Higher Education Marketing Investment Continues to Rise Amidst Digital-First Imperatives

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kiosk

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Executive Summary

The marketing landscape for higher education is currently navigating a period of profound transformation, characterized by a notable increase in media spending despite significant external pressures. This report provides a comprehensive analysis of the spending trends, competitive dynamics, and strategic shifts within the higher education marketing category from 2023 through the first half of 2025.

Our research suggests that the steady increase in advertising investment is a reflection of a relatively mature market grappling with a challenging recruitment and regulatory environment along with a shift in the marketing landscape itself.

To provide greater return on investment (ROI) or return on advertising spend (ROAS), it is necessary to pivot to a digital-first, data-driven investment strategy, while not losing human connections that break through the cluttered media environment.

Key findings from this analysis show that overall category spending has been on a steady incline for the past two years, with a continued acceleration in the first half of 2025[1]. The market is dominated by a small number of institutions, primarily large online and for-profit universities, which collectively command a disproportionate share of the advertising share of voice.

Paid Search remains the leading media channel, but its continued dominance appears to be a direct response to a decline in organic discovery, forcing institutions to actively "buy" their way into the consideration set of prospective students. A strategic reallocation of budgets toward Social and Video channels is also evident, reflecting a shift in how institutions are seeking to engage with their target audience.

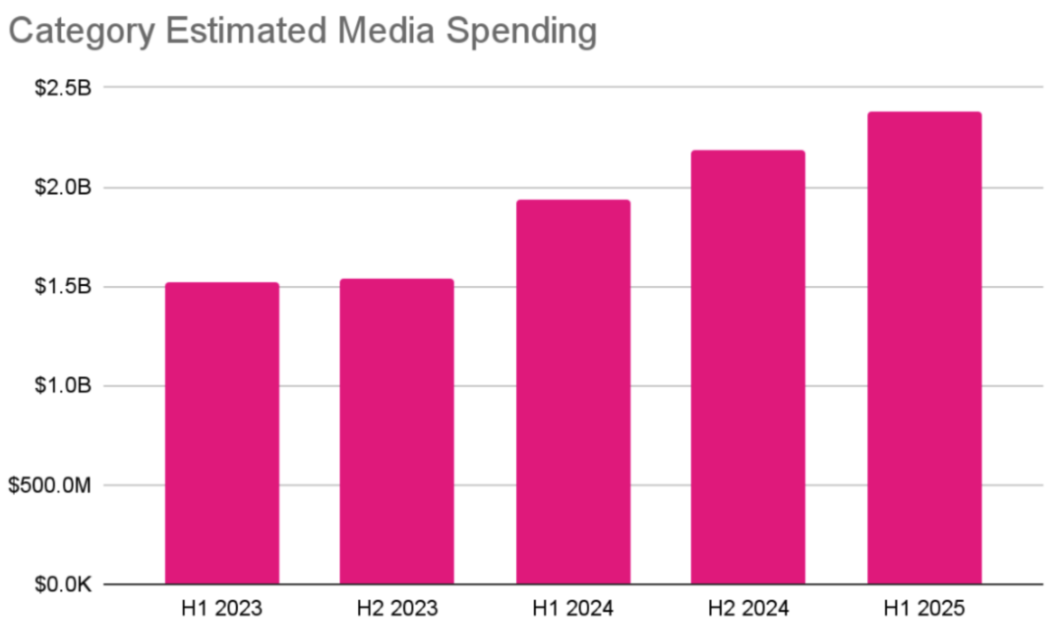
An in-depth pacing analysis reveals what appears to be front-loading of marketing budgets in the first half of the year, signaling intensified competition for early-cycle enrollments. Creative messaging themes have evolved to reflect this new reality, emphasizing authenticity, personalized outcomes, and career readiness, a departure from more traditional branding narratives. Ratings continue to be important within advertising creative, despite the criticisms of methodology and intention.

The data reveals a complex relationship between investment and enrollment, with a weak correlation noted in some studies, which suggests that increased investment is more a strategic necessity for maintaining market presence and staving off competition than a direct driver of robust enrollment growth.[2] The higher education landscape has never been as dynamic as it is now. Our analysis concludes that to overcome economic pressures, a strategic, agile, and data-driven investment approach is required to succeed.

