



In-State, Out-of-State, and International Recruitment:

How Higher Ed is Allocating Marketing Resources for Student Recruitment in 2024



Overview

Enrollify and our friends at Glacier have partnered together to uncover how higher ed marketers plan to allocate marketing resources to recruit in-state, out-of-state, and international students in 2024.

Our goal is to help you get a better sense of how other schools, similar in stature to the one you work for, think about marketing strategy and resource allocation for these strategic but distinct audiences.

In particular, we sought to understand:

- 1.** How graduate schools think about social media as a recruitment channel compared to undergraduate institutions
- 2.** How marketing budgets for student recruitment vary between graduate, undergraduate, and community college institutions
- 3.** How social media spend varies depending on in-state, out-of-state, and international student recruitment
- 4.** The countries institutions are looking to recruit from in 2024
- 5.** And the breakdown of expected applications from domestic vs. international applicants

Nearly 100 higher education marketers and enrollment managers across the United States and Canada responded to this survey. Should you have any questions about the data or analysis presented here, please don't hesitate to reach out to us at team@enrollify.org

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About our Respondents

70% of all respondents holding a Director, Vice-President, or C-Suite title

Our respondents held a variety of roles but skewed heavily towards folks in leadership positions, with nearly 70% of all respondents holding a Director, Vice-President, or C-Suite title.

Which of the following best represents your current role?

Role	Percent
Director of Marketing or Admissions	34.25%
Other	17.81%
VP of Enrollment or Marketing	15.07%
Chief Marketing Officer or Chief Enrollment Officer	12.33%
Assistant Director of Marketing or Admissions	10.96%
Graduate Program Coordinator	8.22%
Admissions Counselor/Coordinator	1.37%

Our respondents held a variety of roles but skewed heavily towards folks in leadership positions, with nearly 70% of all respondents holding a Director, Vice-President, or C-suite title. Therefore, the results indicated in this report skew toward the opinions of those in managerial and leadership positions at colleges and universities.

Just over 45% of respondents work at undergraduate institutions, with just under 44% working at graduate schools. The remaining 10.5% of respondents worked at community colleges or 2-year degree schools.

Percentage breakdown of survey respondents by institution type:

Institution Type	Percent
Traditional Undergraduate (4-year degree)	45.61%
Graduate schools	43.86%
2-year degree or diploma	10.53%

Marketing Spend by Institution Type

Graduate Level

The majority, 24%, reported spending between \$0 to \$50,000

Historically, graduate schools have had little-to-no budget for brand marketing and communications. We were interested in learning whether or not this has shifted in a post-pandemic, enrollment-cliff-impending world, so we asked respondents what their expected budgets for 2024 were looking like. The distribution of budgets varied — as one might expect.

The majority, 24%, reported spending between \$0 to \$50,000, followed closely by 20% allocating \$50,000 to \$100,000. Budgets of \$500,000 to \$1 million and \$100,000 to \$250,000 were noted by 16% and 14% of the respondents, respectively.

A smaller segment, 10%, indicated spending in the higher bracket of \$1 to 3 million, while another 10% were unsure of their budget. Only 6% of the graduate schools reported spending between \$250,000 to \$500,000 on Brand Marketing & Communications annually.

Perhaps most notable is that 44% of respondents at the graduate level still have less than \$50,000 to spend on marketing and communications initiatives in 2024, even as pressure for graduate programs to drive more enrollment increases.

"What is your approx annual budget for Brand Marketing & Communications?"

Annual Budget	Percent
\$0 - \$50k	24.0%
\$50k - \$100k	20.0%
\$500k - \$1MM	16.0%
\$100k - \$250k	14.0%
\$1 - 3MM	10.0%
Don't know	10.0%
\$250k - \$500k	6.0%

Graduate Level

We intentionally separated questions related to spend on marketing and communications initiatives with spend on enrollment marketing initiatives, as many institutions have separate budgets for marketing initiatives that are explicitly tied to enrollment.

