



Playbook: Exploring Multi-Year Trends in Higher Ed Conversation



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Introduction

We’ve been analyzing conversation about the higher ed industry for the last three years. Why? [It’s what we do!](#) And we do it because higher ed is our home. Most of our employees got their start in higher ed, and it’s the industry we focus on because we believe in it—like you.

It’s also why we created an entire service to share the insights we bubble up on a regular basis, across core areas on campus. To help pros like you understand how higher ed conversation is changing **and** what to do with the industry trends we find.

This playbook dives into the last three years of data, exploring the multi-year trends we’ve captured using social listening. When analyzing a time frame that includes a challenge like the pandemic, it’s easy to get caught looking through a singular lens and at short-term side effects. So let’s zoom out and look at it in context of larger trends regarding online conversation in higher ed. And specifically review the ways the conversation changed—or didn’t change—and what it means for the short term.



Conversation Volume

Conversation volume indicates how many people are talking about campuses and how much they're talking about them.

Conversation Fell

Conversation was falling before March 2020, but during the pandemic it plummeted. There was a 41% decrease in overall conversation from our sample in July–December 2020 compared to the same period in 2018.

This might surprise you because the intensity of the conversations you faced in 2020 probably made it feel like there was more conversation than ever before.



TREND Social Media Managers Need Support

When West Virginia University (WVU) surveyed other higher ed social media managers in the summer of 2020, they rated their mental health at 4.63 on a scale of 1–10, with 1 being the lowest score. The score was the result of an onslaught of negative comments, a lack of support from supervisors, and generally feeling overwhelmed from the workload.

[In a special event webinar with us](#), WVU shared the results of their 2020 and 2021 surveys, exploring the crucial role social media managers played during the pandemic and how to take care of these experts on campus.



Add in Athletics Conversation

For campuses with athletic programs, the drop in conversation was even steeper—65% between fall 2018 and fall 2020.

We know that athletics drives conversation for campuses and 2020 saw games postponed or canceled and limited recruiting visits—all contributing to a drop in conversation volume.

Athletics, regardless of your division, contributes to everything from recruitment to philanthropy to community relations. All the while impacting perceptions of your brand. Without it, you lose critical awareness with those key audiences. Making your class and raising money without that awareness, while trying to balance the budget, is a difficult path to go down.



In 2019—the year before the pandemic, [Gallup said](#) the public perception of higher education declined more than any other industry they track. It certainly hasn't rebounded since.

But incredible things happen on every single campus all the time. Telling these stories helps build relationships and rebuild trust. Andy Fuller, Notre Dame, [recently wrote](#) “people will read or watch or listen to what interests them, and sometimes it originates with a university.... We need to do more to influence public opinion, and authentic storytelling can be an effective tool in that work.”

Campuses who tell brand-aligned stories will recover mindshare and visibility in online conversation and push back on the declining trust in higher ed. There are a few things you can do to begin recovering trust.

Outside of athletics, ensure the non-athletics portion of your conversation is brand-aligned.

Including athletics, create a better working relationship with your athletics directors, coaches, and student-athletes to ensure they're quality stewards of the brand. Work alongside athletics to ensure a larger share of your collective voice is brand-aligned.

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Questions to Consider

- Did your conversation experience a drop in overall volume similar to the industry as a whole? If so, are you able to determine what aspects of your conversation dipped in fall 2020? Is that a seasonal or temporary conversation type, or does the drop have longer-term consequences?
- When looking at your campus conversation volume and trends, do any patterns emerge? Are there campus events or other institutional activities that influence these trends (e.g., athletics)? How can you use your unique characteristics as a differentiator?
- Have you observed seasonal drivers of volume changes? Are you planning content intentionally for higher- and lower-volume times of year?

Sentiment

Sentiment is a barometer of how a community talks about your campus
—positive, negative, or neutral.

Sentiment Shifted

When comparing the 2018–2019 academic year to the most recent fall and spring semesters, the portion of the conversation that was neutral, positive, and negative stayed roughly the same. But during the pandemic, sentiment shifted.

