

BUMS ON SEATS

THE DIGITAL BATTLE FOR STUDENTS

precedent.

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**IT'S A VERY POLITE
WAR, BUT THAT DOES
NOT DETRACT FROM
THE SERIOUSNESS OF
THE CONFLICT THAT IS
TAKING PLACE.**

**PAUL HOSKINS
CHAIRMAN & FOUNDER, PRECEDENT**

UNIVERSITY CHALLENGE — THE FIGHT FOR SURVIVAL

There is a war going on. You may not have noticed, as it is without any of the usual unpleasantness associated with actual fighting. It's a very polite war, but that does not detract from the seriousness of the conflict that is taking place.

Australian universities are in competition against each other. It's not that they necessarily want to see other universities crushed or defeated; it's about the want and need to survive. Consequently, universities are fighting hard for students, research funds, and business partnerships that will bring that all-important income.

As a leading digital agency in the higher education digital market, working with over forty Higher Education Institutions (HEIs) in Asia Pacific and the UK, we are aware of the digital aspirations and questions posed by universities. We see the different battlegrounds on which they are choosing to fight; we see the different strategies universities are using to dominate their corner of the market; and we see the many tactics that universities are employing to bolster their position and respond quickly to unexpected changes.

This report, 'Bums on Seats – the digital battle for students', builds on our experience of helping universities to win their battles. It also builds on our experience guiding universities down the road to digital transformation and starting to implement the ideas we developed for a digital campus in our 2013 higher education whitepaper, 'The Digital Campus – the online future for higher education.' We offer this overview of the unfolding conflict so that you can appreciate the multiple fronts on which it is being fought as universities work hard to survive and grow.



Paul Hoskins
Chairman & Founder,
Precedent

A handwritten signature in black ink, appearing to read 'PH.' followed by a flourish.



THE ENEMY

UNIVERSITIES ARE BATTLING ON MULTIPLE FRONTS

BATTLING AGAINST EACH OTHER

for home students and reputation

BATTLING AGAINST OVERSEAS UNIVERSITIES

for high-value international students

BATTLING TO SHOW THE VALUE OF A DEGREE

in the face of:

INCREASING COSTS

The average increase in fees could rise as much as 29% in the next two years

BUSINESS INSIDER AUSTRALIA, 2014

DECLINING JOBS

For the first time in a quarter of a century, less than 70% of graduates are working full time

GRADUATE CAREERS AUSTRALIA, 2014

DECLINING EARNINGS

With the number of graduates with study debts above \$40,000 doubling in the past two years

ATO, 2015

BATTLING IN THE VARIOUS RANKING SYSTEMS

with their often murky methodologies

BATTLING AGAINST NEW MARKET ENTRANTS

offering skills-based and personal development courses

BATTLING TOP UNIVERSITIES

to stop them capturing the best students

BATTLING NEW VOCATIONAL ALTERNATIVES

attracting people with more job-relevant education

THIS IS MAKING IT HARD FOR EVERYONE

TOP-RANKING UNIVERSITIES

with global reputations are battling against global competitors

BOTTOM-RANKING UNIVERSITIES

are fighting hard to survive by creating successful niches

MIDDLE-RANKING UNIVERSITIES

are battling top universities for top students, bottom universities for niche subjects, and the wide choice of other middle universities

THE FOUR

BATTLE- GROUNDS



UNIVERSITIES DO NOT HAVE A LOT OF ROOM TO MANOEUVRE

They cannot compete on prices, which are controlled by the Government. They struggle to compete on product because, notionally, a degree is equivalent to any other degree. They can, however, compete on reputation, but reputations are slow to change.

While some universities have managed to carve a reputation as ‘the place’ to study a particular specialist course, in general, differences in course structure and design are difficult to appreciate, especially for prospective students overloaded with information.

The battle can be fought in a number of places, for example, at open days and with print materials, but first and foremost, the battleground is digital. It is here that universities can compete on experience: brand, customer and user.

- How impressive is the brand experience – does the university look impressive, successful, and vibrant?
- How smooth is the customer experience – is it easy to get things done?
- How engaging is the user experience – does the university reach out to you, listen as well as inform, look after you as well as teach you, and present a place ‘people like you’ can fit in?

