



We get you

BU

Selling the dream

Messaging trends in
higher education reviewed

ALTO

AUSTRALIA & NEW ZEALAND
2023

Alto have created this review to better inform the work we do with education and knowledge sector brands.

We hope it provides useful insight.

Who we are

Alto specialises in creative brand, marketing and communication design for the education and knowledge sector.

We connect people with knowledge, and knowledge with people.

What we do

We help organisations find the right message, and connect it to market—to boost awareness, build better customer experiences and inspire more action.

From local start-ups to global institutions, we work with brands that strive to innovate, are driven to deliver exceptional experiences and aren't afraid to stand out.

Hello again!

In 2018, Alto conducted a report into the messaging trends in higher education marketing campaigns.

Five years and a global pandemic later, we decided it was time to revisit the project, refresh our findings and talk to some industry experts to find out where the market is at.

Are there any new and emerging trends? Has there been a 'pandemic effect', and what might that mean for the future of brand and marketing in the sector?

Here's what we found.

Contents

Trends	5
Insights	6
Review	8
Opinion	25
Opportunities	29
Last word	32
Bonus: Brand discovery checklist	33
Appendices	34

Trends

Of Australia & New Zealand’s university brands, we found that most used one of eight messaging themes in 2023—one more than our previous review in 2018.

2018 vs 2023

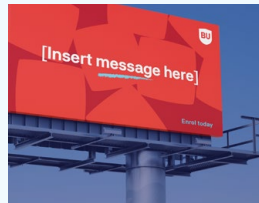
Trend shift

RANK	BRAND MESSAGING THEME	MARKET SHARE	RANK	BRAND MESSAGING THEME	MARKET SHARE	RANK SHIFT	% SHIFT
Equal # 1.	Inspiration	21%	# 1.	No Message	21%	↑ 4	+15%
Equal # 1.	Future	21%	# 2.	Inspiration	19%	↓ 1	-2%
# 2.	Think Differently	18%	Equal # 3.	Think Differently	14%	↓ 1	-4%
# 3.	Passion & Purpose	16%	Equal # 3.	Future	14%	↓ 3	-7%
# 4.	Practical Action*	12%	# 4.	Passion & Purpose	12%	↓ 1	-4%
# 5.	No Message	6%	# 5.	Empathy	9%	⬢ New	–
# 6.	Features	4%	# 6.	Practical Action*	7%	↓ 2	-5%
# 7.	Adventure	2%	# 7.	Features	4%	↓ 1	–

* Formerly labelled ‘Jobs’ in 2018 report

Insights

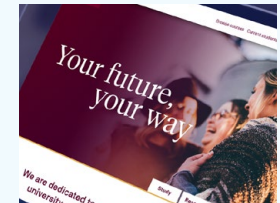
The rise of ‘no clear brand message’



The most remarkable finding in 2023 was the lack of an obvious brand or campaign messaging. There were more universities without a campaign—categorised as ‘**No message**’. 21% have chosen this approach, with the next most popular theme, **Inspiration** at 19%.

With almost one in five opting for no key brand level message of why a student should choose them over their competitors, is the brand level messaging approach out of favour?

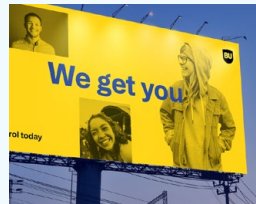
Inspiring messages stay, Future messages fade



Inspiration was one of the most popular themes of the last report, and has held steady at around 19% of the market.

In contrast, the perennial favourite theme of **Future** has dropped from equal 1st—with 21% in 2018—to equal 3rd in 2023 representing 14% of the market.

The emergence of Empathy



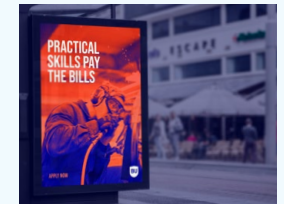
Empathy is a new messaging category that has emerged, representing 9% of the market. These campaigns take a more student-centric approach, suggesting the university has a deeper insight into the wants and needs of the individual—their hopes, dreams and fears—and knows how to optimise the learning experience for each person.

There was a notable absence of this kind of messaging in our 2018 review, where we called out the opportunity for brands to focus on the **Experience** as a point of differentiation:

Designing better experiences means being empathetic to the needs and wants of the humans at the centre of the experience. [...] Following trends in other sectors towards better customer experiences and service design, we anticipate more emphasis will be put on the holistic education experience as a key point of brand differentiation. This will become increasingly important as a less linear, more tailored approach to the individual's personal learning journey continues to emerge.