We asked graduate school respondents what their expected budget for Admissions/Enrollment Marketing, and here's what we learned:

"What is your approx annual budget for Admissions/Enrollment Marketing?"

Annual Budget	Percent
\$0 - \$50k	26.0%
\$100k - \$250k	26.0%
\$50k - \$100k	12.0%
\$250k - \$500k	10.0%
\$500k - \$1MM	10.0%
Don't know	8.0%
\$1 - 3MM	6.0%
\$3-5MM	2.0%

The most common budget range, shared by 26% of the respondents, was at the lower end, between \$0 and \$50,000, surprisingly matched by an equal proportion at a significantly higher bracket of \$100,000 to \$250,000.

This suggests a bifurcation in spending strategies among the institutions. A more modest 12% of schools allocated \$50,000 to \$100,000, demonstrating a cautious yet committed approach to marketing investments.

Interestingly, the budgets then leap to higher figures, with both the \$250,000 to \$500,000 and the \$500,000 to \$1 million ranges being expected by 10% of the schools each. This indicates that a notable segment of institutions is willing to invest substantially in marketing efforts that are explicitly focused on attracting prospective graduate students.

The response to these questions also highlights uncertainty in budget allocations, with 8% of the respondents unsure about their marketing budgets, suggesting either a flexible approach or a lack of defined strategy in this area.

Undergraduate Level

"What is your approx annual budget for Brand Marketing & Communications?"

Annual Budget	Percent
\$50k - \$100k	17.31%
\$0 - \$50k	17.31%
Don't know	15.38%
\$100k - \$250k	13.46%
\$250k - \$500k	11.54%
\$1 - 3MM	5.77%
\$10 MM+	1.92%
\$5 - 10MM	1.92%

The annual budgets for Brand Marketing & Communications spent at the undergraduate level displayed a diverse range — again, unsurprisingly, given the diversity in institution type in North America. The most common budget categories were \$50,000 to \$100,000 and \$0 to \$50,000, each claimed by 17.31% of respondents, which may seem small, but is pretty consistent with the 2021 NAIS study of undergraduate, independent schools' marketing spend that found that just 42% of all schools have annual marketing budgets of more than \$85,000

Interestingly, 15.38% of institutions reported higher budgets of \$500,000 to \$1 million

Interestingly, 15.38% of institutions reported higher budgets of \$500,000 to \$1 million, reflecting a more aggressive approach to marketing. This same percentage, however, also indicated uncertainty about their budgets, suggesting either variable spending or a lack of a defined marketing strategy and budget for 2024.

A closer look reveals that 13.46% of respondents allocate \$100,000 to \$250,000, indicating a commitment to a solid marketing presence. Additionally, 11.54% have budgets between \$250,000 to \$500,000, showing a substantial investment in marketing initiatives.

On the higher end, 5.77% of institutions earmark a significant \$1 to 3 million for marketing, demonstrating a strong focus on comprehensive strategies. Notably, a minority of institutions (1.92% for each category) allocate between \$5 million to over \$10 million.

Undergraduate Level

"What is your approx annual budget for Admissions/ Enrollment Marketing?"

Perhaps the most interesting takeaway here is that in spite of dropping enrollment rates and the brand pressure higher ed as an industry has faced over the last couple of years, there has not been a meaningful increase in spend at institutions to change brand perception.

Annual Budget	Percent
\$100k - \$250k	34.62%
\$0 - \$50k	15.38%
Don't know	13.46%
\$250k - \$500k	9.62%
\$500k - \$1MM	9.62%
\$50k - \$100k	9.62%
\$1 - 3MM	3.85%
\$3-5MM	1.92%
\$10 MM+	1.92%

In analyzing the budget allocations for Admissions/Enrollment Marketing among traditional undergraduate institutions, there emerges a clear preference for specific spending tiers. A significant 34.62% of respondents allocate between \$100,000 to \$250,000, suggesting a strategic emphasis on this middle-range budget for effectively reaching potential students.