HERE WE DETAIL THE FOUR MOST COMPETITIVE BATTLEGROUND ON WHICH UNIVERSITIES ARE BATTLING.

1. THE PUBLIC WEBSITE

For the last few years, the focus has been on the external website, rather than on the web presence as a whole. The primary investment has been in student recruitment: selling the university. As a consequence, many university websites have become bolder, simpler, much more striking, more persuasive, better written and more focused on income generation.

THIS BATTLE IS STILL FEROCIOUS:

- Universities who were outmanoeuvred are racing to catch up.
- Universities who put a temporary fix in place are working hard to take the changes further.
- Universities with strongly decentralised cultures are still struggling to make the case for a unified experience.
- Universities that implemented sophisticated marketing-focused content management systems are learning to use their new powers.
- Universities with ambition have started on a path to digital transformation, from just having a website, to being a digital organisation.

2. DIGITAL MARKETING

Digital campaigns were popular a few years ago, principally aimed at supporting overseas recruitment and exploiting the new opportunities of the social web. This has now taken a backseat as primary investments have focused on either fixing the current external website, or designing and developing a new one. Once progress has been made in these areas, we would expect to see a return to a more active campaign battleground, but one that is better integrated into a university's wider web presence. It will involve exploiting the new generation of marketing-focused content management systems.

3. THE CAMPUS EXPERIENCE

The internal digital experience is a new battleground; what is it like to learn, teach, research, and live at the university?

THIS HAS SEVERAL DRIVERS:

- The need to reduce student attrition rates.
- The need to improve factors that affect university rankings such as student satisfaction, course quality, assessment and feedback, and employability.
- The growing realisation that universities' internal digital experiences are disappointing digital native students who expect much better.
- The desire to realise more fully the investment in virtual learning and research environments.

4. THE ONLINE-FIRST UNIVERSITY

One area that has not yet been exploited is what could be termed 'online first'. Implicitly, all current university efforts have been 'campus first' – investing far more in buildings and facilities than in their online presence. Universities still see themselves as very location-specific, in accordance with their names.

Yet there is an opportunity to become a digital university first and foremost. Education and research can both be delivered digitally without the loss of personal interaction. This is a goal for the future, and will be challenging to achieve, involving new working practices across all areas. However, in ten to twenty years' time, digital advances will certainly have made this possible, and thinking about it needs to start now.



THE SIX STRATEGIES



Where to fight your battle is a decision that needs to go together with how to fight and the strategies to use. We outline six strategies that are being actively pursued.

1. CUSTOMER EXPERIENCE LED

We are seeing an emerging cultural shift, centring thinking on customers: their needs, wants, and fears, and developing experiences that satisfy those. In the business world, customer experience is vital for sales and profit.

In our 2014 report entitled ‘Driving Actions and Reactions – engaging your customers in the new digital world’, we looked at the impact of this. What universities ‘sell’ is a student experience from enrolment to graduation, and a better life afterwards.

Managing and maintaining your customer experience across a set of linked phases will ultimately benefit the institution through growth, retention and loyalty. This can be difficult when phases are managed by distinctly separate university departments. Universities need to start thinking in a less siloed way, and think more about the channels they use to create the customer experience. Our Digital Campus report demonstrates how this can be done.

CUSTOMER EXPERIENCE PHASES:



CUSTOMER EXPERIENCE PHASES



THE APPLICATION EXPERIENCE

This affects recruitment and sets the context for later experiences. Students infer how responsive, friendly and helpful a university is from their experience during this process. There is a need to present a compelling offer online and respond rapidly.



THE ACADEMIC EXPERIENCE

Increased fees are changing student attitudes: 'We're paying \$10K, why aren't we getting -?' Small percentage differences can have a disproportionate effect, so improving results is critical.



THE CAMPUS EXPERIENCE

The student experience is a life-changing one. What is life like beyond the classroom? The campus, the student community, and social life need to foster a sense of belonging.



THE GRADUATE EXPERIENCE

Demonstrating employability is essential. Retaining loyalty by creating a successful network of alumni will contribute in turn to recruitment through a growing reputation, returning students for postgraduate study, and greater links to businesses.