Chapter 1: The Evolving Higher Education Marketing Landscape

1.1 Macro Trends in Higher Education Marketing Spend (2023-H1 2025)

The higher education marketing sector has demonstrated a remarkable pattern of growth in media spending over the past two and a half years. From 2023 through the first half of 2025, the category has shown a steady increase with total spending figures reflecting this trend. In 2023, the total media spend across all channels was over $3.0 billion. This figure increased to nearly $4.1 billion in 2024, and the first half of 2025 alone has already seen an expenditure of over $2.4 billion. This consistent increase is indicative of a category that is making significant, sustained investments to reach its audience.



It is important to understand the underlying reasons for this financial escalation. Rather than signaling a booming market with overflowing demand, this rise in spending is a reaction to substantial market pressures. The data indicates a weak association between advertising expenditures and new student enrollments.[4] Instead of being a direct driver of growth, the increased spending appears to be a necessary defensive strategy. Institutions are investing more to maintain their market position and attract a smaller pool of prospective students amidst a backdrop of "steady declines in overall higher education enrollment".[5] This suggests that the cause of rising advertising budgets is not necessarily a successful return on investment but a strategic response to market saturation and heightened competition, along with the current regulatory environment.

In terms of which programs colleges support with their marketing dollars, online programs and courses represented 26% of total enrollment in 2022, yet it consumed nearly a third of college marketing and communications budgets. The unbalanced marketing investment for online courses is a significant reason why so few online programs are revenue positive. Either way, the same post sources a survey showing that nearly half (47%) of higher education administrators plan to increase their budgets for online programs."[6]

To put overall [higher education] HE spend into a broader context, "For the past seven years corporations averaged investing just over 11% of total revenue to marketing. In 2021, that dropped precipitously — no doubt a consequence of the pandemic's economic impact — to just 6.4% of total revenue. Still, corporations invest 4x more compared to higher education which averages allocating just 1.6% of total revenue to marketing expenditures."[7]

1.2 The Broader Context: External Pressures and Strategic Response

The higher education sector faces a number of external challenges, including a shifting socio-political climate, rising educational costs, and a decline in the high school graduate population in many regions.[8] These pressures are forcing institutions to fundamentally rethink and adjust their marketing strategies.

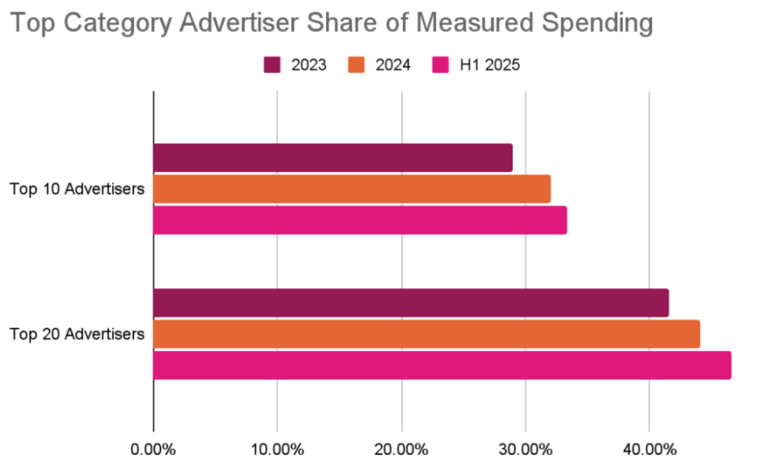
A significant divergence in approach is becoming increasingly apparent between different types of institutions: Newer, online-focused universities prioritize a direct-response marketing model to drive enrollment, a strategy reflected in their high advertising spend. By contrast, traditional elite universities allocate a much larger portion of their budgets to fundraising and development, relying on their established brand prestige and alumni networks to attract students and resources.

This strategic separation highlights a foundational shift in the market's priorities and the erosion of traditional enrollment channels for many institutions. The increasing reliance on paid media channels suggests a crisis in traditional, organic enrollment funnels. As prospective students increasingly turn to digital platforms and AI-powered search tools to actively seek information, institutions are compelled to use paid channels to ensure visibility.5 This shift reveals a profoundly different student journey and an increasing challenge for institutions to build brand equity organically. The market is transitioning from a world where students discover institutions to one where institutions must pay to be found by students.