Negative conversation doubled to 8%, while positive conversation dropped by two thirds to 8%. Neutral increased.

	2018-2019	Pandemic	Fall 2020	Spring 2021
Neutral	Median: 69% Typical Range: 63% - 74%	Higher Ed: 83% 1st Person: 41%	Median: 68% Typical Range: 63% - 75%	Median: 73% Typical Range: 68% - 83%
Positive	Median: 24% Typical Range: 18%-31%	Higher Ed: 8% 1st Person: 19%	Median: 24% Typical Range: 17%-31%	Median: 21% Typical Range: 15%-27%
Negative	Median: 4% Typical Range: 3%-9%	Higher Ed: 8% 1st Person: 40%	Median: 5% Typical Range: 2%-8%	Median: 3% Typical Range: 2%-6%



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Events Impacting Individuals Drive Positive and Negative Sentiment

Looking at the conversation coming directly from first-person audiences (students, prospective students, their families, and alumni), the shifts in sentiment are more pronounced. In those conversations, neutral and negative conversation was roughly equal at 40–41%, with the remaining conversation (19%) positive. This segmentation shows that individuals directly affected by the pandemic were more likely to have emotionally charged conversations online, whether positive or negative.

Messages with strong positive or negative feelings about your campus are most likely to be remembered by the people who see them.

You can impact your brand perception by identifying and capitalizing on these events and issues to increase positive mentions and minimize negative ones.

Sentiment Nuances

There are common drivers of what changes sentiment: admit decisions and graduation are positive and issues like massive course changes (such as the shift to online learning during the pandemic) are negative. But there are controllable factors, and whether they went well during the pandemic or not, you can address them now as the roughest times are starting to recede.

Controllable Factors:

- Tuition and finances
- Classes
- Technology
- Accessibility

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- When you observed COVID-19 related negative sentiment in your campus’s conversation, was it about the pandemic itself or the effect of closures and remote learning? Or did you find it directed toward your institution?
- If your campus experienced a higher percentage of negative sentiment, have you considered the mental health effects that come with managing social channels during this time? Has your team put into place resources and processes to give social media managers time away from managing your community?
- If your campus has an athletics program, how does it influence sentiment in your conversation? Does it influence only athletics-related content, or does it influence the sentiment within your broader conversation?

Owned vs. Earned

Owned vs. earned conversation is the portion of the online conversation generated by campus-affiliated accounts compared to others

- **Owned conversation** is generated by accounts affiliated with a campus such as the campus’s official social media account, athletics program, or educational department page. Retweets of owned accounts are measured as owned conversation.
- **Earned conversation** is generated by those without a direct relationship to the campus, such as student-run clubs and organizations (e.g., Greek life), or others creating content about your campus.

Most Conversation Is Earned

Since we started our research, we’ve seen that most conversation about campuses is earned, which aligns with the idea that your brand isn’t what you say it is, it’s what they (your audience) says it is.

A few years ago, about two thirds of conversation about campuses was earned. Values always vary within a range, but posts from non-campus accounts were generally always more than half of a campus’s conversation.



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Owned Conversation Is Falling Even More

A year ago, we saw a fluctuation in the data. We couldn't call it a trend because it was just one semester, but owned conversation decreased as a proportion of conversations about campuses.

Adding fresh data from last semester, the trend is becoming more clear. As a portion of total conversation about campuses, owned conversation is now just 25%. For every piece of content published by anyone on campus with a branded account, three additional pieces you have no control over are published elsewhere.

It's unclear if this dip is due to an intentional decline in content production, staffing challenges, or a change in the amount of content non-campus entities are producing; we're still analyzing that data. But there are opportunities.

Opportunities for Small Campuses

Looking at the differences in owned and earned conversation for small campuses (fewer than 10,000 students), we found that smaller campuses post much more original content (as compared to replies or shares) than large campuses, and they're not seeing any benefit in terms of larger earned conversation. That means there's little social listening evidence that campuses with less than 10,000 drive greater awareness by posting more original content, which leads to two recommendations.