CUSTOMER EXPERIENCE CHANNELS



WEBSITE AS A FULFILMENT CHANNEL



WEBSITE AS A MARKETING CHANNEL



SOCIAL AS AN ENGAGEMENT CHANNEL



SOCIAL AS A MARKET INSIGHT CHANNEL



EMAIL AS AN INSTRUCTION CHANNEL



HUMAN CONTACT AS A PROBLEM-SOLVING CHANNEL



CALENDAR AS A TIME-STRUCTURING CHANNEL



VIRTUAL LEARNING ENVIRONMENT
AS A CONNECTED-LEARNING CHANNEL

2. MARKETING LED

Higher education is not just about young people leaving secondary school. The value of international students has long been appreciated, but they will become harder to attract, so the value of non-traditional students is increasing. Universities need to target mature students, students coming through open access routes, part-time students, professional development students, and personal interest students.

For example, around 60% of students are aged between 15 – 24 years, which means a huge 40% of students are aged between 25 – 64 years (ABC, 2013). Yet marketing efforts for these students, who often study part time, or, for personal interest or professional development reasons, feel half-hearted and treated as having low importance.

To attract and retain these valuable non-traditional learners, it is important to realise the unique needs of individual audiences and adapt the way you sell yourself as an institution. Only then can each market be separately addressed.



University of the
West of England



To attract a range of international audiences, we partnered with the University of the West of England to create an online international prospectus. The responsive, stand-alone website built in Umbraco utilises rich media and interactive features and positions the institution as a truly global HEI. Unlike the original print version, the online prospectus is a cost-effective marketing tool that prioritises a high-value audience segment.

3. LIFELONG LEARNING; LIFELONG CONNECTION LED

Marketing is expensive. Having won students, it would be best for the university to keep them, encouraging them to continue to higher degrees, offering continuing professional development in their fields, and engaging them as alumni.

Many universities operate a small alumni department, disconnected from the rest of the university. This model has failed to reap the full benefits of successful graduates. Universities need to expand their thinking about a lifelong partnership with students. This relationship needs to be established before graduation, building on the student experience. Stronger alumni relations will offer testimonials, encourage alumni to return as students for professional development, increase donations, and provide greater potential for business and employer links.

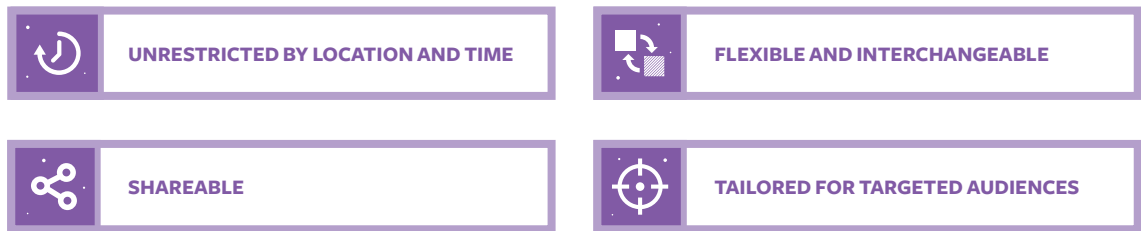
UNIVERSITY OF BIRMINGHAM



‘Circles of Influence’, the University of Birmingham’s philanthropic fundraising campaign, had two key objectives: to fund key projects across the university, and to instill a culture of philanthropy within the University and its donor communities. We worked with Birmingham to develop the visual identity of the campaign, which included a major gift campaign brochure, direct mail and events graphics. Within the first year of launching, the campaign raised almost £60 million.

4. PEDAGOGICAL INNOVATION LED

The face-to-face, ‘teach, cram, exam’ model is a thousand years old. Continual increases in the cost of going to university are unsustainable. New types of digitally-enabled teaching and learning will enable a new model for university course materials:



Universities have been investing in Virtual Learning Environments (VLEs) for a while, but they have often not properly supported the implementation. So, VLEs often become repositories that support traditional teaching. This is starting to change. Learning is becoming more collaborative and interactive, blending teacher and student-generated content.