Chapter 2: Competitive Dynamics: The Scale and Strategy of Top Advertisers

2.1 The Ascendancy of the Top 10

The higher education marketing landscape is dominated by a small number of key players who command a disproportionate share of the advertising spend. These institutions are primarily online, for-profit, and non-traditional universities.



Source: MediaRadar (formerly Vivvix), Jan 2023 - June 2025, broken out into half years Jan-Jun and Jul-Dec), as analyzed by Kiosk

An analysis of the top 30 advertisers shows a clear hierarchy in spending power.

Advertiser Name	SUM of 2023	SUM of 2024	SUM of H1 2025	2023 Rank	2024 Rank	2025 Rank
University of Phoenix	$162.2M	$194.5M	$140.2M	1	2	1
Western Governors University	$126.3M	$218.6M	$104.8M	2	1	3
Southern New Hampshire University	$103.3M	$159.3M	$105.1M	3	3	2
Arizona State University	$86.6M	$137.4M	$88.0M	4	4	4
Purdue University	$80.9M	$111.7M	$42.9M	5	6	13
Capella University	$76.8M	$117.0M	$85.1M	6	5	5
Walden University	$67.8M	$69.3M	$43.9M	7	12	12

National University	$66.3M	$86.7M	$51.9M	8	10	8
University of Maryland, Global Campus	$62.4M	$82.3M	$50.3M	9	11	9
DeVry University	$53.1M	$103.6M	$65.5M	10	8	6
Grand Canyon University	$53.0M	$89.4M	$56.6M	11	9	7
Liberty University	$51.4M	$105.9M	$46.5M	12	7	10
Keiser University	$39.9M	$44.1M	$32.2M	13	16	15
Strayer University	$38.5M	$43.9M	$24.1M	14	17	17
Johns Hopkins University	$34.6M	$48.1M	$22.1M	16	14	19
Massachusetts Institute Of Technology	$34.0M			16		
Colorado Technical University	$33.7M	$35.6M	$16.6M	17	19	29
Maryville University	$32.8M			18		
University of Arizona	$32.3M	$35.1M	$21.3M	19	20	22
University of Pennsylvania	$19.1M			20		
University of Massachusetts	$18.7M	$29.7M	$22.8M	21	24	18
Post University	$18.1M	$26.1M	$16.3M	22	26	30
Northeastern University	$16.7M	$23.2M	$19.1M	23	27	23

University of Maryland System	$16.5M			24		
University of Texas System	$16.3M	$23.2M	$17.0M	25	28	27
University of North Carolina System	$13.6M			26		
University of California	$13.6M	$23.1M		27	29	
University of Cincinnati	$12.					
Louisiana State University	$11.3M			29		
Cornell University	$11.9M			30		
Chamberlain University	$26.6M	$52.2M	$44.6M	23	13	11
Bryant & Stratton College	$14.0M	$31.1M	$32.			
Colorado State University	$29.3M	$47.3M	$26.5M	21	15	16
NYU New York University	$7.9M	$13.5M	$22.1M	70	53	20
Georgetown University	$10.3M	$32.2M	$21.7M	49	21	21
Rasmussen College		$35.9M	$17.9M		18	25
American Public University		$30.3M			23	
Penn State University		$28.8M	$19.0M		25	24
Coursera Inc.			$17.8M			26
South College			$16.9M			28

Source: MediaRadar (formerly Vivvix), Jan 2023 - June 2025, broken out into half years Jan-Jun and Jul-Dec), as analyzed by Kiosk