Interestingly, 15.38% of the institutions maintain a more conservative budget of \$0 to \$50,000, indicating a careful, perhaps more targeted approach to enrollment marketing. In contrast, a similar percentage (13.46%) of respondents are uncertain about their budget, which might point to evolving strategies or a flexible allocation depending on changing needs and opportunities.

9.62% of institutions have budgets set between \$50,000 to \$100,000

The survey also sheds light on institutions investing more heavily in marketing efforts. Both the \$250,000 to \$500,000 and the \$500,000 to \$1 million ranges are favored by 9.62% of respondents each, demonstrating a willingness to allocate significant resources for broader or more intensive marketing campaigns. Similarly, 9.62% of institutions have budgets set between \$50,000 to \$100,000, indicating a balanced investment in marketing endeavors.

Community College & Two-Year Degree Program

"What is your approx annual budget for Brand Marketing & Communications?"

Annual Budget	Percent
\$500k - \$1MM	25.00%
Don't know	25.00%
\$50k - \$100k	16.67%
\$0 - \$50k	16.67%
\$5 - 10MM	8.33%
\$100k - \$250k	8.33%

"What is your approx annual budget for Admissions/ Enrollment Marketing?"

Annual Budget	Percent
Don't know	33.33%
\$0 - \$50k	25.00%
\$50k - \$100k	16.67%
\$100k - \$250k	16.67%
\$250k - \$500k	8.33%

For Brand Marketing & Communications, the highest reported budget range was \$500,000 to \$1 million, accounting for 25% of responses — keep in mind that this percentage is based on just 15 respondents who fell into this category of institution type.

Nevertheless, this indicates a significant investment in brand presence and communication efforts by a quarter of these institutions. However, an equal proportion of respondents (25%) were unsure of their budget, suggesting either flexible budgeting practices or a lack of clarity in financial allocation for marketing.

Additionally, 16.67% of institutions each reported budgets in the more modest ranges of \$50,000 to \$100,000 and \$0 to \$50,000, indicating a cautious approach to spending in this area.

In terms of Admissions/Enrollment Marketing, the survey found a higher level of uncertainty, with 33.33% of respondents unsure of their budget. This could reflect a dynamic approach

A significant 25% of institutions have anywhere from \$0 to \$50,000, aligning with a focused, perhaps more localized recruitment strategy.

to budgeting in this sector, adapting to fluctuating enrollment trends and market conditions.

Budget ranges of \$50,000 to \$100,000 and \$100,000 to \$250,000 were each reported by 16.67% of institutions, showing a balanced investment in attracting and enrolling students. A smaller portion, 8.33%, reported spending between \$250,000 to \$500,000, indicating a more extensive marketing effort to boost enrollments.

Overall, these findings highlight a diverse range of budget allocations in marketing strategies among community colleges and two-year degree programs, with a notable mix of cautious, moderate, and aggressive spending approaches.

Marketing Strategies by Institution Type

Community College & Two-Year Degree Program

We asked respondents about what they were most concerned about with respect to marketing and recruitment in 2024, and here's what they said:

Respondents Concerns	Percent
Team that is too small	21.92%
Artificial intelligence (AI)	20.55%
Decrease in budgets	19.18%
Decrease in enrollment	17.81%
Not having good enough data analytics	10.96%
Other	6.85%
Inefficient tools e.g., lack of CRM adoption/integration	2.74%

22% noted that the most significant concern is having an undersized team

22% noted that the most significant concern is having an undersized team, indicating that many feel understaffed and possibly overburdened, which could impact their ability to meet objectives, with AI seen as the second most impactful factor. This reflects the growing influence of technology and automation in the field, with potential implications for work processes and decision-making.

Budget reductions are also a major concern, suggesting apprehension about resource constraints and their effects on operational efficiency and goal achievement, but surprisingly, only about 18% of respondents noted a significant number of respondents are worried about declining enrollment.

