for conversion, a strong omnichannel presence with ample entry points available for students, and personalized interactions at every turn will be critical to ensuring strong conversion and enrollment.

REBOUND OF INTERNATIONAL ENROLLMENT

The percentage of international students in the US hit the highest mark in 2015 since the 1970s, but then began declining in 2016, hitting a low of -15% growth in 2020 during the height of the pandemic. However, international enrollment is again rising, with two straight years of double-digit application increases and a 20% growth in graduate enrollment across all fields. Undergraduate international enrollment increased by a modest 1% year over year, but is trending in the right direction.

China remains the top sending country, but India is the main driver of growth, with a 35% year-over-year increase. Together, these two countries account for 53% of all international students studying in the US. According to the 2023 Open Door report, 858,395 international students are enrolled in the US. While this is down from peak enrollment in Fall 2016 (903,127), it has rebounded since the height of the pandemic when enrollment dropped to 710,210 in Fall 2020. (These numbers represent total enrollment, which does not include those students still on F-1 visas who are on Optional Practical Training (OPT).)

POPULATION DEMOGRAPHIC SHIFTS

Nationally, demand for higher education is expected to fall sharply among Caucasian students through 2029. African American, Asian, and Other Pacific Islander; American Indian; and Alaska

Native college-bound student populations will see marginal increases or decreases through 2029 projections. While overall demand will fall in many regions throughout the US, growth is expected in domestic minority populations, such as Hispanic students and students who identify as two or more races. Marketing communications efforts must reflect more cultural sensitivities spanning racial populations. In addition, the college-bound wealth profile will decline, increasing pressure on the affordability of college investments.

PUBLIC UNIVERSITY PRIVATIZATION

As a result of the loss of state funding, many public universities are adopting strategies previously only employed by the best private universities, such as aggressively recruiting out-of-state students, using complex scholarships and financial aid leveraging models, developing more fundraising support through foundations, and rapidly responding to market needs. Economic changes in recent years may result in higher need profiles. Universities must lead with strategic awareness and increasing sensitivity to the regions most affected by these trends.

ENROLLMENT MARKETING TRENDS

FOCUS ON BRAND & CONSISTENCY

Brands pay more attention to reputation development and management tactics than ever before as market share dynamics continue to evolve and impact entire industries. Centralizing operations has improved many institutions' capabilities to tackle the challenges of enterprise-level identity, reputation, and awareness in ways that were not possible even a decade ago.

VALUE OF PSYCHOGRAPHIC DATA

The strategic use of psychographic-data collection and the development of communication-segmentation strategies enable colleges and universities to recruit prospective students using personalized messaging that incorporates a prospect's personality, what drives them, and what institutional characteristics they care about most. Pairing that psychographic information with geographic and demographic household data establishes an alternative means to identify and recruit students of increasingly diverse backgrounds and identities.

AUTHENTICITY DRIVES AFFINITY

Younger generations respond best to ads that do not feel like typical ads but instead communicate authentic stories. For 86% of consumers, authenticity plays a critical role in deciding which brands to support. More than logic, emotions largely drive purchase decisions, with 95% of decisions happening subconsciously. Therefore, institutions achieve better results when they invest resources in authentic storytelling that prioritizes personal communications, user-generated content, and other "story-living" efforts that allow them to connect with their target audiences personally and emotionally.

REPUTATION MANAGEMENT STRATEGIES VIA INFLUENCERS

Influencer marketing strategies can greatly aid reputation management efforts in higher education, given their success in the business sector. Satisfied alumni and current students hold the potential to serve as powerful influencers for their institutions. Since prospective students generally spend over 25 hours researching options online before applying, using student and alumni influencers to share their personal experiences online can cut through the noise and positively impact reputation and brand affinity.

VIDEO CONTENT EXPECTATIONS & OPPORTUNITIES

The State of Video Technology Report shows that 90% of Gen Zers want more video from brands, but many report they don't receive much video communication at all. Carnegie found similar results among fall 2023 incoming college students who reported spending time on multiple video-based channels but having low recall of content from colleges and universities on these same channels. Video content is an opportunity space for colleges and universities—one that could set an institution staunchly apart from its competitors if it were to meet the growing demand among prospective students. However, video production will get increasingly tricky as AI and other technology continue to impact how media is produced and consumed. Students give mixed reviews about their appetite for AI-generated content, but given that most of the market continues to demand more personalized, interactive, and AI content, it's likely this trend will continue to impact higher ed's target audiences. To keep up, it will be important to consider where your institution can increase its video-based communications and how best to optimize those videos to compete in a world soon to be dominated by next-generation video technology.

