

**Simpson
Scarborough**

The Higher Ed CMO Study 2025-26

Chapter 1: Budgets & Staffing





February 26

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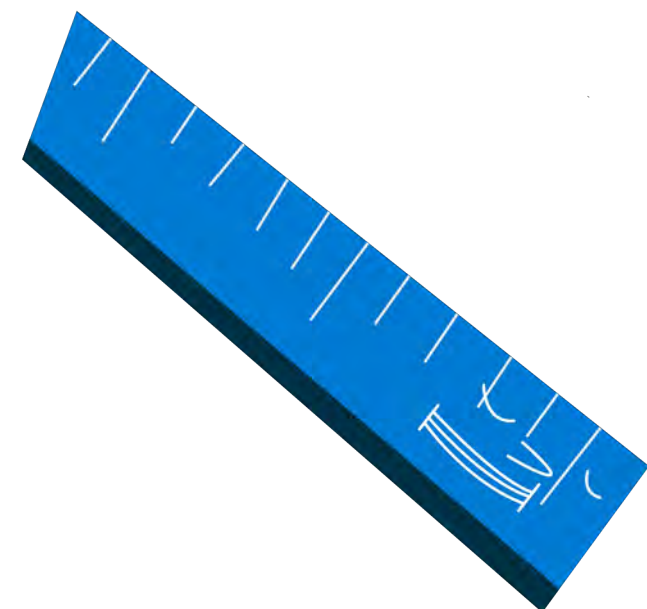
The Fragmented Foundation of the Alignment Gap