– Quoted from 2018 *Selling the Dream Report* (ALTO)

University and VET: Apples and Oranges



Finally, after conducting our 2023 review of brand positioning statements and campaign marketing messages of over 100 tertiary education brands—universities and VET providers—across Australia and New Zealand, we decided to remove Vocational Education and Training (VET) institutes from our findings. Why?

Across Australia's VET or TAFE landscapes, 'brands' are a mixture of combined state brands, university aligned brands and independent brands. In states and territories where there is a single TAFE 'brand', there is no need for distinctive brand campaigns, as there is no competition amongst themselves. Where aligned to universities, VET brands usually piggyback on the university brand or campaign.

The result was we weren't comparing apples with apples, and the most popular campaign messaging theme for VET in 2018—Jobs—was skewing the findings. Accordingly, in this edition we have reframed the **Jobs** theme as **Practical Action** for messaging that is more 'action' than 'academic'.

Review

What are the messages and the meaning behind them?
To uncover what rational, emotional and psychological levers university brands are pulling to influence choice, we looked at the campaigns through two lenses:
Rational vs Emotional and *Hierarchy of Needs**

*For more information about our approach, refer to the Appendices



#1.

No message

No message—
No obvious brand or
campaign messaging,
or consistent slogans.



1st – 21% of market
5th in 2018

Messaging analysis

No obvious brand or campaign messaging, or consistent slogans.

The most remarkable finding in 2023 is the lack of an obvious brand or campaign messaging, representing 21% of the market.

With almost one in five opting for no key brand level message of why a student should choose them over their competitors, is the brand messaging approach dead?

Or are some marketing departments unable to deliver the high-quality, high-budget campaigns of the past without pre-pandemic marketing budgets and personnel due to losses of international students and revenue?

Watch this (blank) space.

Driver analysis

In the absence of a clear message, the student is left to make their judgement on what the brand promise might be.

This approach may be fine for 'prestigious' universities where their positioning in the market is relatively well established from decades of marketing and brand awareness investment.

However, for a challenger institute that is lesser known to potential students, reverting to 'no clear brand message' during the pandemic could be seen as a missed opportunity.

Perhaps now is the perfect time to establish a more meaningful message while most of the market remains lost for words.



5 1 4 6 0 1

Follow
your
dreams

APPLY NOW



2.

Inspiration

Inspiration—
 Messaging that encourages students to do or feel something. To aspire for more and follow their dreams.



2nd – 19% of market
 Equal 1st in 2018



Emotional



Self-actualisation

Messaging analysis

Inspirational themed campaigns champion an optimistic outlook, encouraging the individual to become their ideal self—to make the most of opportunities and achieve aspirational feats, while positioning the university as the doorway to opportunity.

Inspiration messaging is often general and non-specific, letting the individual project their aspirations into the space while highlighting the role of the university in supporting students through personal growth and development to achieve their ambition.

In some examples, universities leverage this theme by showcasing successful alumni who have followed their dreams and achieved their goals as further inspiration and proof.

Driver analysis

Follow your dreams, whatever they may be.

Campaigns built around the inspirational theme place an individual's **emotional** needs at the forefront of the decision-making process.

They send messages of encouragement and motivation—telling the viewer to believe in themselves, to aspire for more than just the status quo and realise their potential.

Viewed through the lens of 'Maslow's hierarchy of needs pyramid' it sits right at the level of **self-actualisation** (see Maslow's hierarchy of needs in appendices).

The 'follow your dreams' approach may also appeal to mature age 'career changers'. Those dreaming of personal growth and self-fulfilment—taking the next step up the ladder.



Equal # 3.

Think Differently

Think Differently—
Messaging that refers
explicitly to new or
novel ways of thinking,
tackling the wicked
problems of the world,
or challenging the
status quo.



Equal 3rd – 14% of market
2nd in 2018



Emotional



Esteem

Messaging analysis

The **Think Differently** theme invites prospective students to tackle global challenges or create new opportunities.

With so much conversation about uncertainty in the wake of the pandemic, **Think Differently** sends out a motivational message—to step forward and become an agent of change, rather than a casualty of it.

It speaks to a growing desire among students for an education that is innovative, creative, forward-thinking, and to harness the power of science and technology.