5. EMPLOYMENT LED

A recent research study by the *Guardian* found that 71% of students undertook postgraduate study to enhance their job prospects. Students are more likely to be drawn to courses that explicitly prepare them for work. Many universities have created more employment-focused courses taught, at least in part, by ex-practitioners and designed in partnership with major businesses.

Coventry University, in the UK, seeks to include employment-related activity that reflects real-world experience in each of its courses, such as a working factory floor for engineering students and a professional theatre company involved in the university’s Collaborative Theatre Making MA. The result is a greater focus on students gaining employment-related capabilities and an understanding of the workplace.

6. DIGITAL TRANSFORMATION: THE TOTAL UNIVERSITY EXPERIENCE

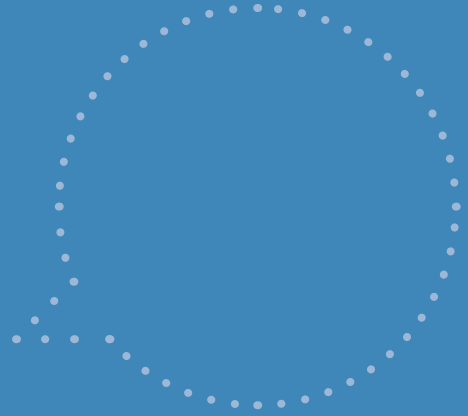
This is the big, ambitious strategy. It means moving the university from having a web presence to being truly digital. Digital transformation goes much further than customer experience. It is a matter for the entire institution, requiring a holistic approach and cultural change.

It is about creating a unified digital culture of shared values, speaking the same language across the university. You cannot consider social media, intranets, VLEs, the website, email or apps in isolation. It requires significant effort to reimagine what a university is, based on the new possibilities digital technology offers. Thinking ‘digital by default’ becomes a habit, shifting to digital as the prime way for the university to interact.

This is a long journey, requiring very significant resources and senior management support. Despite the size of the task, several universities are taking their first significant steps along this course.