COMMUNICATIONS FLOW AUTOMATION & PERSONALIZATION

Automating campaigns by specific prospects or stages of a cycle is becoming increasingly important as segmented marketing becomes more complex and competes for Gen Z's attention. Institutions can also now identify and target audience segments using psychographic and demographic data, allowing them to respond with custom marketing content in a way that was not financially feasible in the past. By automating and personalizing campaigns, marketers can focus on adapting content and driving conversion rates instead of executing communication timings. This shift will, in turn, help drive efficiency, accuracy, and performance.

DATA, DIGITAL & WEB TRENDS

AUGMENTING THE CRM WITH A CDP

Many brands across sectors—including higher education—have adopted Customer Relationship Management (CRM) tools, which enable the regular deployment of segmented communications and drip marketing campaigns with exceptional capabilities related to tracking and variability. Supplementing the CRM with a Customer Data Platform (CDP) helps aggregate a user's touchpoints and interactions in digital and physical spaces into a more robust user record. CDP records unify

each user's session activity, marketing touchpoints, and actions, enabling more personalized communications across social networks, email campaigns, web platforms, and more. The robust data collection also provides an unmatched view into marketing attribution, helping institutions identify the channels and campaigns driving their desired business results. CDPs typically use first-party cookies for tracking activity, so with the upcoming deprecation of third-party cookies, CDPs will be spared, at least for now.

DIGITAL PLATFORM

Instagram was the most used platform for the graduating class of 2023, but TikTok is gaining and is now in the second slot. Many of the platforms currently in use emphasize video content. Despite changing trends in platform usage, many students aren't seeing as much advertising on platforms like YouTube and TikTok as they are on Facebook and LinkedIn, the latter of which is perceived by traditional undergraduates as an obsolete platform (graduate, adult, and online audiences still use it with some regularity).

A Carnegie-led content analysis of TikTok accounts in higher education revealed that most institutions are underutilizing the platform. (Some are *unable* to use it due to state legislation.) The accounts that perform well include content outside of standard college admissions information. However, many students still trust other students more than an institutional account, and activity levels on an official account were not seen to be correlated with account following, creating a difficult decision about use cases for TikTok as a direct account. Advertising on the platform is still advisable due to the volume of age-relevant traffic.

CORE WEB VITALS AFFECT SEO

In the summer of 2021, Google incorporated new metrics relating to page speed and user experience into their organic ranking algorithm, Core Web Vitals. These vital signals are part of the broader Page Experience evaluation Google uses to measure a user's browsing experience on a web page. To be in good standing with Google, a website must pass all three Core Web Vitals metrics—Largest Contentful Paint, First Input Delay, and Cumulative Layout Shift. Websites that aren't in good standing in these three areas will likely see a decrease in search engine visibility and organic traffic. On the other hand, websites that pass these tests will see a boost in search results and gain a competitive edge. Ultimately, Google aims to deliver search results that provide a positive user experience. Therefore, college and university websites should adhere to Core Web Vitals' best practices to enhance their search engine optimization (SEO) and user experience, which can lead to users spending more time on their sites and having a positive impression of them.

AUTHORITATIVE & USEFUL WEBSITE CONTENT

With the rise in web misinformation, Google emphasizes the principle of "E.A.T.": Expertise, Authoritativeness, and Trustworthiness. Higher education institutions have a huge advantage in this space, as Google already sees .edu domains as authoritative. However, institutions should focus on creating more in-depth website content. Maintaining robust blog and news sections and creating thought-leadership content and resources for program pages (such as an article exploring

“Top 5 Careers to Pursue with an MBA”) will improve search engine visibility and build brand awareness and trust with audiences.

IMAGE & VIDEO OPTIMIZATION

Image and video optimization have long been overlooked, but these SEO opportunities are now gaining attention as concerns about accessibility and ADA compliance grow. Optimizing images and videos improves their search engine visibility and enhances accessibility for users who use screen readers. Additionally, optimized images and videos increase the chances of appearing in special search engine results pages (SERP), such as rich snippets, video results, and Google’s Discover feed.