Think Differently positions the university as a thought leader, creating differentiation from other institutions by building a strong reputation as a leading provider of cutting-edge education.

Driver analysis

Don't like the rules? Change the game.

Think Differently is a call to solve the world's problems with the power of knowledge and appeals to those with a curious mind—the aspiring entrepreneurs, change-makers, disrupters, startups and upstarts.

It reflects the growing importance of innovation, creativity, and forward-thinking in education, and appeals to prospective students who are seeking a dynamic and unconventional learning experience.

It pitches the learning experience as a place to explore and discover. It will require confidence and **self-esteem**. It may be tough at times, but the effort will be rewarding.

The world needs you!



Equal # 3.

Future

Future—
Messaging that is
specifically future-focused;
embracing the future or
being prepared for the
uncertainty of tomorrow.



Equal 3rd – 14% of market
Equal 1st in 2018



Emotional



Self-actualisation



Esteem



Safety & Security

Messaging analysis

Future themed messaging swings between positively empowering potential students to embrace *their future*—which formed the majority—to subtly sowing the seeds of doubt and unpredictability about *the future*.

Both ends of the spectrum make prospective students feel like they are mitigating risk by choosing a progressive provider that will best prepare them with the skills and knowledge to succeed.

Universities emphasising their commitment to preparing students for the future, are positioning themselves as thought leaders in their fields, focused on providing cutting-edge education that is relevant and responsive to the changing needs of society.

This theme has dropped in popularity since the pandemic. Why? Is it because it's hard to prepare for the future in a time where there is so much unpredictability?

Driver analysis

Prepare for *the future*—or prepare for *your future*? Both speak to a growing concern among students about their future prospects in an uncertain and rapidly changing world.



Prepare for *the future*

The future is uncertain, and being prepared for it plays on people's basic human need for **security and safety**. Promising to prepare individuals for *the future* subtly addresses their fear of uncertainty and presents education as a solution. In this context, the emotional lever being pulled is fear.



Prepare for *your future*

Messaging that focuses on *your future* turns the needle inwards and requires one to self-reflect. Climbing further up the pyramid to psychological needs like **esteem** and sometimes even as high as **self-actualisation**. Rather than using fear of the unknown as the motivator, this type of campaign messaging tends to be more positive, focusing on what could be possible.



**FOLLOW YOUR PASSION
LEAD WITH PURPOSE**

Apply Now

#4.

Passion & Purpose

Passion & Purpose—
Messaging that speaks
to one's inner sense of
passion and purpose—
to follow their heart,
make a difference,
have an impact, or do
what they love.



4th – 12% of market
3rd in 2018



Emotional



Self-actualisation



Esteem

Messaging analysis

Passion & Purpose themed messaging encourages the individual to follow their core values, skills and interests—and use them to create a positive impact in the world around them, whether locally in their community or on a global scale.

By emphasising the connection between education and purpose, universities are positioning themselves as committed to promoting student success, both academically and personally.

This messaging follows a broader trend in business towards purpose-led brands, while alluding to personal success in the spirit of 'if you do what you love, you will never work a day'.

Sub-themes of social justice, leadership, social responsibility, equality, determination and resolve are also evident in the messaging.

Driver analysis

Follow your heart and do good for the greater good.

Passion & Purpose-themed messaging requires an individual to self-reflect and to ask some of life's most difficult questions: 'how can I make a difference in this world?' or 'what do I truly care about?'.

To follow your passion requires a level of **Self-Esteem**, whereas striving for a sense of purpose reaches further towards the highest level of **Self-actualisation**.

Through a positive and motivational tone, this type of message pulls at the heartstrings—targeting an individual's **Emotional** drivers to inspire action—and speaks to their desires to pursue their passions, make a positive impact in the world, and find fulfillment and purpose in their education and work.

REVIEW



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5.

Empathy

Empathy—
Messaging with a
student-centric approach,
suggesting the university
has a deeper insight into
the wants and needs of
the individual.



5th – 9% of market
New theme



Emotional



Love & Belongingness

Messaging analysis

We see you. We understand you.

We're for people just like you.

Many brands in the corporate sector have adopted a human-centred approach for some time. And now, the theme of **Empathy** is finally emerging in higher education marketing—a new comer in our report with 9% of the market share.

These campaigns have a more student-centric approach, suggesting that the provider has a deeper insight into the wants and needs of the individual—their hopes, dreams and fears—and knows how to optimise the learning experience for each and every person.