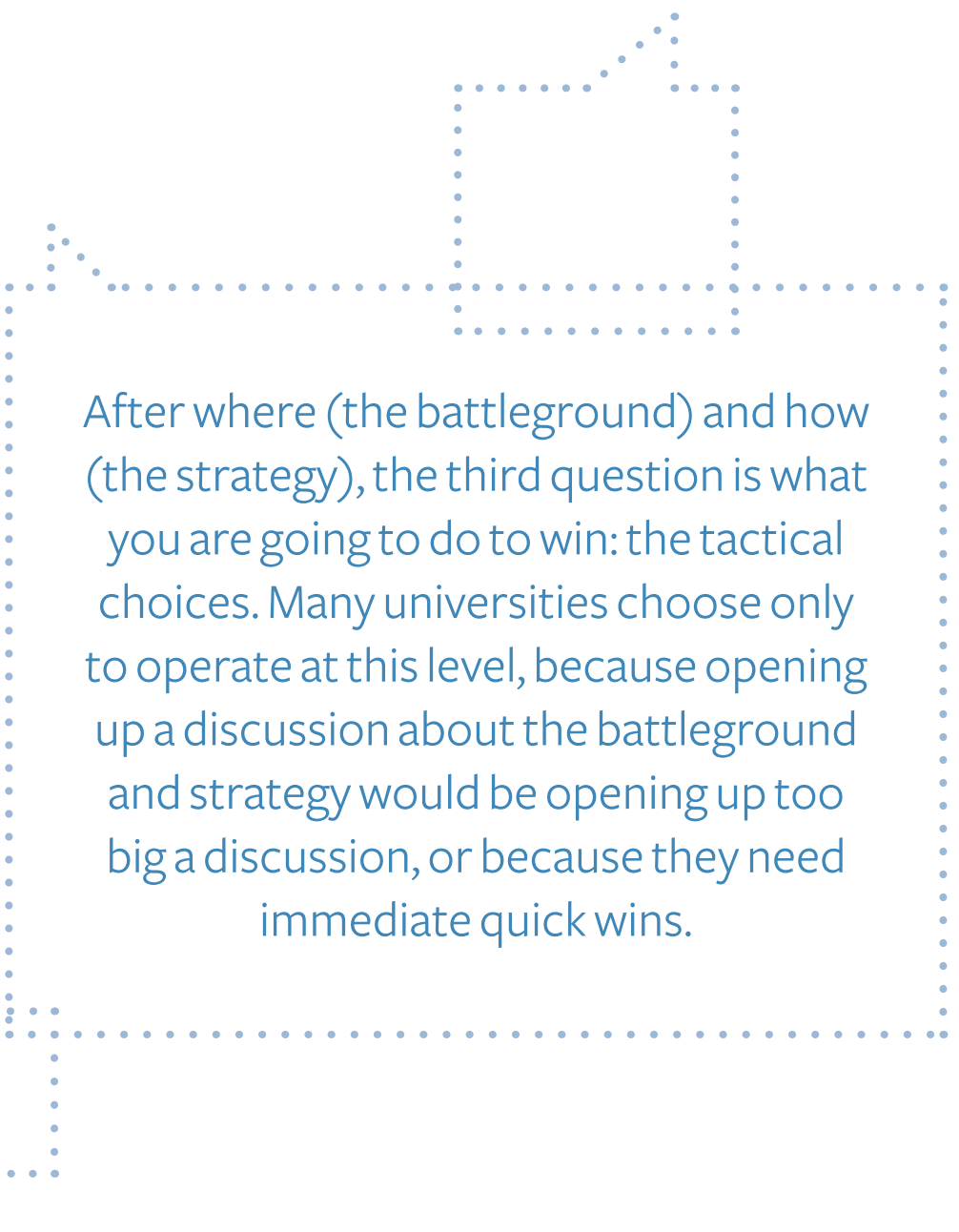


We are working with our alliance partners KPMG to enable the University of Aberdeen to become a truly digital HEI; to comprehensively explore the University’s challenges from both organisational and audience perspectives. We are taking into account their ideal future customer experience, and their operating realities to create a roadmap for digital transformation which is backed up by achievable organisational change. This will enable the University to stay ahead of their competitors, and face the threats presented by digital head on.



THE TEN TACTICS





After where (the battleground) and how (the strategy), the third question is what you are going to do to win: the tactical choices. Many universities choose only to operate at this level, because opening up a discussion about the battleground and strategy would be opening up too big a discussion, or because they need immediate quick wins.

1. DEFRAGMENTING THE USER JOURNEY

USER JOURNEY MAPPING AND ANALYSIS

A lot of universities are doing this vital, corrective work. The journey, from entering the site to completing the user's desired task, is key to a website's success. If pages are uploaded to the site in a chaotic manner, without coordination and authored by different teams, then the path will be hard to follow, leaving visitors frustrated and damaging the reputation of the university.

2. RADICAL SIMPLIFICATION: DOING LESS, BETTER

CONTENT AUDITS AND GOVERNANCE REDESIGN

University websites are usually big – very big, tens of thousands of pages big, sometimes hundreds of thousands. The outgrowth of decentralised content governance models usually has few controls and no active management of published content. As a result, new content is continually added but little, if any, is ever removed.

A number of universities are taking the bold step to radically simplify their content. Better governance models are being developed. Better management information from web analytics is being used. Content audits are being undertaken to hack away at the content bloat. The aim is to radically simplify the size and structure of the web presence.



We worked with Murdoch University to deliver a content audit, gap analysis and content delivery plan, providing clear guidelines for what content should be deleted, updated or newly written. Following this, we created two new information architectures (IA), which were tested with real audience members to arrive at a final, more intuitive and usable IA.

3. CONTENT PROFESSIONALISATION: THE TWILIGHT OF AMATEURISM

DIGITAL SKILLS AUDIT AND TEAM RESTRUCTURING

Digital skills are slowly increasing throughout higher education: copywriters, visual designers, video makers, editors, community managers, and analytics analysts, are all being employed to create improved content. Such content seeks to sell the university, usually by telling compelling stories rather than merely presenting information.