2.2 The Competitive Chasm: Top 10 vs. The Next 20

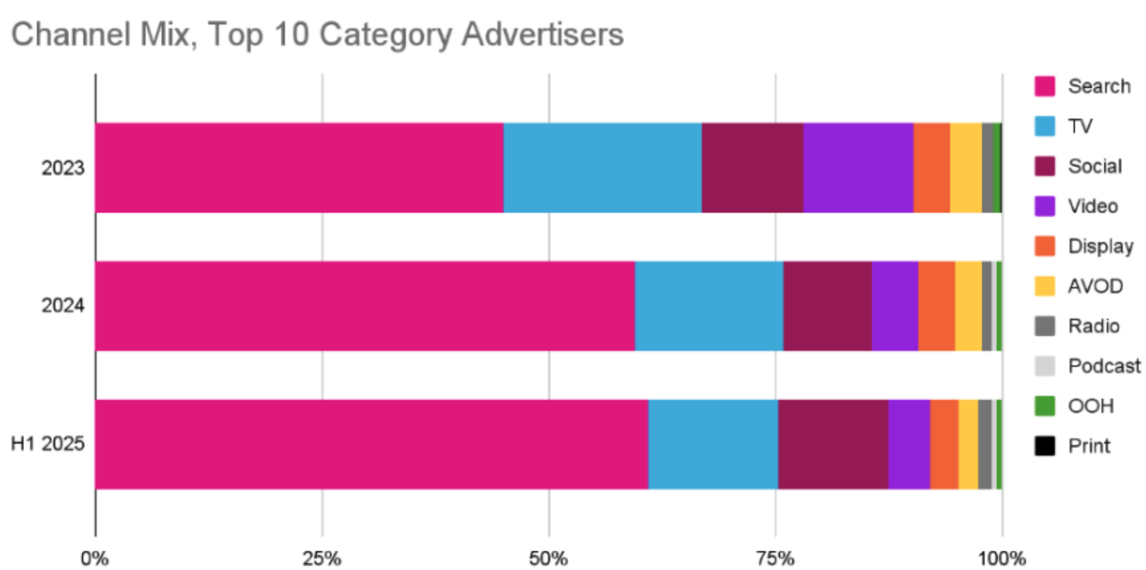
A deeper look at the spending data reveals a dramatic chasm between the advertising budgets of the Top 10 and the next 20 institutions. For example, Western Governors University, the top spender in 2024, allocated over $218 million to advertising, while the 20th-ranked advertiser, NYU New York University, spent just over $13 million that same year.[9] In H1 2025, Liberty University, ranked number 10, spent $46.5 million, which is still a significant difference from the $22.1 million spent by NYU New York University, ranked at number 20.[10]

This sheer scale of investment by the top institutions creates a significant barrier to entry and a "winner-take-all" dynamic in the digital advertising space. In channels like paid search, where a large portion of the budget is allocated, competition for keywords drives up costs. The enormous budgets of the top players allow them to bid aggressively, potentially pricing smaller institutions out of the most valuable advertising opportunities. This can force smaller and mid-tier institutions to either adopt highly niche keyword strategies or diversify their efforts into other channels. This competitive chasm solidifies the market dominance of the top players and makes it increasingly difficult for institutions with fewer resources to compete effectively in a head-to-head digital marketing battle. Innovative program and marketing strategies are required to differentiate in this crowded marketplace.

2.3 Deeper Dive into the Top 10 Advertisers

Most higher education advertisers have a heavy digital mix in their advertising as discussed in further detail in Section 3. The top 10 advertisers exhibit spending patterns that distinguish them from the rest of the market, Paid Search spending for the Top 10 Advertisers has increased since 2024 at a greater rate than the category as a whole, now accounting for 61% of measured media spending.

Unlike the category as a whole, where the Social and Display follow Search, Top 10 Advertisers still invest in traditional TV. While the channel's share has decreased, it still gets the second largest share of media spending after Search. Also unique to the category as a whole, Video spending is greater than Display for the top 10 advertisers. This is likely because the Top 10 Advertisers have determined that they have maximized (or saturated) their investment in Search and need to actually sell the category to generate more search demand, i.e. they are purchasing a very high share of the searches that they purchase, so much so that they have to move to other channels to find new audiences and interest.



Source: MediaRadar (formerly Vivvix), Jan 2023 - June 2025, broken out into half years Jan-Jun and Jul-Dec), as analyzed by Kiosk