There was a notable absence of this kind of messaging in our 2018 review, where we called out the opportunity for brands to focus on the 'experience' as a point of differentiation:

"Following trends in other sectors towards better customer experiences and service design, we anticipate more emphasis will be put on the holistic education experience as a key point of brand differentiation. This will become increasingly important as a less linear, more tailored approach to the individual's personal learning journey continues to emerge."

- *Selling the Dream 2018*

Driver analysis

Genuine empathy involves understanding and sharing the feelings of others, which pulls an **Emotional** lever.

Empathy is one of the rare campaign themes that attempts to tap into Maslow's hierarchy of needs at the level of **Love & Belongingness**, which emphasises developing "friendship, intimacy, trust" and "affiliating and being part of a group."

This kind of brand messaging aims to attract students who seek more than just a practical education. They may be looking for a sense of belonging and a supportive community that can foster their academic success.

A welcoming and empathetic brand message may suggest that the university is there to not only help students achieve their goals, but they can also fulfil their need for social connection and sense of purpose.

**PRACTICAL
SKILLS PAY
THE BILLS**

APPLY NOW



6.

Practical
Action

Practical Action— Messaging that puts employability first – careers, work, jobs, gaining experience, preparation, practical hands-on skills – or the ‘real world’.

Formerly labelled ‘Jobs’ in 2018 report



6th – 7% of market
4th in 2018



Rational



Safety & Security

Messaging analysis

Messaging that emphasises practical action and career outcomes helps prospective students feel like they are mitigating risk by choosing the provider that will transition them to paid employment sooner, with clearer pathways and stronger ties to industry.

Universities who put **Practical Action** first, differentiate themselves from other providers who may be seen as less practical or less focused on employability—for example those who choose to focus on **Empathy** or **Passion & Purpose**.

This can increase the student's perceived 'Return On Investment' of their university education, attracting those seeking a well-rounded, practical education that will prepare them for future success in the workforce.

It's worth noting that in our 2018 report, this theme was labelled ‘Jobs’ and was a clear winner for the vocational education sector. However, for universities this type of messaging isn't as common, and as a result, has lost some market share.

Driver analysis

Practical skills pay the bills.

Rationality is the driving force here, while emotive aspirational messaging takes a back seat.

By emphasising the practical, hands-on, and career-focused aspects of their education, universities are appealing to prospective students who are seeking a practical, relevant, and employable education.

This messaging targets prospective students' basic human needs of **Safety & Security**, making them feel confident that they will transition quickly from study to work, and be able to successfully provide for themselves in the future.

15 yards away, but he had no time to think of defence. If he had any time to think about protecting his wicket as he swung round to get back in his crease, that consideration must have been second. It is regrettable that on-field Kumar Dharmasekera and Tim Robinson, who were both in a position to see Stokes's reaction, did not reach a decision by themselves and trust their own judgment. Instead, they referred to the third umpire, Joel Wilson from Trinidad. Wilson, who has been an on-field umpire in one Test match, in Bangladesh, watched the slow-motion replay and concluded that Stokes had "wilfully" obstructed the field. The Australians had every right to appeal: they always play by the rules, a far less nebulous code than the Spirit of Cricket. But Stokes had every right to a fairer, more discerning, hearing.

England still had a chance of levelling the series at 1-1 when Stokes was out, as Eoin Morgan had played

Flashpoint: Mitchell Starc hurls the ball at the stumps with Ben Stokes out of his ground. Top: Stokes shows his anger as he strides on an arm, which the ball hits, and then falls to the ground.

himself in and was soon to accelerate, finishing with 85 off 87 balls. But it was only an outside chance as they had already made the same decisive errors as in Southampton.

In the first international England's four right-arm seamers had taken one wicket for 208 runs off 32 overs. Their figures here looked better after Stokes had taken three wickets with his last seven balls, but the reality was that they took one wicket in the first 39.5 overs after England had sent Australia in on a damp morning.

The full-length ball seamed

around even if, being white and Australian, it did not swing. There were wickets to be had, but England did not have the firepower to take them; and thus the game was lost. Steve Finn, on his home ground, did his part in the sense that he took the only wicket that fell to England's seamers before the 40th over: a fine ball that came down the slope to bowl Joe Burns. But he was too short overall in his opening, formative spell.