Skills audits and team restructurings, which often involve changes to governance, can be painful. The role of the web author, usually a subject matter expert in a department, is dwindling to become the provider of drafts. The endless battle between centralisation and decentralisation, common across a range of issues at universities, also gets played out here. However, the need for a web presence that is produced more professionally, with high production values, is currently driving centralisation.

4. NARROWCASTING THE MESSAGE

PERSONALISATION AND PERSONAS

Universities are increasingly seeing the limits of broadcast communications: one size does not fit all. With a wide variety of audiences, often differentiated by geography, age, sector, and need (study, research or business), broadcasting the same content to everyone involves presenting large amounts of irrelevant content. Using geolocation and personalisation technologies, a far more tailored, narrowcast communication is possible. This makes the use of personas – so powerful in the design field – even more important as you start to think about the levels of audience segmentation you want to apply.

5. COMMUNICATING THE FEEL OF THE UNIVERSITY

EXPERIENCE DESIGN AND CAMPAIGN DESIGN

Often, the intangible differentiator that tips the balance in favour of one university over another is the feel of the place, or its atmosphere.

Trying to convey this digitally is challenging. Many universities have built up expansive student life sections. The most successful ones focus on telling stories, rather than explaining all the facilities. This is about crafting a distinctive experience with an eye-catching campaign, probably supported with advertising and needing to demonstrate a clear return on investment.

With a regulated and constrained domestic market, it is natural that universities have sought to expand into new markets, with new campuses and international students. The competition has been intense, and we expect campaigning activity to continue growing as universities' selective targeting becomes more accurate.



The University of Western Australia's 2015 open day needed an impressive digital presence to inspire and guide future students through the world of higher education. A cross-discipline project team, including UWA staff, was set up in order to achieve this objective, with the initial focus on sketch wire-framing and guerrilla user-testing, targeting school leavers. This informed the initial thinking, user journeys, and pain points and opportunities to realise a user focused experience for the audience. Designs were then crafted based on these learnings, ensuring the University's open day 'image' would resonate with future students. The outcome is a leading example of user experience, interactive design and immersive learning through experience and teamwork, while delivering on the business objectives.

6. STRENGTHENING WEAK LINKS

ENGAGEMENT AND SOCIAL MEDIA

The Internet is great at keeping track of weak personal links like ex-colleagues, friends of friends, and distant relatives. The sort of people you might not see for years, or even ever again, are brought to greater prominence by web connections. Reminders, endorsements, anniversaries, ‘do you know’ questions, comments, and invitations to events all help to keep you more attached.

This is allowing universities to reach out to prospective students, current students, alumni, and particular target groups through campaigns. It is an area that has been less lively in the last year, as work has focused on fixing the user journey, but we expect to see a lot more campaigning activity in relation to engagement and social media.

7. IMPROVING THE STUDENT EXPERIENCE

COMMUNICATION CHANNEL ANALYSIS

Being ‘at university’ is no longer solely a physical experience. Physical and digital are ever more intertwined, as captured in the ugly neologism ‘phygital’. One of the results is that students face an increased volume of digital communication: from academics, from peers, and from the university administration.

Students have to navigate a variety of systems, portals, VLEs, social channels and email inboxes filled to overflowing. Naturally, students manage this inundation through selective ignoring and mass deleting, which defeats the object of trying to communicate with them in these ways. You can enhance the student experience by making digital communication more efficient and effective.

ROYAL CENTRAL
SCHOOL OF SPEECH & DRAMA
UNIVERSITY OF LONDON

The Royal Central School of Speech and Drama have introduced online student profiles, similar to an online CV for agents, allowing students to create and manage their own profile. Students can upload rich media to set them up for a successful career post-university.

8. DEVELOPING DIGITAL LITERACY

TRAINING AND CULTURE CHANGE SUPPORT

The hardest part of digital change is not implementing new technology, nor designing new sites. The hardest part is changing the culture and mindset of the university. From using new technology to support old ways of working, to thinking about ‘my department’s web pages’ and not the user’s needs, it is easy for digital investments to be invalidated.

You can help with skills development and culture change by evolving how staff think about the digital experience, supporting change programmes, working to overcome self-limiting beliefs (for example, ‘I’m not good with technology’), and demonstrating how digital can transform lives and learning.