March 26

Chapter 2: Growth Ambitions

A Misaligned Agenda



April 23

Chapter 3: Measurement

Where the Alignment Gap Becomes Visible

The Team



Murray Simpson
SVP Growth
SimpsonScarborough



Jenny Petty
VP Industry Relations & Advisory
SimpsonScarborough

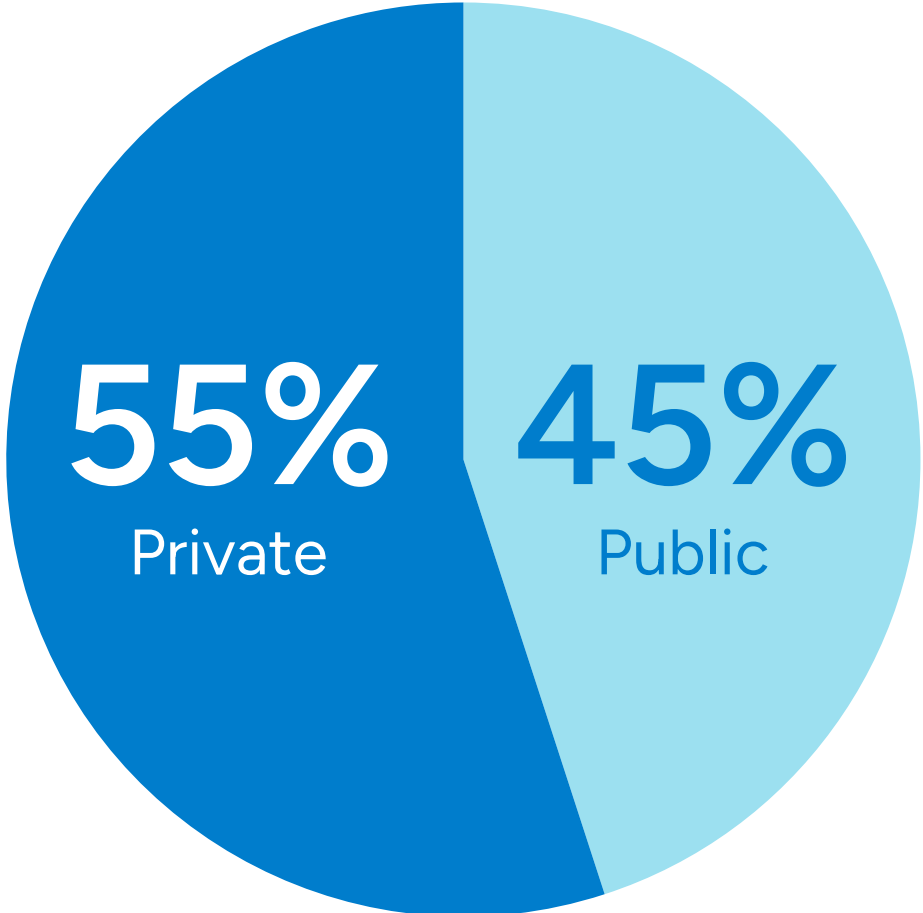


Bill Campbell
VP of Operations & Communications
Chatham University

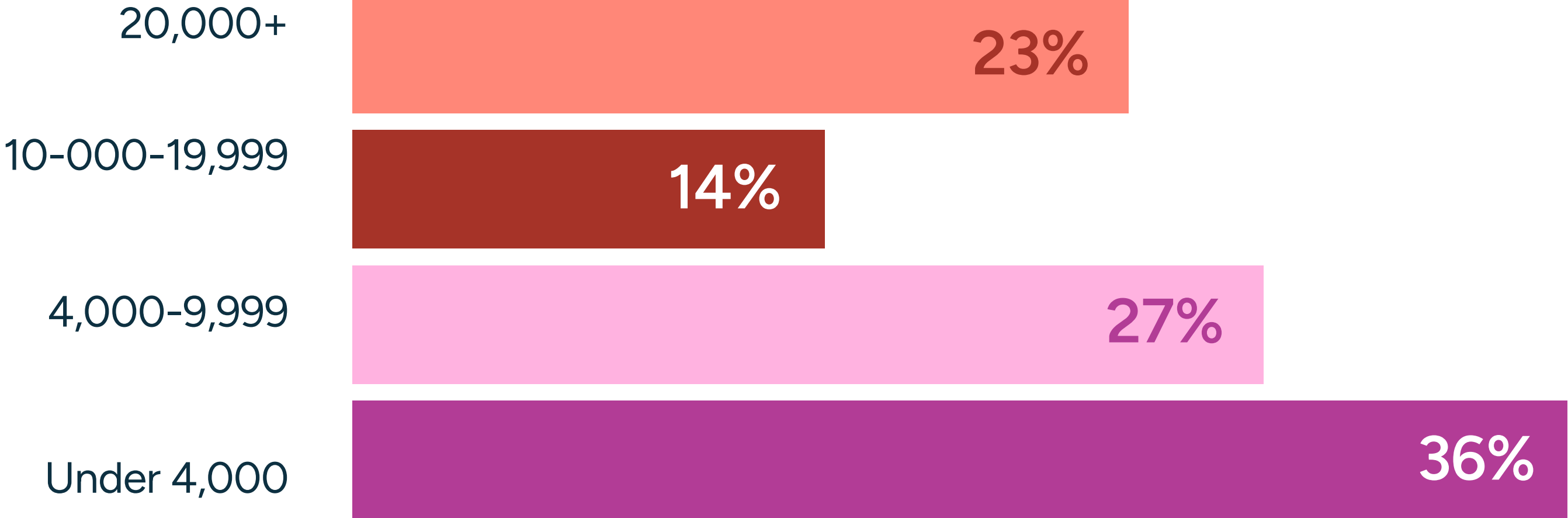
Sector

100%

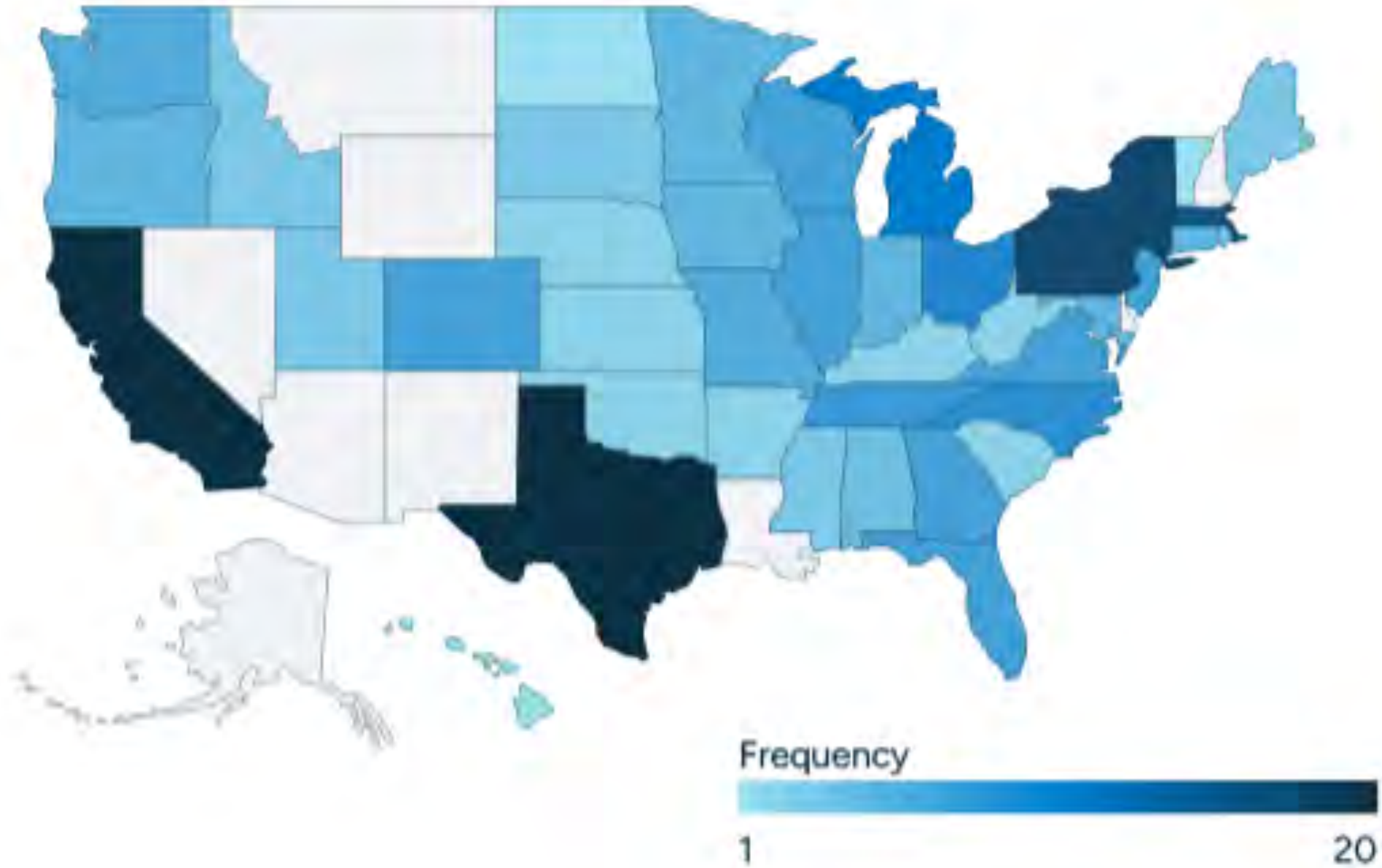
are 4+ year & not-for-profit institutions