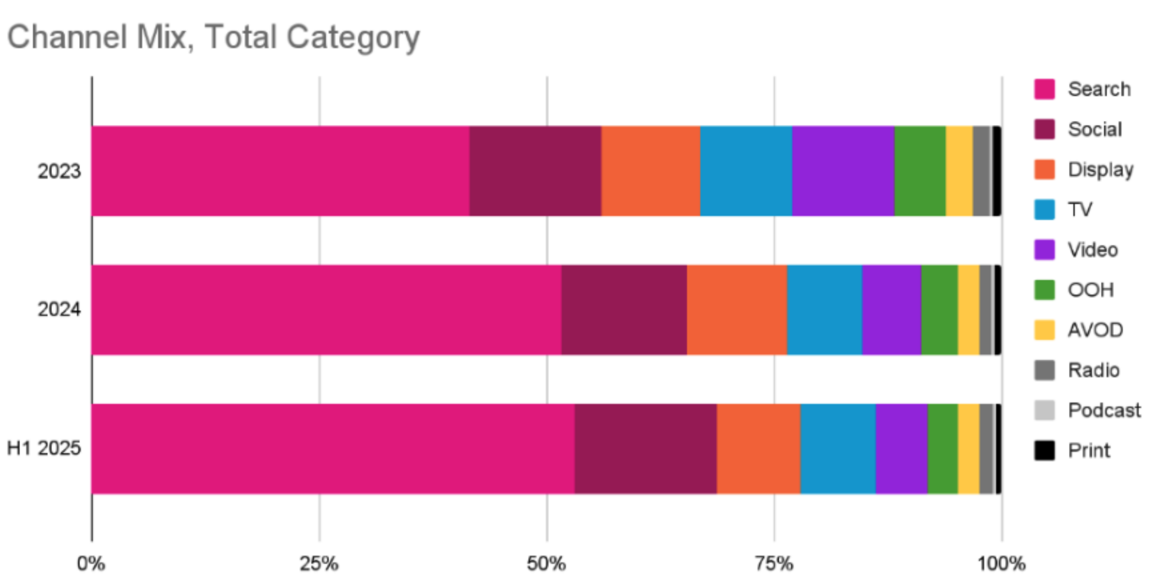
A review of their overall campaigns and messaging strategies provides valuable context as well. These institutions consistently focus their marketing on career-focused outcomes, flexibility, and tangible benefits.[11] This messaging resonates with an audience that is increasingly viewing education as a direct pathway to professional advancement.[12]

Chapter 3: Media Mix Mastery: Deconstructing Channel Investment

3.1 The Primacy of Paid Search and the Shift in Media Mix

An analysis of the media mix across all advertisers from 2023 through H1 2025 reveals Paid Search as the undisputed leader. Paid search consistently accounts for the largest percentage of media budgets, commanding a low of 35% and a high of 49% in 2023, and reaching a high of 58% in H1 2025.[13] This continued leadership is particularly notable in light of the declining trend in organic search traffic. The heavy investment in Paid Search is a strategic necessity rather than a pure preference. It is a direct, transactional approach to lead generation, designed to capture prospective students at the precise moment of expressed intent. The dominance of this channel suggests that the student journey is now heavily focused on "active search," with modern learners actively seeking information across various digital platforms.5 This reliance on paid media to capture demand indicates a profound shift in student behavior and signals the erosion of the organic brand equity that once drove enrollment for many institutions.

82% of higher ed marketers view digital marketing as a core part of their marketing strategy. However, less than 60% of higher ed marketers have insight into how leads perform after moving from marketing to enrollment efforts. 31% of marketing departments struggle to correlate their marketing success with enrollment numbers.[14]



Source: MediaRadar (formerly Vivvix), Jan 2023 - June 2025, broken out into half years Jan-Jun and Jul-Dec), as analyzed by Kiosk

3.2 The Rise of the Digital Portfolio: A Detailed Channel Analysis

While Paid Search holds the dominant share, the media mix has evolved to include a more diversified digital portfolio. The data shows a clear strategic shift of budgets toward digital-first channels, including Social. The total spend on Social, for example, grew from $442.5 million in 2023 to $565.6 million in 2024, with spending in H1 2025 already reaching $372.8 million.3 Video spend on the other hand has declined from $341.7 million in 2023 to $267.1 million in 2024, and continues to see outflows with only $135 million spent in H1 2025.[15]

This increasing investment in Social channels reflects a strategic pivot toward engagement and authenticity. The creative messaging on these platforms emphasizes short-form video and authentic storytelling, showcasing real campus experiences and alumni success stories.[16] This approach is designed to meet students where they are, on platforms like TikTok and Instagram, and in a format they prefer.5 The growth of these channels highlights a deliberate strategy to build credibility and connect with a generation of prospective students who demand transparency and real-life insights over polished marketing materials. It is possible that the decline in other video spending is moving to short-form, social video as consumer preferences, particularly in student prospect age groups, is shifting there.[17]

The following tables present the monthly media mix breakdown, illustrating the strategic shifts in spending across channels.