Finn also dispatched, if not dismissed, David Warner by fracturing his left thumb with a pin-point

bouncer. Warner had a productive summer without ever making a competitive century, as England always somehow reined him in. Liam Plunkett was brought in to supply the extra pace that Mark Wood was unable to provide at Southampton, and Plunkett would have had a wicket if Morgan had posted a slip when Glenn Maxwell came in.

Chris Woakes was rightly given the new ball, but could not swing it, and given the death overs, when he delivered his yorkers excellently. But, for actual wickets, England had

bright start. He dropped twice off high-risk shots. He does not have the weight of stroke to hit boundaries against the new ball, whereas Moeen Ali has only to play normal cricket strokes. Taylor's special skill is manoeuvring the ball in mid-innings at four or five.

Starc was subsequently booed by the capacity crowd, and cheered when he dropped Morgan but, after a final fling of 55 from 22 balls, he silenced them by yorking Plunkett.

ALTO 29
England to start to the Australia, they kept so that no batsman went out. century that the conditions ed, and they had no Matthew Root, who had made three dreds in his past seven OD almost as much as spectators having thermals after sunrise. Jason Roy was partitioned to get himself OD passed his highest OD Roy's dismissal England behind the requirement Taylor was inventing had reached 49 in England tried such a high-risk



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Last-o
T20 Inter
ENGLAND
Australia b
finish to a
national i
Captain
superb 7
home to
spite a
skipped
side f
Ben
off

Features—
Messaging that explicitly
references ‘product’
features and benefits.
– courses, facilities,
resources, awards, etc.



7th – 4% of market
6th in 2018



Rational



Safety & Security

Messaging analysis

Wearing your features on your sleeve.

A small number of providers take a more conservative and traditional approach, and lead their messaging with the *what*, rather than the *why*.

One reason might be that the institution already has a well-established reputation and brand recognition, and therefore feels less of a need to communicate its brand essence and differentiation.

Some may find that a more straightforward and fact-based approach resonates well with a certain segment of the student population, such as those looking for a university that has a proven track record or ranking, or those with a strong interest in a specific field of study.

Others may have limited resources or in-house marketing expertise, and find it challenging to develop a unique or distinctive brand message, and instead opt for a more straightforward approach.

Driver analysis

One of the aims of selling features is to build confidence by showing the proof rather than making a promise for the future. It makes the student feel **Safe & Secure** in the knowledge that they are making a sound choice based on facts.

This kind of approach to messaging appeals more to the **Rational** mind through specific, tangible features of the product offering.

Opinion

With almost one in five institutions opting for no key brand level message of why a student should choose them over their competitors, is the brand messaging approach dead?

We thought we'd ask some experts for their opinion.



Maxine Day

BRAND STRATEGIST | MARKETING LEADER
10+ YEARS EXPERIENCE IN EDUCATION MARKETING

What impacts has the pandemic had on marketing in the higher education sector?

The institution I was working for had to do a real pivot. Recognising that the existing brand message wasn't going to resonate with a market that was more concerned if they would still have a job next week, let alone invest their time and money in a long-term degree. I saw the brand campaigns change to speak to changes in customer needs.

Reflecting back, I think people are still after the same things – security, opportunity, careers, experiences, to meet like-minded people. But perhaps the weighting of these drivers has changed. And the way we market needs to reflect that.

Why the increase in 'no clear brand message'?

As a result of the pandemic, many marketing assumptions have been thrown out because the world has changed so much for people. The rise of 'no strong brand message' may reflect the sector losing touch with what the consumer truly wants, and perhaps it is still trying to work out the right messaging mix. It's almost like they're in a holding pattern.

The reality is there's an emotional toll in living through a pandemic. If you could speak to these emotional drivers effectively, that would surely be a really positive way to alleviate people's concerns and help them see a better future.

Thoughts on the emergence of the empathy theme?

I've seen institutions in the past adopt a friendly, welcoming – 'you belong here' – type message but this didn't shift the market or significantly change customer preferences. Sure, a segment in the market does want this, but it was never big enough to make it an impactful marketing strategy.

Maybe the pandemic has changed all this? Purchasing trends and values have definitely shifted and perhaps now's the time for these sorts of messages and campaigns.

Ongoing challenge for higher ed marketing?

There have always been similarities in how institutions market their brand, and it becomes really tough for providers to get the cut-through needed to own a unique position in the market. Shifting preconceived, deeply held market perceptions can be incredibly difficult for a marketer.