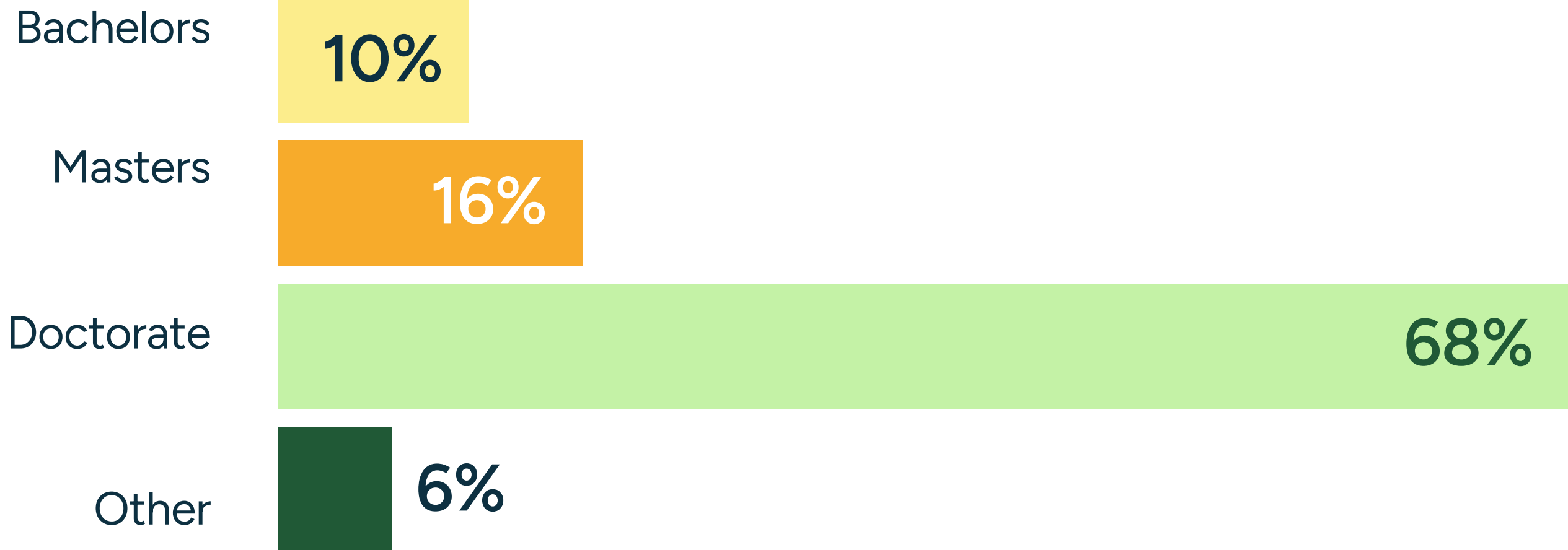
Total Enrollment



Geographic Distribution

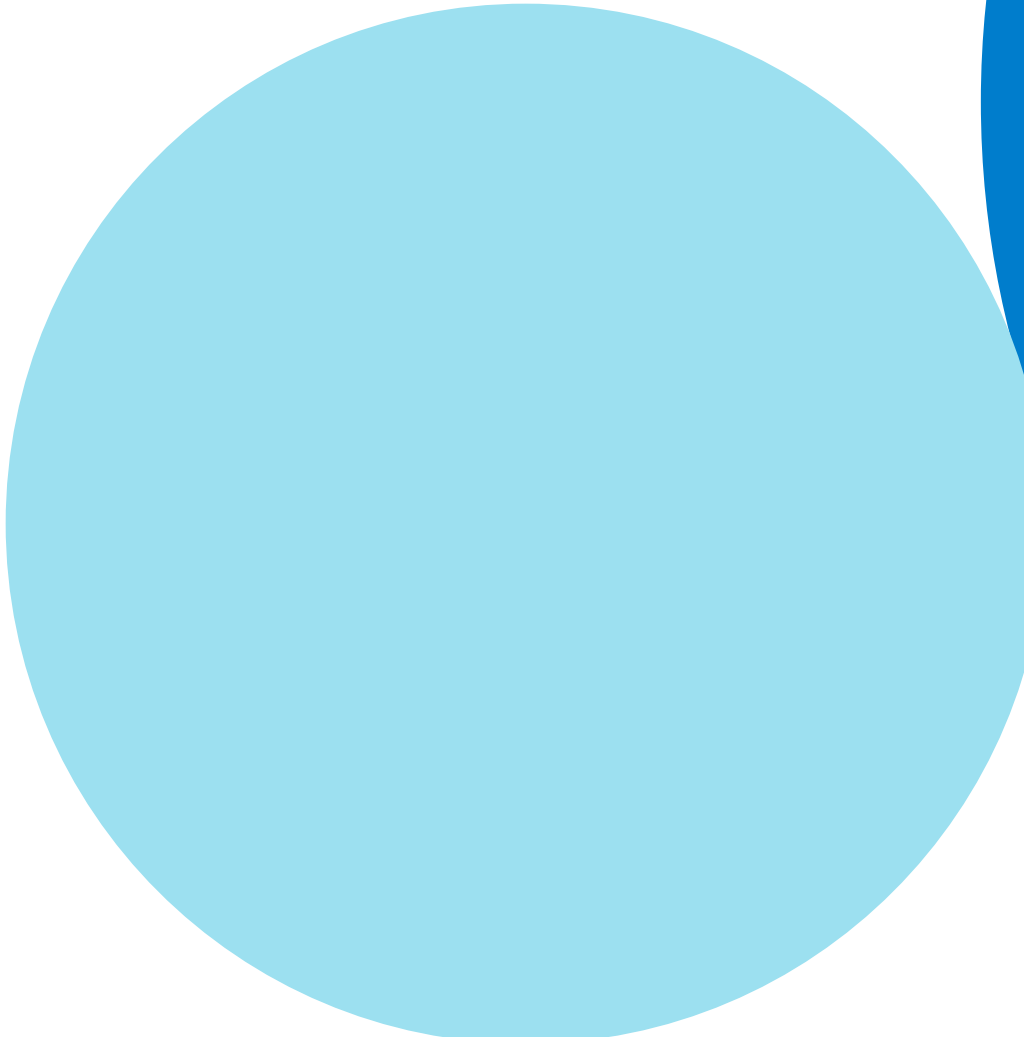


Highest Level of Offering

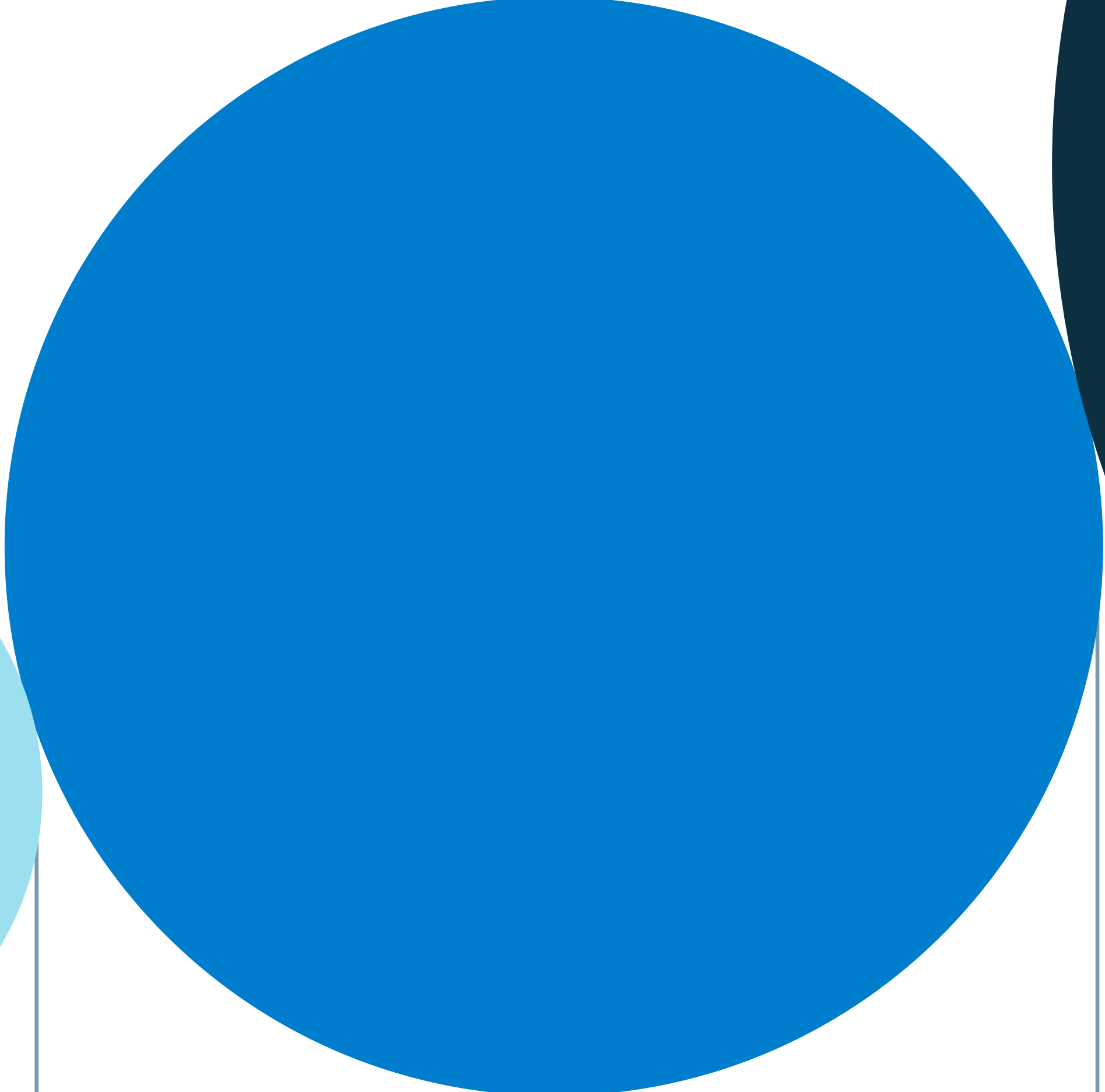


Size Definitions

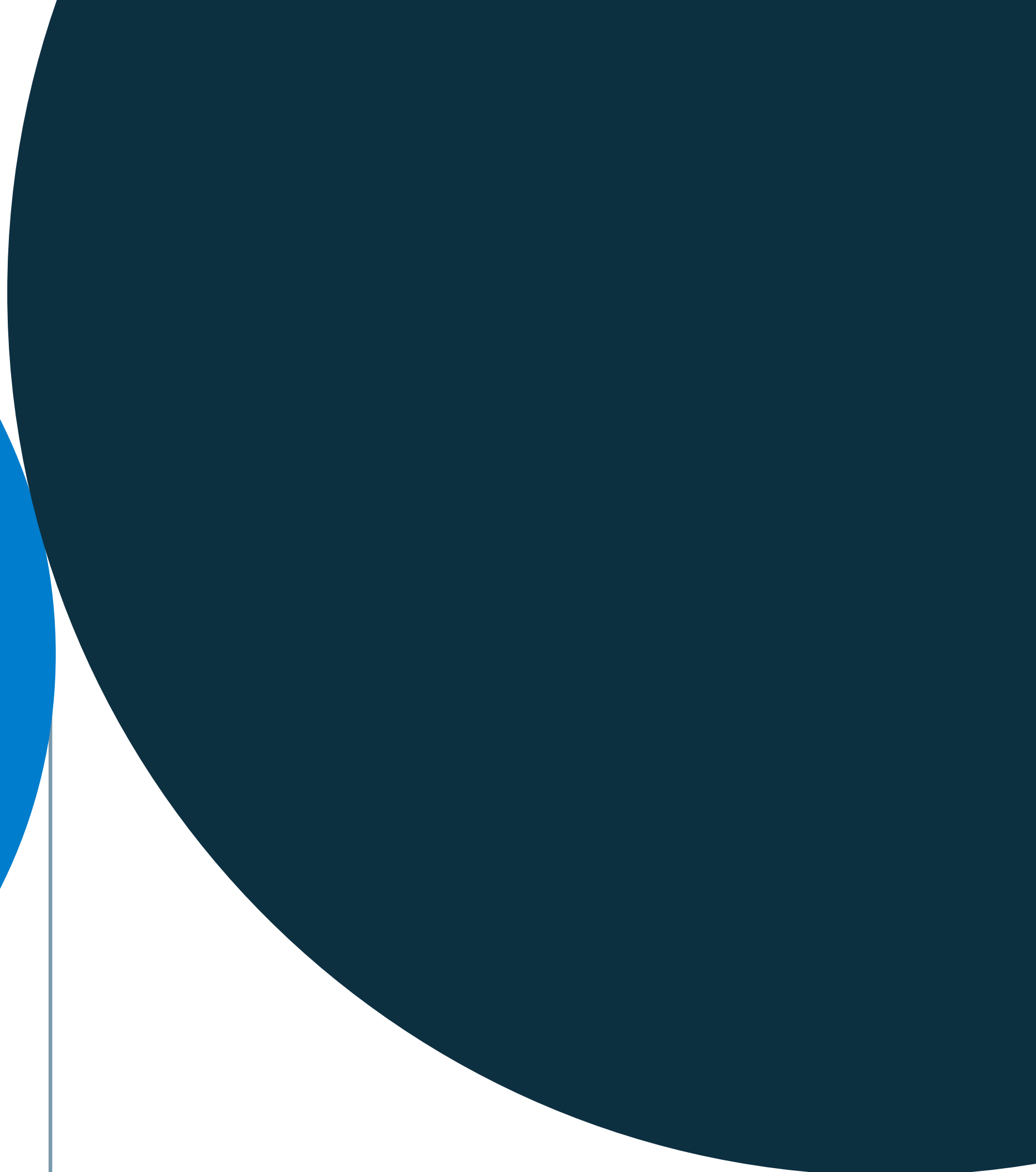
Full time equivalent enrolled.