Monthly Media Mix Breakdown - Calendar Year 2023

Channel	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Search	41%	49%	35%	35%	37%	43%	38%	38%	48%	40%	44%	47%
Social	14%	13%	17%	16%	16%	13%	13%	13%	14%	17%	15%	13%
Video	8%	9%	13%	16%	12%	14%	13%	12%	10%	9%	9%	10%
Display	9%	9%	11%	12%	13%	13%	15%	12%	8%	9%	10%	10%
TV	16%	9%	9%	9%	9%	8%	10%	11%	9%	11%	10%	10%
OOH	5%	5%	7%	7%	7%	5%	6%	6%	5%	8%	6%	4%
AVOD	3%	3%	3%	3%	2%	2%	3%	3%	2%	3%	3%	3%
Radio	2%	1%	2%	2%	2%	2%	2%	3%	2%	2%	2%	2%
Print	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Podcast	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%

Monthly Media Mix Breakdown - Calendar Year 2024

Channel	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Search	43%	51%	47%	45%	55%	49%	57%	51%	57%	54%	53%	54%
Social	12%	12%	14%	12%	10%	14%	13%	16%	14%	16%	16%	16%
Display	10%	12%	15%	15%	12%	15%	10%	10%	9%	10%	9%	8%
TV	14%	7%	6%	7%	8%	6%	8%	10%	7%	8%	8%	9%
Video	12%	10%	6%	8%	7%	8%	5%	5%	4%	4%	5%	6%
OOH	4%	3%	5%	5%	4%	5%	4%	3%	4%	4%	4%	3%
AVOD	4%	3%	3%	3%	2%	3%	2%	3%	2%	1%	2%	2%
Radio	2%	1%	2%	2%	2%	1%	1%	2%	1%	1%	1%	1%
Print	1%	0%	1%	3%	1%	1%	0%	0%	1%	1%	1%	0%
Podcast	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%

Monthly Media Mix Breakdown - First Half Year 2025

Channel	Jan	Feb	Mar	Apr	May	Jun
Search	48%	55%	41%	58%	58%	58%
Social	16%	14%	21%	14%	15%	16%
Display	10%	11%	12%	8%	7%	8%
TV	14%	8%	8%	7%	7%	6%
Video	6%	6%	7%	6%	5%	4%
OOH	3%	3%	5%	3%	3%	3%
AVOD	2%	2%	3%	3%	2%	3%
Radio	1%	1%	1%	2%	2%	2%
Print	0%	0%	1%	1%	1%	0%
Podcast	1%	1%	1%	0%	0%	0%

3.3 Cost Benchmarks for 2025

A recent report from UPCEA[18] sets a nationwide benchmark for cost per inquiry for continuing and online education marketing.

Cost per Inquiry Benchmark	$140
Undergraduate programs	$128
Graduate programs	$157
Non-credit programs	$51

Cost per Student [Enrollment] Benchmark	$2,849
Undergraduate programs	$1,505
Graduate programs	$3,804
Non-credit programs	$599

Chapter 4: The Narrative: Creative and Messaging Themes

4.1 Spotlight on Top Advertisers: Creative and Messaging

In a crowded marketspace, differentiation is a critical element to finding and attracting learners who would best benefit from your institution. Creative messaging is the way that institutions can tell these stories about differences to prospective students and their influencers (families, employers, mentors, loved ones).

As an illustration of the importance of differentiation, an analysis of creative messaging from the top advertising institutions demonstrates how each provides a slightly different take on their benefits. Southern New Hampshire University (SNHU) plays to their affordability and that they have a physical campus. University of Phoenix highlights their empathy to adult learners and utilizes lifestyle social media influencers to connect with “real” stories. Western Governors University (WGU) speaks to employer trust and scholarship. And Arizona State University (ASU) focuses on their rankings, innovation and heritage as a prestigious institution.