GOOGLE ANALYTICS 4

Google Analytics 4 (GA4) replaced Universal Analytics (UA) on July 1, 2023. The complete shutdown of UA is planned for the week of July 1, 2024, at which point all UA data will be deleted and properties will no longer be accessible.

GA4 embodies a new age of measurement that operates in a privacy-first, cookieless environment and uses an event-based data model for tracking. This contrasts sharply with Universal Analytics, which depends on cookies and measures independent sessions and pageviews. Google’s official announcement states that Google Analytics 4 applies advanced machine learning models to provide “a more complete understanding of how customers interact with a business.”

LOCAL SEARCH ENGINE PROPERTIES

Local search properties—like Google Business Profile (GBP, formerly Google My Business)—significantly attract potential students to an institution’s location. When optimized, GBP improves visibility in search results, including local packs and college packs. The local pack appears at the top of Google search results for location-based queries, usually showing three listings at a time with a Google Map view. The college pack displays card listings of various institutions that meet search criteria in a carousel format at the top or bottom of the SERP. Recent studies reveal that GBP accounts for 25% of Google’s local ranking algorithm, and optimizing it improves visibility in regular organic search results. Many institutions have multiple GBP profiles for departments, colleges, or satellite campuses. By claiming and optimizing these properties, institutions can control how a brand appears in a Google search and enhance its visibility.

CONNECTED TV OFFERS UNPARALLELED PRECISION

Connected Television (CTV) and Over The Top (OTT) content are now integral to the media landscape. CTV and OTT are video content accessed through streaming internet connections. They are no longer considered an emerging channel, as most American households subscribe to at least one video streaming service and 71% use OTT services monthly. These platforms offer unprecedented advertising dynamism and precise targeting, combining the advantages of TV with digital advertising. OTT video ads are displayed in high resolution, cannot be skipped, and are highly effective in reaching younger audiences.

THE PERSONALIZATION OF WEBSITES

Websites continue to be vital communication tools between institutions and their audiences to such an extent that 70% of potential students visit an institution's website at least two weeks—and often closer to two months—before taking action. A 2021 McKinsey survey of consumers showed that 71% expect personalization from business communications, products, and services, and 76% get frustrated when they don't receive it. According to the survey, consumers associate personalization with "positive experiences of being made to feel special."

Personalized content on websites can be displayed via homepage takeovers, where the entire page is auto-populated with content a specific visitor would want to see. For example, a student who just received their acceptance letter visits the institution's home page and sees content related to the program they were accepted to, plus calls to action for next steps in the enrollment process (like registering for orientation or submitting a deposit). This personalization can also be simple pop-ups with personalized messaging and calls to action for the visitor. For example, an inquiry might receive messages about submitting their application or registering for an event.

A PRIVACY-FOCUSED DIGITAL WORLD

Many state and global government legislations now regulate consumer privacy. The EU's General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) ensure privacy for consumers. Although the two laws are different, they both aim to give consumers a choice in how they are tracked across the web and how their personally identifiable information (PII) is used. While the US currently doesn't legislate consumer privacy, hardware and software manufacturers are taking matters into their own hands. In 2023, four states (Colorado, Connecticut, Utah, and Virginia) began enforcing policies akin to the European Union's sweeping GDPR.

Adding to their 2021 rollout of Intelligent Tracking Prevention, Apple further solidified its commitment to consumer privacy in 2023 by introducing Link Tracking Protection. This new feature will remove trackers appended to URLs from the links users share in Messages and Mail.

Additionally, Google plans to eliminate third-party cookie use in Chrome sometime in 2024, guaranteeing a fundamental change in how digital marketers target users and measure campaign performance. Already, Safari and Firefox have nearly eliminated third-party cookies in their browsers and have severely deprecated first-party cookies when the traffic referrer is from a known tracker, such as Google or Meta. Alternatives to third-party cookies are still in development via The Privacy Sandbox. However, it's unclear if browsers and ad tech partners other than Google will adopt this technology. Marketers should continue focusing on first-party data collection and use while ensuring their CRMs or CDPs are configured to maximize attribution and reporting, as they will likely be relied on as the "source of truth" more than ever.