- **Pull back on your content calendar.** Don't worry about posting original content as often, or from as many accounts.
- **Focus on engagement.** Not the engagement rate of your posts, but the individual moments when you engage with your community. At a minimum, reply to people who mention any of the accounts associated with your campus. Once you've set that standard, proactively engage with people who talk about you, but not to you—the posts you'll find only through social listening.

Opportunities for Large Campuses

Two things stand out for large campuses (those with 10,000 or more full-time enrolled students).

- **Consistency.** Top-line social listening metrics like conversation volume, unique authors, and sentiment are fairly similar across large campuses, especially on a semester or annual basis. Vanity metrics won't communicate your effectiveness as a marketer or place within your competitive set or our industry. You need to consider the totality of online conversation about your campus.
- **Cross-campus buy-in is critical.** Your flagship social accounts contribute to as little as 1% of online conversation about your campus. If your message isn't adopted across campus—by your school of public health, your student affairs division, and yes, even your athletic teams—your effort is pointless.

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- Looking specifically at owned conversation, did your campus publish less frequently in fall 2020 than in previous years? If so, how did that impact related metrics like engagement rate, follower growth, the percentage of your owned posts that were replies vs. original content, or the top topics or hashtags within your conversation?
- How does your campus’s owned and earned conversation compare to industry benchmarks? Are there content types that generally draw a greater response?
- Have you defined KPIs for your online strategy? Is your goal to reach a wider audience, to increase engagement with your current audience, or something else? What KPIs can you use to measure progress toward these goals?

Social Listening at Work

There was a lot that was unknown during the past three years, but there were some bright spots. Some campuses were able to use the situation to listen to their audience and engage, with positive results.

DIY Purdue Campus Tour

Prospective student Hailey was scheduled to tour Purdue University, but campus visits were put on hold during the pandemic. Instead, her family created a [surprise DIY campus tour](#) at home. Hailey posted it to Twitter and her post went somewhat viral.

- [Purdue](#) caught the post even though they weren't tagged or mentioned—they apologized for the cancelation and linked Hailey to their virtual tour.
- [The school of nursing](#), where Hailey was applying, responded and so did the [dean of the nursing school](#).



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Then the snowball really started rolling. Alumni chimed in, parents of students responded. They all told Hailey she didn’t need a tour to know this was the best decision she could make. Administrators who didn’t even work at Purdue anymore offered guided tours. People shared photos of game days and other student experiences.

It was a feel good moment, where the Purdue community came together with a sense of belonging and authenticity that no marketing campaign could ever even think of reaching. And it all started because Purdue was listening.

Smith College and Taylor Swift

Like Purdue, some celebrities were also listening. Students took to Twitter, Tumblr, and other social networks to share their pandemic challenges and appeal to online influencers, celebrities, and even the general public to send cash when their income and housing sources ran out. And Taylor Swift was listening; she understands her fans use social media to develop an affinity for each other and deepen their relationship with her.

Jess, a Swiftie since age 7, made a [plea on Tumblr](#) when she was a sophomore at Smith College in March 2020. [Taylor responded](#) with an unexpected gift of \$3,000.



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Key Takeaways

- Online conversation about higher education dramatically decreased in fall 2020, most notably for campuses with athletics programs. This decreases visibility. Conversation levels are rebounding but they aren't yet back, so now is the time to invest in increasing your visibility.
- Small Campuses: You can't win the content creation arms race. Increase your visibility where it matters most—with individual engagement.
- Large Campuses: At a macro level, you're incredibly similar to your peers. Measure what matters to your campus. The quantity of conversation is the same; but is the quality of that conversation what you want it to be? That's where you can differentiate your campus.
- Knowing industry benchmarks and trends in conversation about higher ed can help you quickly adapt your campus strategy, or find support for your planned work.