A lot of effort goes into brand campaigns. In some ways, they're the most visual public execution for an institution. They can be really powerful and moving, but if that doesn't translate to the actual customer experience – for example, that first interaction a student has with the student call centre – you're shooting yourself in the foot. It's all well and good to have a strong brand campaign, but how you back it up is where the success lies. To succeed, brand and product need to be aligned. That's the holy grail.

To create your place in the market, the brand positioning must be consistent from the top down. If the positioning doesn't accurately reflect the experience you offer, then it won't carry gravitas.



Julia Turner

DIRECTOR OF BRAND & MARKETING
EDITH COWAN UNIVERSITY, WESTERN AUSTRALIA

What impacts has the pandemic had on marketing in the higher education sector?

There are many. One was the pressure on marketing departments to generate as many student enrolments as possible. With increased pressure coming from the faculties wanting to promote their specific product offering.

One way to do this quickly and cost-effectively is to increase advertising through digital channels. Hence the significant rise and focus on digital advertising from a product level across the sector.

Now in normal marketing circumstances, showing a consumer the right product, with the right message, at the right time—is essentially all you need to get them across the line. And to a large degree, that's still correct. But when everyone is doing similar forms of digital advertising, you have to find a unique way of differentiating your product from everyone else's.

This was the challenge. And this is where a strong brand level message comes into play. So while we do have a huge range of digital product advertising, we still have that core branding piece going across the top. Ours is about being World Ready. Not just job-ready, but World Ready.

Why the increase in 'no clear brand message'?

Firstly, we must be in the minority, as in we managed to maintain a clear brand message throughout the pandemic.

Why the increase? There is probably a multitude of reasons. One could have been that quite a few university brand messages were built around the notion that 'change is good'. And as experienced during the pandemic, change wasn't necessarily a good thing anymore—I'm not surprised that universities would have chosen to downplay that type of message during these times.

Another reason could be related to the increased digital advertising of products, mentioned earlier, in which space is limited and you need to convey the benefits of the course—it leaves little room for brand messaging as well.

Thoughts on the emergence of the empathy theme?

The pandemic triggered a considerable growth in empathy, not just in our sector but globally. Take a look at what happened on social media—people showing their support, reaching out to one another and genuinely being much more empathic.

Marketing, by its nature often tries to leverage what's happening out there in the community, to better connect with customers. So there's little wonder as to why we've started to see an increase in empathy as a theme. The pandemic triggered it, and social media popularised it.

The question is, how long will it last? Personally, I think it will continue to grow, considering one of our future key markets in the sector is Generation Z (born 1997–2012). We constantly hear that Gen Z's are into equity, inclusivity, authenticity, etc. Empathy delivers on these things.

Ongoing challenge for higher ed marketing?

An ongoing challenge that affects all marketers, in general, is the constant change to the digital environment. For example, the recent changes that limit tracking and the ability to target by interest almost feels a bit like 'back to the future.' We're going back to where things were twenty years ago.

For the higher education sector specifically, a significant challenge we still have is product differentiation. The reality is many universities offer pretty much the same set of products and arguably a similar set of experiences, so if we're trying to connect with our audience, then marketers need to deliver on the why - not just the what. The challenge is finding that why. Why should they come to us? That's the ongoing challenge for all. It's differentiation.



Xavier Amouroux

EXECUTIVE DIRECTOR, MARKETING & COMMUNICATIONS
QUEENSLAND UNIVERSITY OF TECHNOLOGY (QUT)

What impacts has the pandemic had on marketing in the higher education sector?

The first immediate impact was going into crisis management in early 2020. February is typically the time we welcome students onto campus. 2020 was different. We had to rapidly shift how we operate for the new environment and focus more on internal communications with students, staff, stakeholders, media and industry. It took great teamwork, dedication and trust.

The second impact was on student recruitment campaigns. We now had a new hybrid model of learning in place, which sparked a lot of questions about the student experience. For the sector at large, this led to many students considering deferring until things settled. Our focus was to reassure them that they would continue to have an excellent learning experience and to provide easily accessible online support.

The third impact came a little later. By the end of 2020, we could tell that the pandemic was here to stay for some time. This meant rethinking everything we were doing, like Open Days—now entirely online and supported by webinars, seminars, virtual events etc. This required a real shift in engagement, and we had to be very innovative in our approach. A positive was the opportunity we now had to connect with those who usually wouldn't be at an on-campus Open Day—people in regional centres, for example. Through innovation, we had developed new tools and platforms where these types could experience what life is like at QUT, ask questions and directly engage.