TARGETING RESTRICTIONS

Many ad publishers are creating stricter advertising policies to protect vulnerable audiences, such as teens, and to prevent precise targeting parameters from being exploited for harmful advertising purposes. For example, on both Meta and Google, advertisers are limited to only age and location

targeting for users under 18. Additionally, behavioral/interest targeting, remarketing, and other custom audiences, such as list uploads, can no longer be used to reach minors. These platforms also prevent advertisers from using sensitive data (e.g., race, religious affiliation, political affiliation, or sexual orientation) to show ads to users. Originally meant to protect user privacy, this policy is having an adverse effect on religiously affiliated institutions—effectively not allowing marketers to reach their most valued prospective students on Google and YouTube. Marketers must now resort to Demand Side Platforms (DSPs) for traditional display remarketing, which can be out of reach for small advertisers without the help of an agency.

Investing in SEO will be critically important to make up for any lack of ad visibility that may arise from restrictions on religious institutions' digital advertising targeting and the deprecation of third-party cookies. Ensuring content is optimized with target audiences' keywords can help an institution rank higher in search results organically.

WHAT'S OLD IS NEW AGAIN IN MARKETING MEASUREMENT

Many digital marketers have come to the realization that Multi-Touch Attribution (MTA) never was, and never will be, the reliable and deterministic marketing-measurement solution they thought it was. Consumer privacy laws and restrictions—in particular the severe deprecation of third- and first-party cookies, and walled gardens like Meta and Google becoming even more protective of their proprietary data—have forced marketers to return to tried and true probabilistic marketing-measurement solutions that have been around for decades, such as Incrementality Experiments and Marketing Mix Modeling (MMM). These solutions are different but have one major thing in common: no Personally Identifiable Information (PII) is required to run effective analyses of marketing performance. Incrementality Experiments offer more granular and tactical insights and optimization opportunities for individual campaigns, while MMM is a statistical model providing a comprehensive look at effectiveness across all marketing channels.

GEN Z TRENDS

CHARACTERISTICS OF GEN Z

Since 2018, every student of traditional undergraduate age belongs to Gen Z. Higher education marketing must tailor its strategies to meet Gen Z preferences until those born in the 2010s, Generation Alpha, reach college age. Gen Z is characterized as “app natives” who are realistic and driven, prefer hyper-custom content, and blend the physical and digital realms. Despite their technological savviness, members of Gen Z value authentic relationships.

A GENERATION OF REALISTS

Many students of Gen Z have experienced more financial hardships than previous generations. They've become highly pragmatic in their decision-making and more likely to focus on the cost of higher education and scholarship opportunities. Affordability is a priority, but they may react negatively to “affordability messaging.” Financial security and successful career development

remain a concern with Gen Z, especially since 2020. Their realism also manifests in a widely held belief that higher education is just one method for securing the tools needed for employment. Therefore, institutions need to articulate the value they provide to students, employers, regions, and the world—highlighting career outcomes and traditional values such as a broad-based or liberal arts education.

DRIVEN TO ACHIEVE

Gen Z follows the mantra, “Work smarter, not harder.” They are driven, hard workers who are focused on achievement—and they only accept recognition when warranted. Gen Zers are highly aware of how they are perceived on digital and social media platforms, and they curate their online images to outperform others in their spaces and fields. Despite their love of experiences, they are astute and practical.

GEN Z EXPECTS HYPER-CUSTOMIZATION

Gen Z is particularly fond of customizable experiences, platforms, and vessels for expression, having always lived in a world where one size doesn’t fit all. When job opportunities don’t meet their desired level of customization, Gen Zers prefer to start their own businesses to create things according to their vision. Customizable courses and degree tracks are valuable in attracting these students. The rigidity and non-flexibility of concepts, such as general education requirements, don’t meet their needs for customization.

LIVING LIFE BETWEEN THE PHYSICAL & DIGITAL

Gen Z thrives in the space between physical and digital modalities. While digital moments are a cornerstone in Gen Z communications, they equally appreciate physical experiences. Members of Gen Z might value community but can experience it through a digital or physical space. Online courses are considered interchangeable with traditional classes, so technologically sophisticated institutions are more likely to attract Gen Z.

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