Aspect	SNHU	Univ. of Phoenix	WGU	ASU Online
Core Hook	Affordability, flexibility, campus	Empathy, work–life balance, influencers	Accreditation, employer trust, scholarships	Rankings, innovation, faculty expertise
Tone	Optimistic, institutional	Conversational, peer-to-peer	Authoritative but personal	Prestigious, data-backed, student-focused
Visual Motifs	Campus shots, smiling individuals	Vertical reels, lifestyle influencers	Grad photos, testimonials, WGU blue palette	Yellow overlays, graduation, faculty shots
Value Props	Low cost, flexible schedule	Short courses, life tips, career pivots	Low cost, trusted by employers	Top rankings, employability, customization
Call-to-Action	“Apply today,” “Schedule visit”	Soft or indirect (tips, stories)	“Learn more,” “Apply now” (scholarships)	“Learn more,” “Request More Information”

Source: Kiosk, 2025, September 10, Analysis of Top 10 Advertiser’s Creative Messaging

The messaging and creative content of the top advertisers are a direct reflection of a market shift from "education as an experience" to "education as a product." These institutions are not selling the idea of a four-year college experience but are instead marketing their programs as practical, career-oriented tools for professional advancement.

For example, the University of Phoenix’s campaigns, such as "Tortoise and Hare" and "Evelin," center on themes of competency-based learning and career-focused outcomes.[19] The messaging is designed to appeal to adult learners who need flexible, efficient, and direct paths to a master's degree or new career. Similarly, Southern New Hampshire University's (SNHU) messaging highlights the practical skills acquired through its programs, such as digital marketing and social media analytics, and emphasizes the direct application of learning to various job roles.[20] Western Governors University (WGU) also employs a similar strategy, focusing on the high-impact skills students will learn and the specific job titles and salaries they can achieve upon graduation.[21] This messaging strategy is a powerful competitive tool in an era where the rising cost of education necessitates a clear and demonstrable return on investment.

4.2 The Rise of Brand Awareness for Mid-Tier Institutions

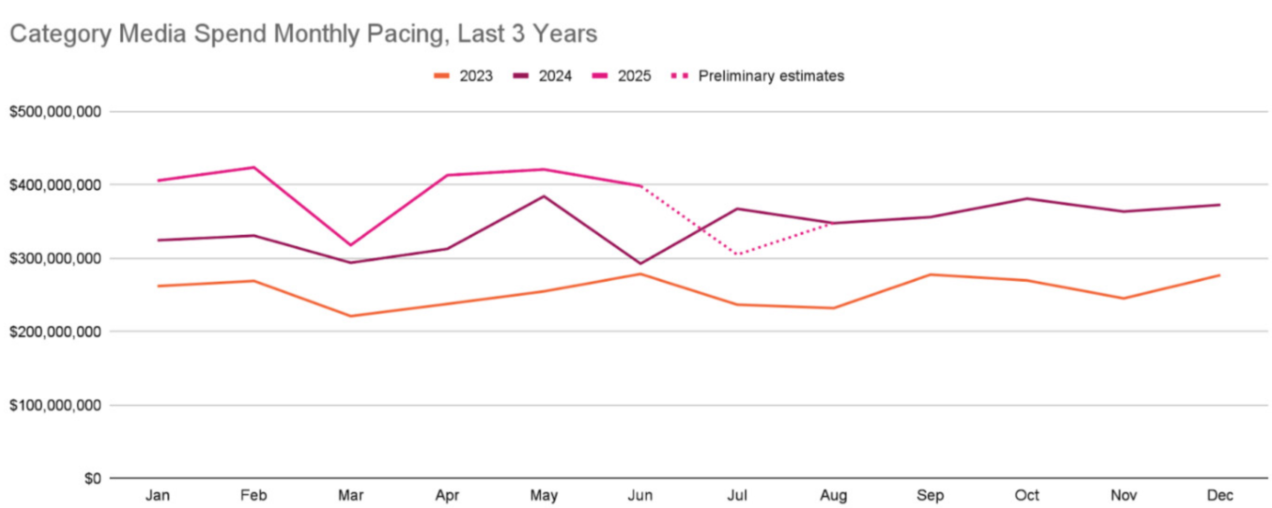
The data reveals a trend of mid-tier institutions beginning to increase their investment in brand awareness. This shift is a necessary response to a market dominated by the massive advertising budgets of the Top 10 advertisers. Institutions that cannot compete in a head-to-head paid search battle are compelled to find alternative strategies to stand out.