Not having good enough data analytics was a concern for about 11% of respondents, and lack of CRM adoption/integration was less than 3%: We believe this is indicative of the plethora of great tooling that has become available in recent years and suggests that marketers and admissions professionals aren't worried about having the right technology, but really concerned with having the right team.

Marketing Channels Impact on Driving Applicants

We asked respondents to rank the channels that are most effective in driving qualified inquiries and applicants to their schools and the programs that are least effective in driving qualified inquiries and applicants. Here's what they said:

Channels	Percent
Paid Search	16.32%
Email Marketing	16.20%
Social Media Advertising	11.90%
Content Marketing & SEO	11.29%
Other	10.67%
Direct Mail	5.28%
Facebook	4.91%
Instagram	4.66%
LinkedIn	3.07%
Don't know	2.94%
Google Display Network:	2.82%
YouTube	2.58%
Digital Out of Home	2.58%
TikTok	1.23%
Out of Home	1.23%
TV & Radio	1.23%
Snapchat	1.10%

Paid Search and Email Marketing lead as the frontrunners, each securing just over 16% of respondent confidence, underscoring their effectiveness in targeting and engaging prospective students. Their success likely stems from the ability to personalize outreach and measure responses meticulously.

Social Media Advertising and Content Marketing & SEO follow closely, indicating a robust trend towards content-driven and socially engaging strategies. These channels, with roughly 11% endorsement each, suggest that institutions are keen on leveraging organic search traffic and the pervasive reach of social platforms to attract potential applicants.

Interestingly, the 'Other' category captures a significant 10.67%, hinting at innovative or unorthodox channels gaining traction or perhaps a diversified approach that doesn't rely on conventional means alone.

Marketing Channels Impact on Driving Applicants

The moderate responses for Direct Mail and platforms like Facebook and Instagram reflect a more nuanced view, suggesting these channels may be part of a wider, integrated approach rather than standalone strategies. LinkedIn's position points towards its niche appeal, possibly more effective for graduate and professional programs.

Channels traditionally associated with broad reach but less precision such as TV&Radio, Out of Home (OOH), and newer platforms like TikTok and Snapchat trail in the rankings. This could reflect a shift towards digital provisions and away from blanket advertising.

That said, as digital-only channels become increasingly competitive and as costs to advertise on social and search continue to increase, it will be interesting to see how responses might change over the next couple of years — especially as more innovative and precise methods of OOH advertising (such as NextGrad's offering) and TikTok's advertising platform both become more mainstream.

Are there marketing channels you would like to advertise on that you've struggled getting access/approval for?

Institution Type	Percent
No (0)	55.41%
Yes (1)	44.59%

We were curious whether or not respondents felt limited in their strategies based on the platforms they were allowed to use. The majority of respondents, 55%, noted that getting access to a specific channel or platform to explore is not an issue for them.

That said, of the 44% who did note access as an issue, 30% noted TikTok as the channel they wanted to experiment with most. Graduate schools have the hardest time getting approval to experiment with new(er) channels like TikTok, with 60% of them expressing frustration in being able to experiment with less tried-and-true recruitment tactics.

Insights on International Recruitment

The Canadian Government recently capped the number of international students it will allow for the next 2 years starting in 2024 which will see a 35% decrease compared to 2023.

We wanted to get a comprehensive view of institutions' approaches to international student recruitment, target countries, and expectations for international student applicants across different educational levels.

We asked respondents to note whether they planned to change their approach to international student recruitment in 2024 as compared to 2023 and, if so, how they'd augment their strategies from the previous year.

It's worth noting that in the time since we started this project, Canada has seen a huge shift in their approach to international recruitment.

The Canadian Government recently capped the number of international students it will allow for the next 2 years starting in 2024 which will see a 35% decrease compared to 2023. Canada is experiencing a severe housing crisis which has contributed to the implementation of the cap. So, if we asked the same questions in Canada in Spring of 2024, we would likely see more extreme responses.

Traditional Undergraduate (4-Year Degree) Respondents:

Same Emphasis:

50% intend to maintain the current level of international student recruitment.