9. BETTER PERSUASION

USABILITY TESTING AND PERSUASION AUDITS

At its core, the web presence is about trying to change people’s behaviour. This can be done in two ways. You can make things a lot simpler. The more simple something is to do, the less likely people are to balk at doing it. Undertaking usability testing to identify sticking points and create appropriate fixes is a key tactic.

You can also change people’s behaviour by changing their minds. This is not brainwashing, but finding those who might be inclined towards you and ‘nudging’ them to cross the threshold and make a commitment. Undertaking a persuasion audit, and understanding how to use the psychological techniques commonly seen on commercial sites, is essential.

10. REPUTATION SHOWCASING

BRAND AUDITS, COMPETITOR ANALYSIS, CONTENT STRATEGY AND ART DIRECTION

We're Aussies. We don't like to brag. But in a world where everyone has a degree, reputation is the chief differentiator. Most universities have recognised that they need to bang their own drum – maybe even get a bigger drum. Reputation is a key asset in attracting income.

This needs careful attention. Brand audits and competitor analyses are essential to understanding how well you are projecting yourself and how well your competitors are doing. Art direction, to give your web presence professional, visual coherence is vital for making a good impression. Content strategies, to control what you convey and through which channels, are important for telling a coherent story.

These soft skills build the reputations of the university, your academics, and even your students.



Taking a radical departure from their existing branding, we worked with Leeds College of Music to position them as a hub of creativity, building on their core brand values of innovation, passion and collaboration. The brand concept we created was themed around the power of the individual to create new and exciting forms of music, posing the question, 'What does your sound look like?' By playing their music through specially created software, students would be able to create their own intricate and unique generative logo.

WINNING YOUR NEXT BATTLE



A FINAL THOUGHT

The war is on. Some universities might fail. Investment in digital is essential in the fight to secure financial sustainability. External websites are under pressure to improve: new ones are being designed and built, while old ones are being upgraded, ready for next year's campaign. New battlefields are starting to open up, with an increasing emphasis on living and learning at university. Attention is starting to shift from short-term recruitment to the bigger conflict, the battle for reputation, which is the ultimate lifeblood of universities.

On all these battlefields, whatever the strategies or tactics you choose, the outcome of the digital revolution will be the same. It will enable people to make personal connections with the universities they will study with, work with, partner with, and stay in contact with for the rest of their lives. If a competitor university is better at making those personal connections than you are, you could be in trouble.

ABOUT PRECEDENT

Precedent is a full-service digital agency with over 26 years of experience. We don't just implement digital projects – we become our clients' digital partners and we are proud to say that many of our clients have been with us for nearly a decade.

Our team spans across six offices in Asia Pacific and the UK, representing the best in digital talent. We work with leading organisations to locate the customer experience pain points and implement digital solutions that are guaranteed to improve efficiency, engagement and the all-important experience.

We fuse creativity, technology and business strategy from the outset and have a team of digital experts all motivated by the same common goal – helping our clients become more successful.

SERVICES

- CUSTOMER AND USER EXPERIENCE DESIGN
- WEB AND MOBILE DESIGN AND DEVELOPMENT
- CONTENT MANAGEMENT
- DIGITAL STRATEGY
- HOSTING AND SUPPORT
- DIGITAL TRANSFORMATION
- DIGITAL WORKSHOPS AND STRATEGY DAYS

SECTORS

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- MEMBERSHIP
- CHARITY
- HEALTH AND CARE
- FINANCE
- GOVERNMENT
- PROFESSIONAL SERVICES
- TRAVEL AND LEISURE

OUR SEMINARS AND REPORTS:

We have been researching and writing industry reports such as this for many years. We also run regular free seminars and webinars across Asia Pacific and the UK that delve deeper into the report findings. We will be holding a number of seminars over the coming year, and will also be launching a number of new reports that are designed to keep our clients up to date with the latest thinking and trends in digital. Visit www.precedent.com/our-thinking

SOME OF OUR HIGHER EDUCATION CLIENTS

ROYAL CENTRAL
SCHOOL OF SPEECH & DRAMA
UNIVERSITY OF LONDON



To view our full client list, visit www.precedent.com/clients

GET IN TOUCH

If you would like to talk to us about any aspect of your digital needs, we would be delighted to help.