Messaging focusing on their institution's core strengths/mission can be a more powerful way to cut through the tactical messaging that dominates some of the bigger players' communications.
By allocating resources to brand awareness through content marketing, social media, and PR, these institutions are moving from a reactive, direct-response advertising model to a more proactive, long-term brand-building effort. This strategy allows them to build a unique identity, foster credibility, and differentiate themselves from the product-centric messaging of the larger online universities. In a market where students increasingly value authenticity and transparency, this is a strategic move to build a stronger foundation for future enrollment cycles and ensure long-term viability.

Chapter 5: Pacing, Agility, and The Future Outlook

5.1 Year-over-Year Pacing Analysis: A Story of Urgency

The monthly spending data for all advertisers reveals an interesting and significant trend in pacing. The monthly spending totals show a clear front-loading of budgets in the first half of the year, particularly in January and February. In 2025, spending in January and February reached $405.8 million and $423.8 million, respectively, substantially higher than in previous years.[22] Furthermore, spending in April and May of 2025 was over $413 million and $421 million, respectively, suggesting a faster rise out of the March lull compared to previous years.[23] The data also shows a less pronounced lull in June of 2025, with a spend of nearly $399 million.[24]



Source: MediaRadar (formerly Vivvix), Jan 2023 - June 2025, broken out into half years Jan-Jun and Jul-Dec), as analyzed by Kiosk

It will be interesting to see if this is an intentional "front-loading" of budgets in the calendar year, which could indicate a heightened sense of urgency and intensified competition for early-cycle student acquisition, or if this is just an overall increase in investment in the category as a whole in H1 2025. Historically, the third and fourth quarters were major periods for enrollment marketing. However, early reads on July and August 2025 investment project a potential softening in the market at the start of many Academic Calendar years. This early data suggests the uncertainty in the market at the start of the most recent fiscal year may be impacting the ability for investment in student acquisition. There have been many articles citing investment impact across institutions. With this uncertainty, the market will continue to need to be agile, responsive, and increasingly reliant on continuous, year-round marketing efforts to maintain a competitive edge.

5.2 Investment In Systems and Support

The monthly spending data for all advertisers reveals an interesting and significant trend in pacing. The monthly spending totals show a clear front-loading of budgets in the first half of the year, particularly in January and February. In 2025, spending in January and February reached $405.8 million and $423.8 million, respectively, substantially higher than in previous years. Furthermore, spending in April and May of 2025 was over $413 million and $421 million, respectively, suggesting a faster rise out of the March lull compared to previous years. The data also shows a less pronounced lull in June of 2025, with a spend of nearly $399 million.

- **Web:** While every institution has a website and most recognize the importance of their online presence, having a website assists prospective students in finding information and increasingly it helps AI LLMs find information to deliver to prospective students through their LLM prompts.

- **SEO / Organic Content:** Synonymous with the web is the development of relevant content that answers prospective students questions. Increasingly we also see that Gen Z find content and perform searches through their social media platforms over traditional search engines and even LLMs.

- **Enrollment Coaching:** Individuals or at this stage, chatbots, designed to help prospects find their way through the application and enrollment process to ensure success.

- **CRM / SIS:** A strong system to capture inquiry volume and facilitate conversations with prospects so that their unique information is able to be leveraged to help them through the enrollment process.

- **Email Marketing / MMS:** Increasingly prospective students do not answer their phones, nor do they want to speak to a human, however they are willing to engage in a text conversation or chat to share information and gain valuable insights. A program and platform to facilitate these interactions is important. And email marketing is still a valuable tool for sharing complex information and deadlines.

- **Alumni / Past Participants:** Alumni and past participants are not always thought of in enrollment marketing beyond providing testimonials, however, "word of mouth" is built from proud alumni and past participants who are active promoters of their programs and institutions, engaging with and encouraging participation provides a strong base to build organic interest and word of mouth traffic.

5.3 The Future Outlook

Our analysis shows that institutions are increasing their investment in measured media in the face of a dynamic enrollment environment. There are structural shifts in demographics, consumer interest and external support for higher education, along with external threats to enrollment through policy limitations. Creating an enrollment marketing plan in paid, measured media is just one component of a good marketing plan. Differentiation of products, programs and the institution are beneficial to continuing to find prospects who will want to enroll at your institution. The Top 10 institutions will have to take on the mantle of "selling the category" while mid-tier and lower tier institutions should focus on ways to meaningfully differentiate their offerings.

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