Small Schools
< 3,999
FTE Students



Medium Schools
4,000-19,999
FTE Students



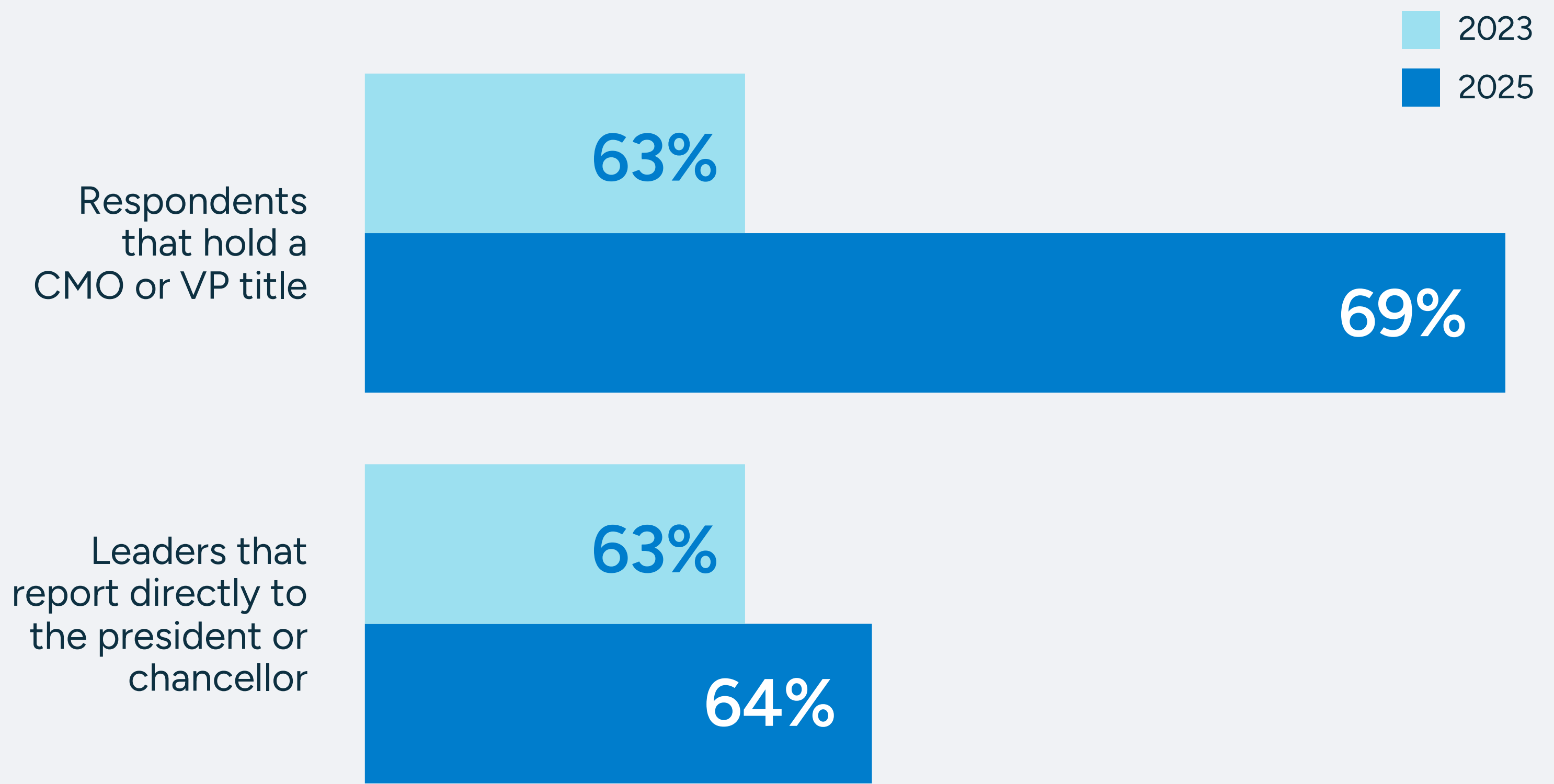
Large Schools
20,000+
FTE Students

01 The *data*

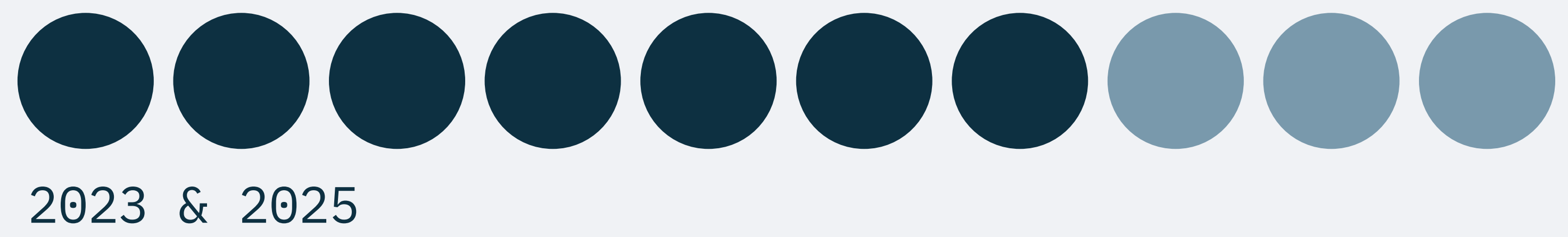
Higher ed
marketing
leaders
have the seat.



Let's start with the good news: higher ed marketing is widely recognized as a senior function.



7/10 sit on the cabinet at their institution.



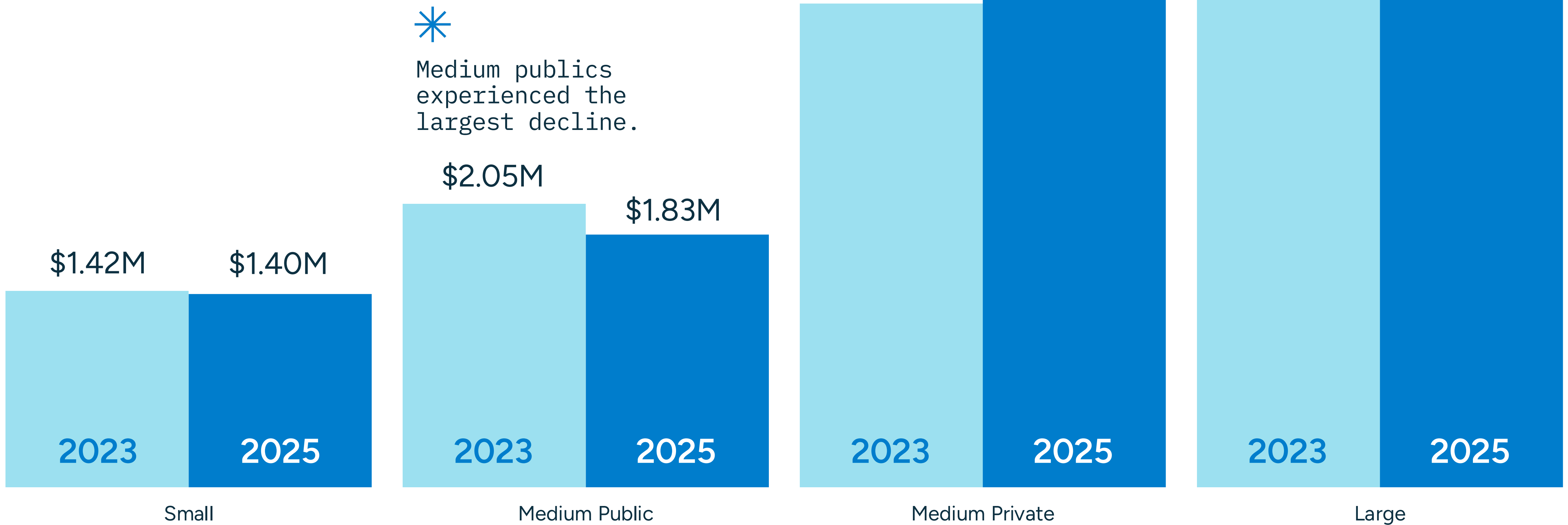
Just because marketing
has the seat doesn't
mean *they have the say.*

Next let's
move into
budgets...