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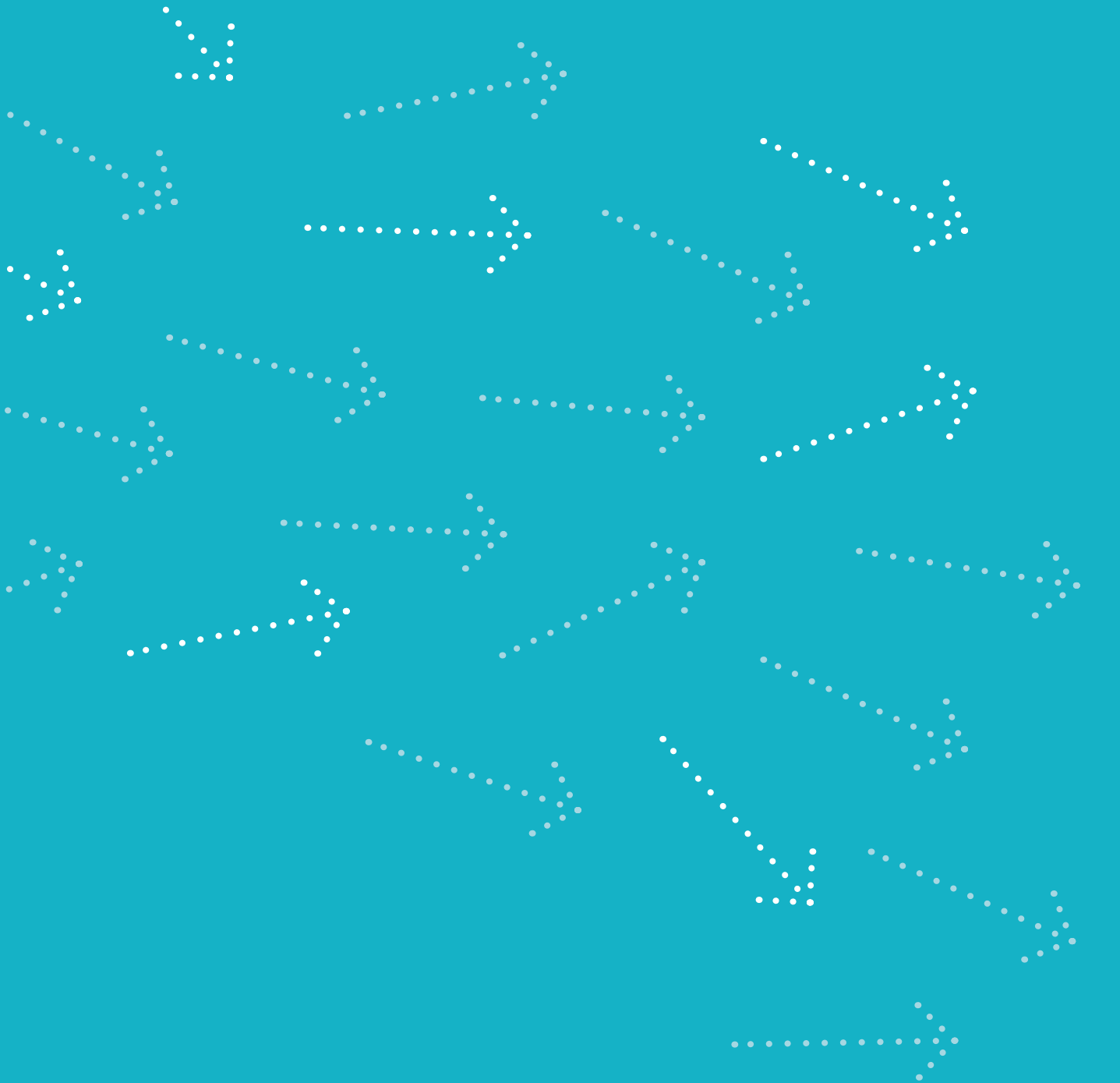
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