Why the increase in 'no clear brand message'?

It's difficult to comment on others, but when it comes to QUT, we are sticking to "The University for the Real World". It's our core claim and has remained true to our identity for 20 years.

When we do brand health surveys, we see massive attribution to "The Real World". To the point where if we don't even mention QUT, people will still recognise it's us.

What I've learnt from other industries is, if you change your claim every 2 to 5 years, there's little to no brand association. To be truly memorable, it needs to be kept for at least 8 to 10 years.

My personal opinion is that brands change their claims far too often. It's probably because we marketing folk are quickly bored by our own

creative and feel the need to refresh it. Let's put ourselves into the customer's shoes for a minute. They don't have to deal with our brand every day; for them, it's most likely fresh and new. That's why we stand by our brand claim. At QUT, we see the benefit of keeping ours consistent.

Thoughts on the emergence of the empathy theme?

Empathy is essential, particularly in our student communications. Our existing students have been through a lot recently, so it's our job to listen to their needs and see that they have all the necessary support for their studies. So they have an excellent student experience during these tricky times. That's how we use empathy, by listening.

Ongoing challenge for higher ed marketing?

Defining what makes you different from another university, as we all offer similar things.

It's our job to ensure that we are all seen to be listening and responding to the different needs of our people. Doing this gives universities enough diversity so that each student can find the best place to study for them.

The second challenge is the constant digital transformation of marketing. It's getting next level. To stay grounded, we tell our teams there's no distinction between marketing and digital marketing. We are all doing marketing, and digital is just a part of it. It's important to shift that mindset.

Opportunities

The landscape has certainly shifted in the last five years, and the pandemic has no doubt had an impact on the state of marketing in various ways.

Looking forward, what opportunities are there to bring new messages to the market?

Here are five trends we expect to see more of.

1

Specialisation

Working to your strengths.

Institutions that offer a broad range of courses across multiple disciplines often struggle to find a differentiated brand message. As a result, they tend to settle on fairly generic brand messages.

Rather than creating generalist high-level brand messaging as an attempt to catch all, institutes could place more emphasis on creating strategically focused faculty-level, or even program level messaging campaigns.

Doing this would enable brands to calibrate their messaging more finely to their desired market segment, with their own distinct voice and style that targets the hearts and minds of the *right* candidate, rather than *every* candidate.

2

Failure

The original incubator?

There is a strong trend towards innovation and entrepreneurship in higher education, both in application—the development of innovation districts, incubators and accelerators—and in marketing, as seen in the **Think Differently** themed campaigns.

The tech and start-up sectors celebrate failure as an essential part of learning. Can higher education fully embrace this notion as well?

Will the term ‘failure’ become less taboo in marketing vernacular? Will learning brands—traditional in their approach to brand and marketing—be bold enough to go there?

After all, what are higher education institutes if not places to fail safely?

3

A lifetime of learning

Higher education. Not just for young people.

Although our review showed that the majority of brand and campaign messaging is directed at young people, there is a much greater opportunity to widen the scope of the target market.

In their *New Work Order* report series, the *Foundation for Young Australians* predict that the average 15 year old will have 17 jobs across five different careers throughout their lifetime, with each new job and career will require new skills, knowledge or training.

There are opportunities to think more about the long game—to build long-term relationships and emotional connections through better engagement, and to retain students for much longer than just a three-year course.

4 Tribes & belonging

Where does belonging belong?

Are individuals looking for more than just a pathway to work from in their higher education experience? Should belonging to a community or a tribe play a greater role in messaging?

We know from other sectors that creating a sense of belonging leads to brand loyalty and advocacy.

Combined with the continuing fragmentation of ‘real-world’ communities, and the lingering effects of the recent pandemic—lockdowns, increased feelings of isolation and the impact it has had on mental health and well being—we expect there to be more emphasis on belonging to a community or tribe of like-minded individuals around higher education brands.

5 Experience

On campus to online.

The pandemic has permanently changed the student experience, forcing universities to take not only their curriculum, but their whole operation, online.

After years of becoming accustomed to remote learning and working, expectations of where, when and how an individual learns will become increasingly personalised.

Providing a best-of-breed online learning environment will be a key factor in attracting the students of the future who expect more from technology than ever before.

Last word

No clear brand message?

It's time to rediscover,
redesign and reconnect.