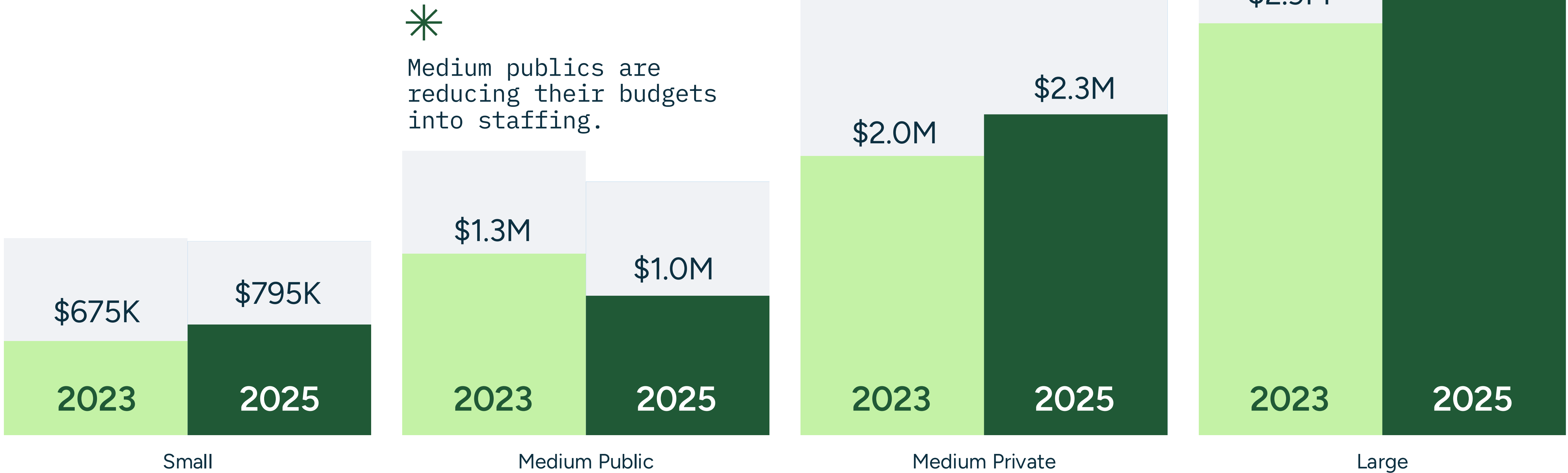
We're not in one higher
ed marketing economy.
We're in several.

Growth favors medium private and large institutions.



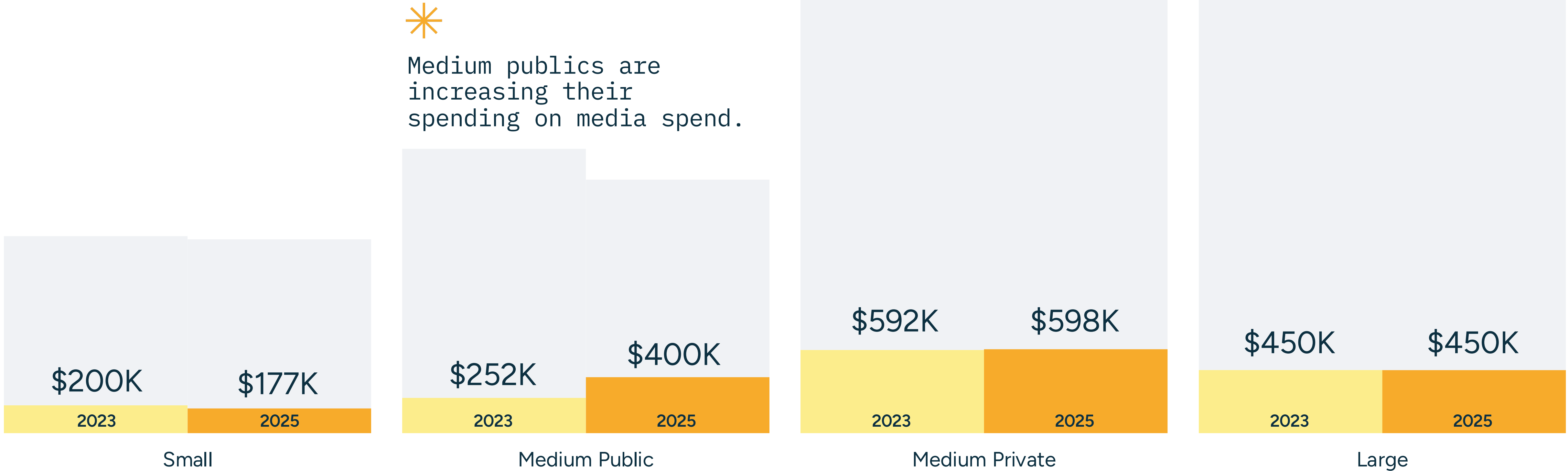
Median central marcom total budgets by school size

A significant share of growth is going to payroll.



Median central marcom staffing budgets by school size

Medium publics are cutting across the board, but growing digital.

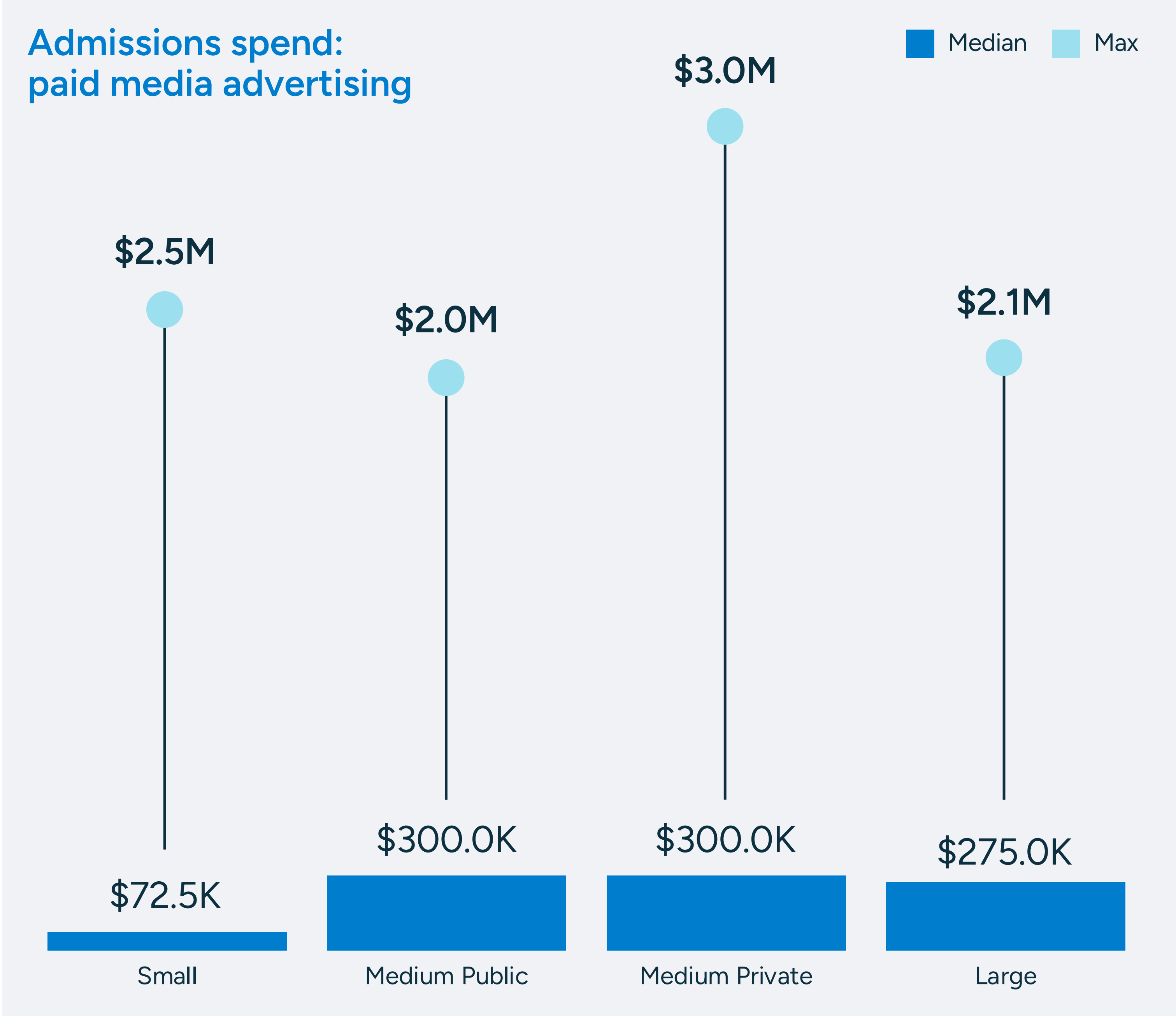


Median digital spend by school size

The budget wild card...



Admissions budgets are the wild card.



College is 'overrated'...
I don't see the use of a degree
in this day and age.

-Newsweek

For at least a quarter of college
graduates, college does not
appear to pay off.

- New York Fed

You graduate out of college, you're up to eyeballs in
debt, you can't get a job, then you can't pay it off.
What's the point?