Stronger Emphasis:

30.77% plan to increase their emphasis on international student recruitment.

Less Emphasis:

19.23% are considering reducing their focus on international student recruitment.

2-Year Degree or Diploma Respondents:

Same Emphasis:

58.33% will continue with their current recruitment approach.

Stronger Emphasis:

25% aim to put more emphasis on international recruitment.

Less Emphasis:

16.67% will decrease their efforts.

Graduate School Respondents:

Same Emphasis:

48% will approach their recruitment with the same strategies and resources as they did in 2023

Stronger Emphasis:

32% are looking to increase their recruitment efforts and explore new strategies to attract more international students.

Less Emphasis:

20% plan to reduce their emphasis on international student recruitment in 2024.

Insights on International Recruitment

Target Countries for Traditional Undergraduate (4-Year Degree) Respondents:

Top targets include:

Target Countries	Percent
India	53.85%
China	16.20%
Nigeria	13.46%
Mexico	13.46%
Vietnam	11.54%
The United Kingdom	11.54%
Germany	11.54%
South Korea	9.62%
Brazil	7.69%
Bangladesh	5.77%
France	5.77%
Canada	5.77%
The Philippines	3.85%
Australia	3.85%
Saudi Arabia	3.85%
Iran	3.85%
Thailand	3.85%
Japan	3.85%

Target Countries for 2-Year Degree or Diploma Respondents:

Focus areas include:

Target Countries	Percent
United States	58.33%
Germany	25.00%
India	25.00%
Mexico	16.67%
France	16.67%
Philippines	16.67%
Vietnam	16.67%
United Kingdom	16.67%
China	16.67%

Target Countries for Graduate School Respondents:

Priorities include:

Target Countries	Percent
India	64.00%
China	40.00%
United States	28.00%
Canada	20.00%
Nigeria	20.00%
South Korea	16.00%
United Kingdom	14.00%
Germany	10.00%
Mexico	8.00%
Vietnam	6.00%
Brazil	6.00%
Bangladesh	6.00%
Iran	4.00%
France	4.00%
Thailand	4.00%
Philippines	4.00%

Expectations on Applications from International Students in 2024

Expectations for International Student Applicants:

We asked respondents to share whether or not they expected international applications in 2024 to increase, decrease, or stay the same. Here's how their responses differed by institution type:

Respondents	Stay the Same	Increase	Decrease
Traditional Undergraduate (4-Year Degree) Respondents:	36.54%	34.62%	28.85%
2-Year Degree or Diploma Respondents:	50%	41.67%	8.33%
Graduate School Respondents:	46%	28%	26%

Almost twice as many respondents from graduate institutions expect graduate applications to increase in 2024 compared to 2023! The majority of undergraduate respondents expect applications from international students to remain the same.

Confidence Level in Managing Out-of-State Recruitment and Marketing

We asked respondents to note how confident they feel in their ability to manage out-of-state advertising, marketing, and recruitment. Here's what we learned:

Yes, very confident:

Approximately **39.73%** of respondents feel very confident in tackling out-of-state advertising/recruitment.

Somewhat confident:

Around **36.99%** of respondents are somewhat confident in their ability to manage out-of-state advertising/recruitment.

No, I'm not really sure how to go about this:

About **23.29%** of respondents are not really sure how to go about out-of-state advertising/recruitment.

Only 40% of respondents feel very confident in the strategies and tactics they are using to attract out-of-state students to their schools and programs!

Confidence Level in Managing Out-of-State Recruitment and Marketing

2-year degree or diploma

Platform	Percent
Facebook	33.33%
Instagram	24.24%
LinkedIn	15.15%
YouTube	9.09%
X (Twitter)	6.06%
TikTok	11.54%
Snapchat	3.03%

Graduate Schools

Platform	Percent
Instagram	25.58%
Facebook	27.91%
LinkedIn	23.26%
YouTube	9.09%
X (Twitter)	6.98%
Snapchat	2.33%

Traditional Undergraduate (4-year degree)

Platform	Percent
Instagram	23.38%
Facebook	23.38%
YouTube	15.58%
LinkedIn	12.99%
TikTok	10.39%
Snapchat	9.09%
X (Twitter)	5.19%

Finally, it's worth noting that TikTok, which is where 20% of Gen-Z spends 5+ hours of their day, comes in 5th place as the most influential channel for new prospective student generation...