Undoubtably, the wide-reaching impacts of the pandemic has created significant challenges for universities to invest in brand building and marketing efforts. The knock-on effect of this might go some way to explaining the increase in “no clear brand message”—in an environment of uncertainty, shifting priorities and decreased budgets, it's difficult to put a stake in the ground and clearly mark a position.

The ongoing disruption in the education sector presents an opportunity to find new relevance—to break away from the pack and find richer, unique and more innovative ways to attract, engage and retain students. And not just for a few years, but over a lifetime of learning.

We believe the opportunity is here for education providers to rediscover their inherent strengths, redesign their offer for a new era, and reconnect with the needs, wants and dreams of the students of the future.

Bonus: Brand discovery checklist

Time to rediscover,
redesign or reconnect
your message?

Try Alto's 10 step
checklist, to get you
from go to whoa.



1. Define your Unique Value Proposition (UVP)

What sets your institution apart from others in the market?

2. Know your target audience

Who are you trying to attract and what are their needs, wants, and pain points?

3. Conduct competitor research

Analyse what other universities in your market are doing, what they offer and their messaging.

4. Evaluate your current branding

Are your brand messaging and visual identity aligned with your UVP and target audience?

5. Determine your brand personality

What is your brand's tone of voice, values and ethos?

6. Develop brand messaging

Craft compelling messaging that speaks directly to your target audience and reflects your UVP and brand personality.

Test and refine.

7. Create a distinctive visual campaign

Ensure your campaign visual assets are consistent with your brand personality, messaging and UVP.

8. Connect with your audience

Engage prospective students via multiple communication channels and brand experiences to build recognition and trust.

9. Monitor your brand performance

Continually monitor and evaluate the success of your branding and marketing efforts, and adjust your strategy accordingly.

10. Keep things consistent

Ensure all of your marketing materials, communications, and interactions are consistent with your brand messaging, visual identity and UVP.

Appendices

Research method

Previous research shows* that digital messaging is the front line of communication for prospective students, with 42% turning to the internet as the ‘best source of career advice’ in order to find information about their career and tertiary education options.

To discover and analyse the most prevalent brand positioning or campaign marketing messaging broadcast by higher education brands, we followed the same path that users typically take to learn more about their options.

Categorising themes

The process of grouping and sorting messaging into themes was based primarily on specific words. For example, messages that specifically named *careers*, *skills*, *work* or *employers* were grouped into the **Practical Action** theme.

Where messaging didn’t use specific categorised words, we looked at the semantics—the meaning behind the message.

Where messages contained a combination of words *future* and *work*, we prioritised the intent of the message.

The review did not start with predefined theme categories, these were developed iteratively as the review unfolded.

Timeframe

The review was conducted in November 2022. All content is correct and up-to-date to the best of our knowledge.

* Bisson, R. & Stubbley, W. (2017). ‘After the ATAR: Understanding How Gen Z Transition into Further Education and Employment’.

Analysis method

To analyse and compare themes, we explored the psychological drivers behind the messages through two different lenses.

Lens 1: Emotional vs Rational

Decision-making is influenced by rational and emotional motives.



Rational

These decisions are based on objective, practical or tangible criteria – such as profit, security or health.



Emotional

These decisions are more personal, based on subjective or intangible criteria – such as love, pride or vanity.

Lens 2: Hierarchy of Needs

Maslow's Hierarchy of Needs is a psychological theory that suggests that human needs can be arranged in a hierarchy, with lower-level needs needing to be satisfied before higher-level needs can become a motivator for behavior. The hierarchy is typically represented as a pyramid with the lower needs at the bottom and the higher needs at the top. We've reversed the order below, starting with the lowest level need first.



Need #1: Physiological – these are the basic, biological needs required for survival, such as food, water, air, and shelter.



Need #2: Safety & Security – once physiological needs are met, people seek safety and security, such as physical safety, financial security, and stability.



Need #3: Love & Belongingness – once safety needs are met, people seek social interaction and a sense of belonging, such as friendships, intimate relationships, and community involvement.



Need #4: Esteem – once a sense of belonging is established, people seek self-esteem, self-respect, and respect from others, such as status, recognition, and achievement.



Need #5: Self-actualisation – once all of the lower needs are satisfied, people seek self-actualisation, which is the fulfillment of one's potential and the achievement of personal growth and self-fulfillment.

* McLeod, S. (2018). 'Maslow's Hierarchy of Needs'. Simply Psychology. Available at <https://www.simplypsychology.org/maslow.html>

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