- CBS News

**A degree is often the most expensive
permission slip you ever buy.**

- Reddit r/MarketWatch

Only one-in-five Americans believe a four-year
degree is worth incurring debt.

- Pew Research

**Higher Education
on the Edge**

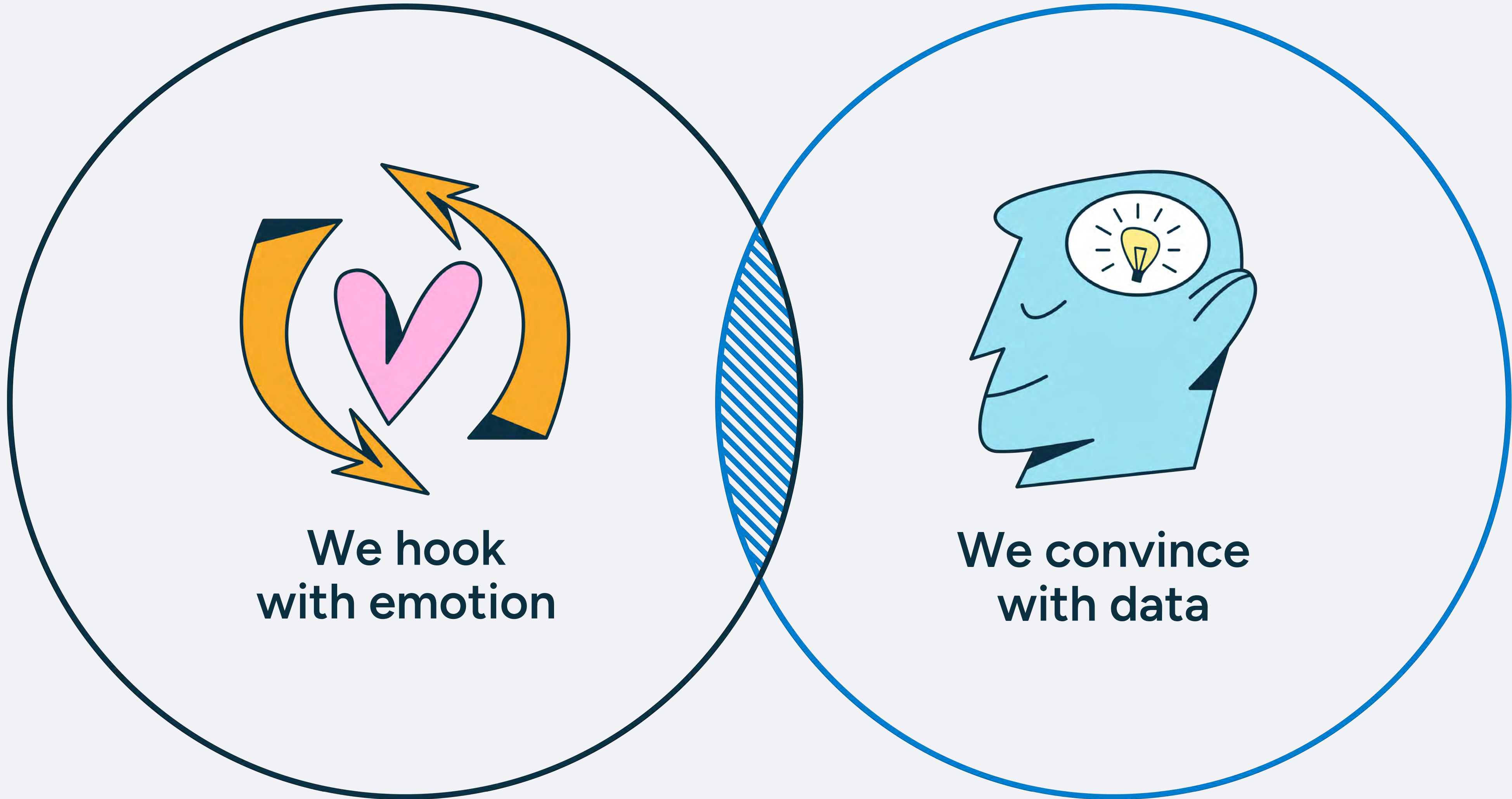
- U.S. News & World Report

**Americans are increasingly dubious
about going to college.**

- NBC News

**College has become both
overpopulated and underproductive.**

-The Washington Post



Integrating Brand and Performance

90%

of brands that outperform the competition have **completely or mostly** integrated brand and performance advertising.

Over-investing in performance advertising can **reduce return on investment** by between

20%-50%.

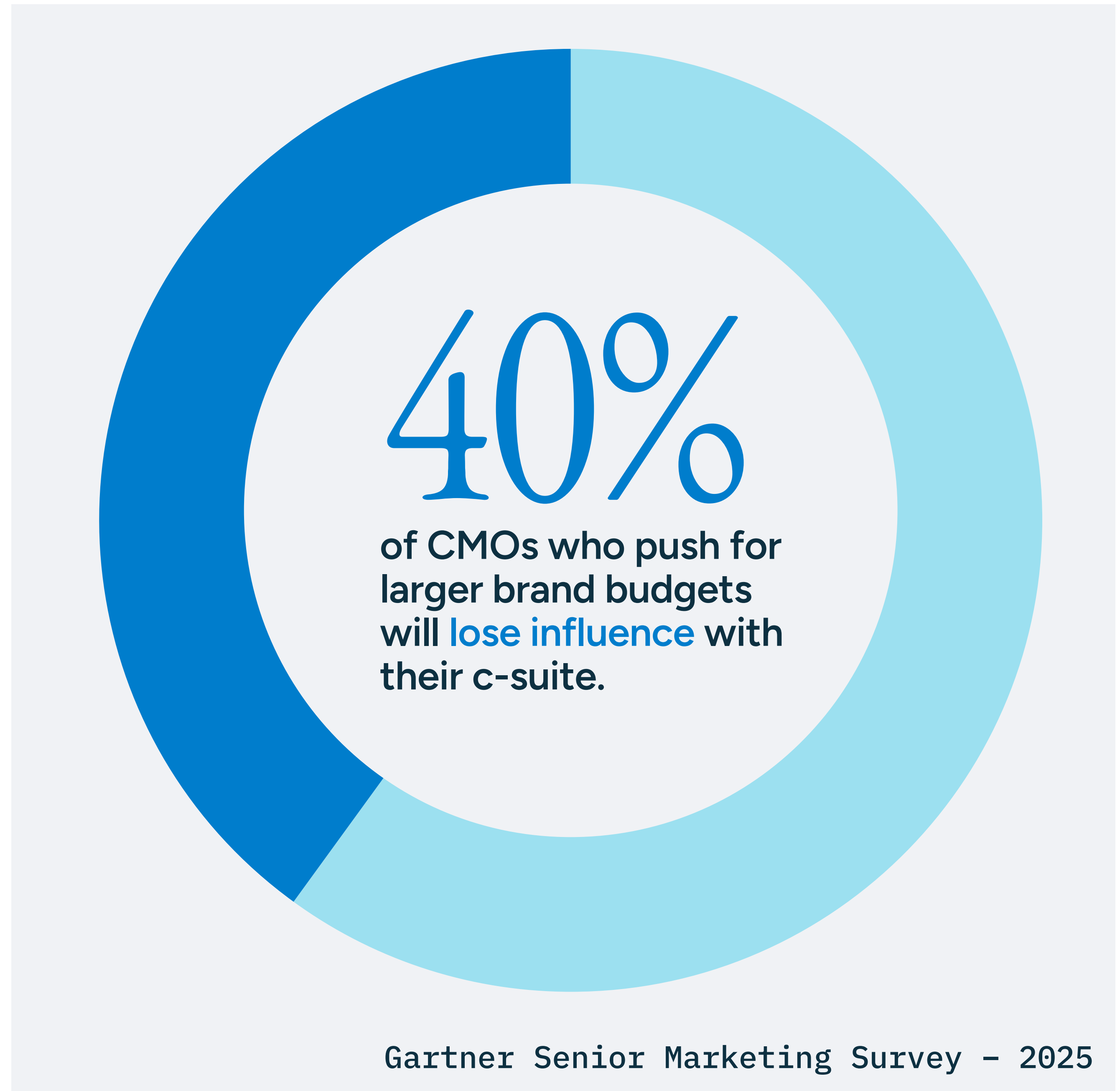
World Advertising Research Centre – 2025

Efficiency Tax

- ➔ Frequency is ramped
- ➔ Reach is constricted
- ➔ Auction competition increases



But what's the risk?





CMOs who break that loop with a clear, decision-ready ROI story keep budgets at the level they need — and their C-suite influence.