Respondents from 2-year degree programs still report Facebook to be the best-performing channel for generating new prospective students (twice as impactful as LinkedIn and three times as impactful as YouTube).

Furthermore, respondents from graduate schools report Instagram to be their top-performing lead-gen channel, out-performing both LinkedIn and Twitter, which have historically been thought to be top-performing channels for prospective graduate student capture.

With respect to undergraduate institutions, we see admissions and marketers reporting Instagram and Facebook as tied for first place as the most influential channels in new prospective student generation. Perhaps most interesting here is that YouTube is in the top 3! YouTube has not traditionally been known as a great platform for lead generation, so this trend is one that will be worth watching.

Finally, it's worth noting that TikTok, which is where 20% of Gen-Z spends 5+ hours of their day, comes in 5th place as the most influential channel for new prospective student generation, which is quite shocking given the platform's robust user base and average daily use. This 5th place ranking could be indicative of the fact that many institutions have banned the use of TikTok on campus and, as such, are unable to run marketing campaigns on the platform.

Additional Learnings and Takeaways

Our goal with this research project was to garner a better understanding of how higher ed marketers and enrollment professionals who work across myriad institution types are thinking about domestic and international marketing and recruitment in 2024 and beyond.

And while the responses varied widely, much like the institutions that make up today's higher education landscape, there were several throughlines that, as we conclude this report, are worth highlighting once more:

Strategic Staffing and AI Integration:

The concerns around team size and AI integration suggest a critical juncture where institutions must balance human creativity and the efficiency of automation. Investing in staff training for AI tools and technologies could mitigate these concerns, enhancing both productivity and strategic decision-making.

Budgeting for Impact:

The worry over decreased budgets alongside effective marketing channel preferences indicates a need for strategic financial planning. Institutions should prioritize investments in high-ROI channels like Paid Search and Email Marketing, ensuring that budget constraints do not compromise their ability to attract new students.

Navigating Enrollment Challenges:

The apprehension about declining enrollment calls for a more nuanced understanding of target demographics and their preferences. Institutions might need to diversify their marketing approaches, exploring new platforms and content strategies that resonate with younger audiences, potentially reversing enrollment declines.

Leveraging Untapped Platforms:

The interest in exploring newer platforms like TikTok, despite access challenges, highlights a gap between current marketing practices and potential areas for growth. Institutions should consider experimental campaigns on these platforms, potentially capturing untapped segments of their target audience.

Adapting to Digital Trends:

The data reflects a broader trend in higher education marketing towards digital channels, driven by their measurability, scalability, and ability to engage directly with prospective students. Institutions should continue to adapt to these trends, exploring innovative digital strategies while balancing the exploration of new platforms with proven tactics.

About the Brands Behind the Report

This survey and corresponding research report was produced in partnership between Enrollify and our friends at Glacier.

Enrollify is where higher ed marketers and enrollment professionals go to grow. Enrollify offers a plethora of free learning and development resources for industry professionals. Our podcast network is the industry's largest featuring a diverse set of the industry's leading voices as host and creators. Learn more and subscribe for free at [Enrollify.org](https://enrollify.org).

Glacier is a digital marketing agency with clients exclusively in the higher ed space across North America. With well over a decade in the industry, their team are experts in helping institutions with building your brand, increasing enrollment, and driving engagement.

They also have a high school advertising network allowing institutions to precisely advertise to students in a trusted location where education is top of mind. Their vinyl ads and digital screens are located in 1,000 high schools and growing in North America. This passionate team of marketers in Calgary, Canada loves higher ed!

Get in touch at weareglacier.org to discuss your marketing needs today.