Sharon Cantor Ceurvorst
VP, Research
Gartner Marketing Practice

Higher ed
marketing
leaders have
the seat.

What they need
next is the system.



02 The *Alignment* Gap

Alignment Gap *noun*

uh-LINE-mint gap

The space between what leadership intends, what central teams design, and what actually happens day to day across decentralized units.



Where misalignment shows up

Pricing

Marketing is accountable for enrollment but are not included in pricing decisions.

Academic Portfolio Decisions

Programs are added or removed without market research, messaging strategy, or audience clarity.

Experience Design

Recruitment promises are not aligned with student experience reality.

Product Development

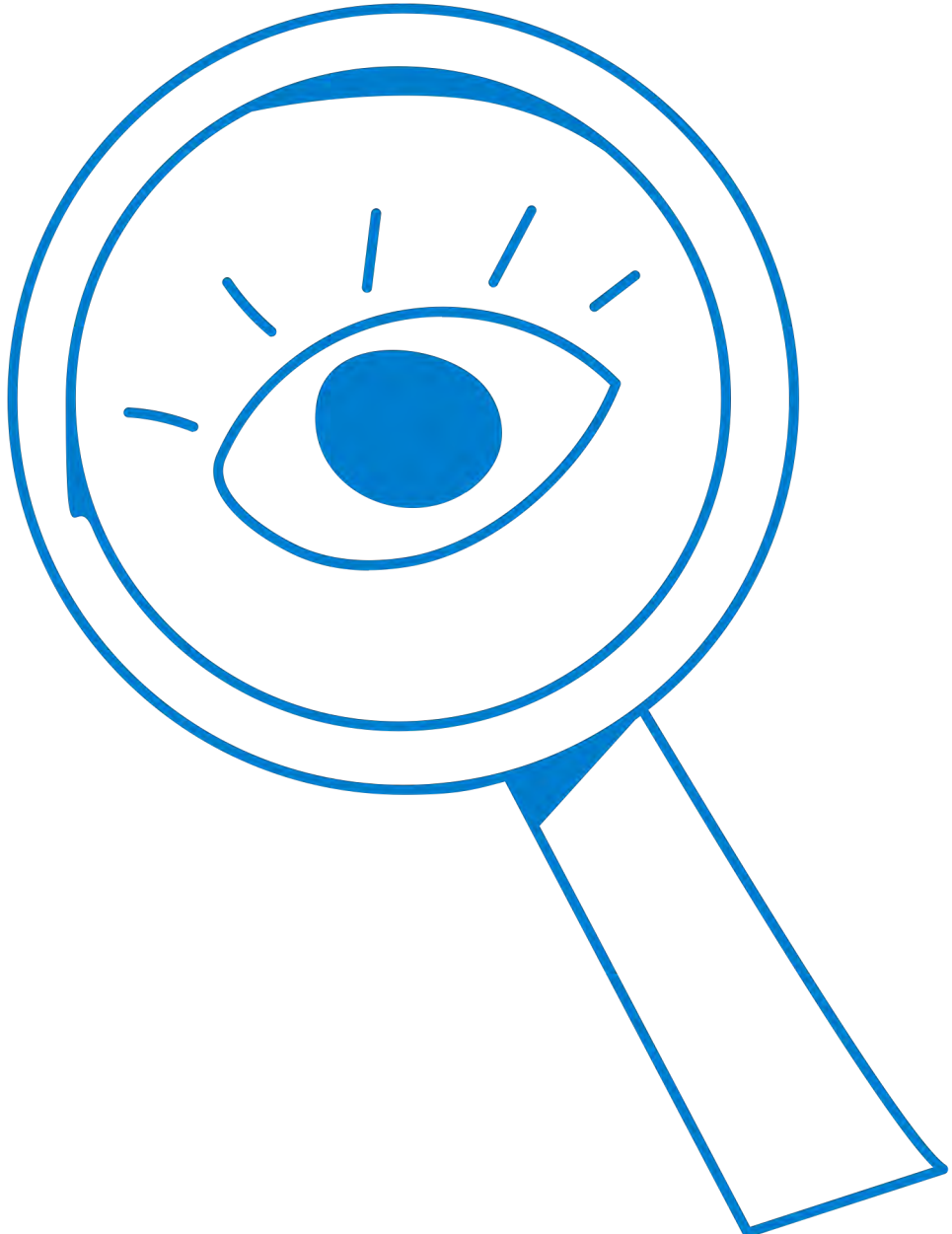
New programs are launched without market validation or brand positioning.

Technology Investments

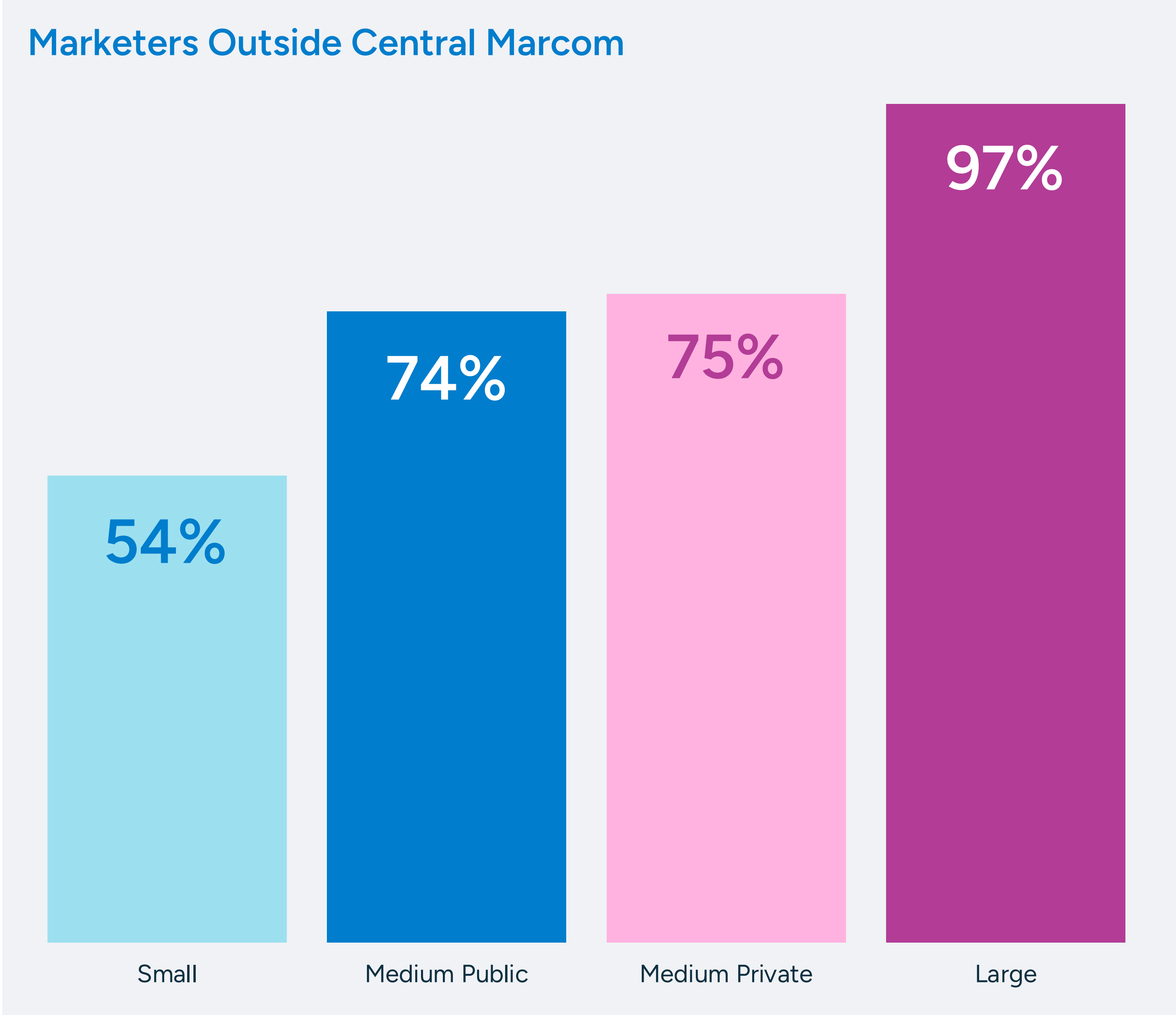
Tools are purchased without integration planning or change management.

Institutional Priorities

Strategic plans shift faster than operating systems.



The real budget story sits outside central marcom.

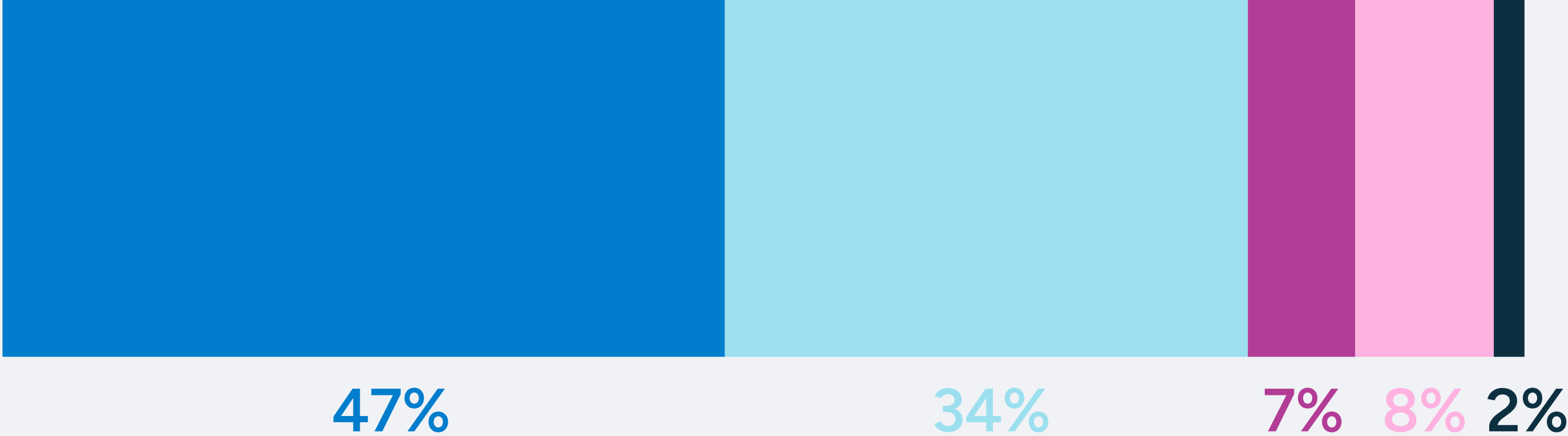


Most decentralized marketers don't have a dotted or direct line into Central Marcom.

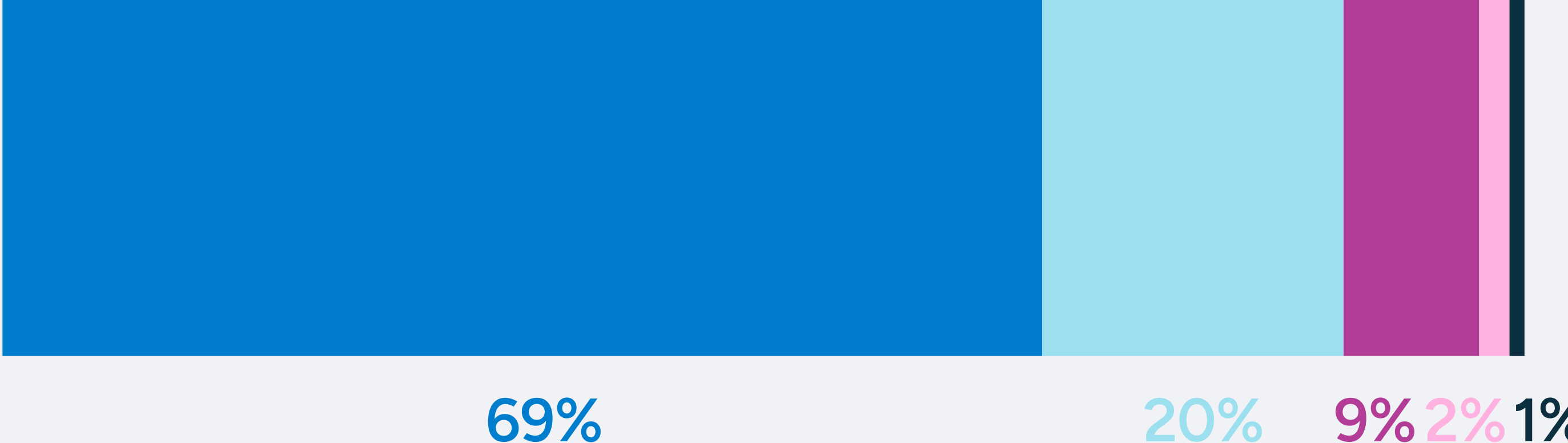
Embedded Marcom Professionals Reporting Relationship to Central Marcom

None Some Most All Don't Know

Dotted Line



Direct Line



Do reporting lines
actually *solve* alignment?

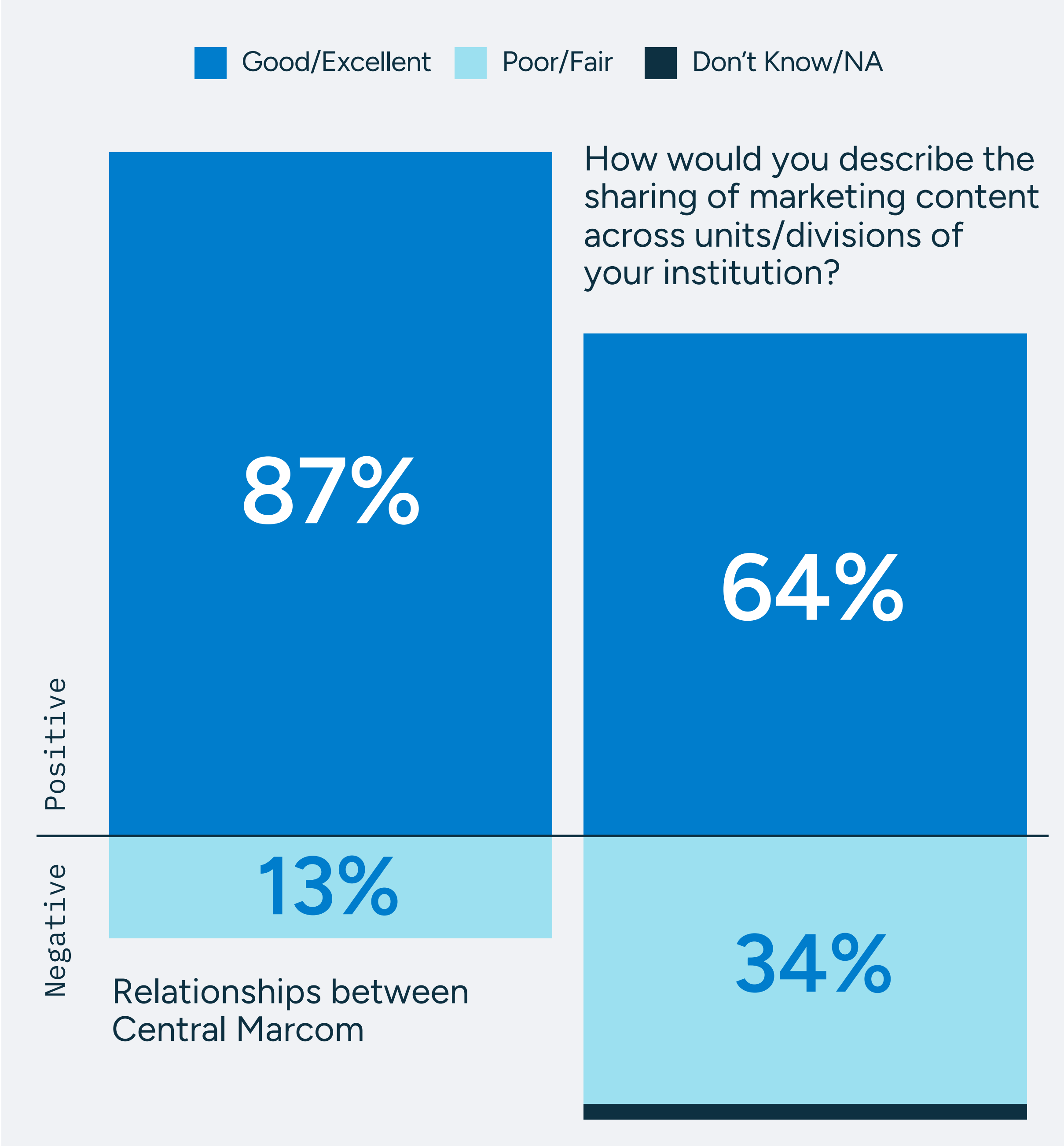
Reporting \neq integration

Dotted lines ≠ governance

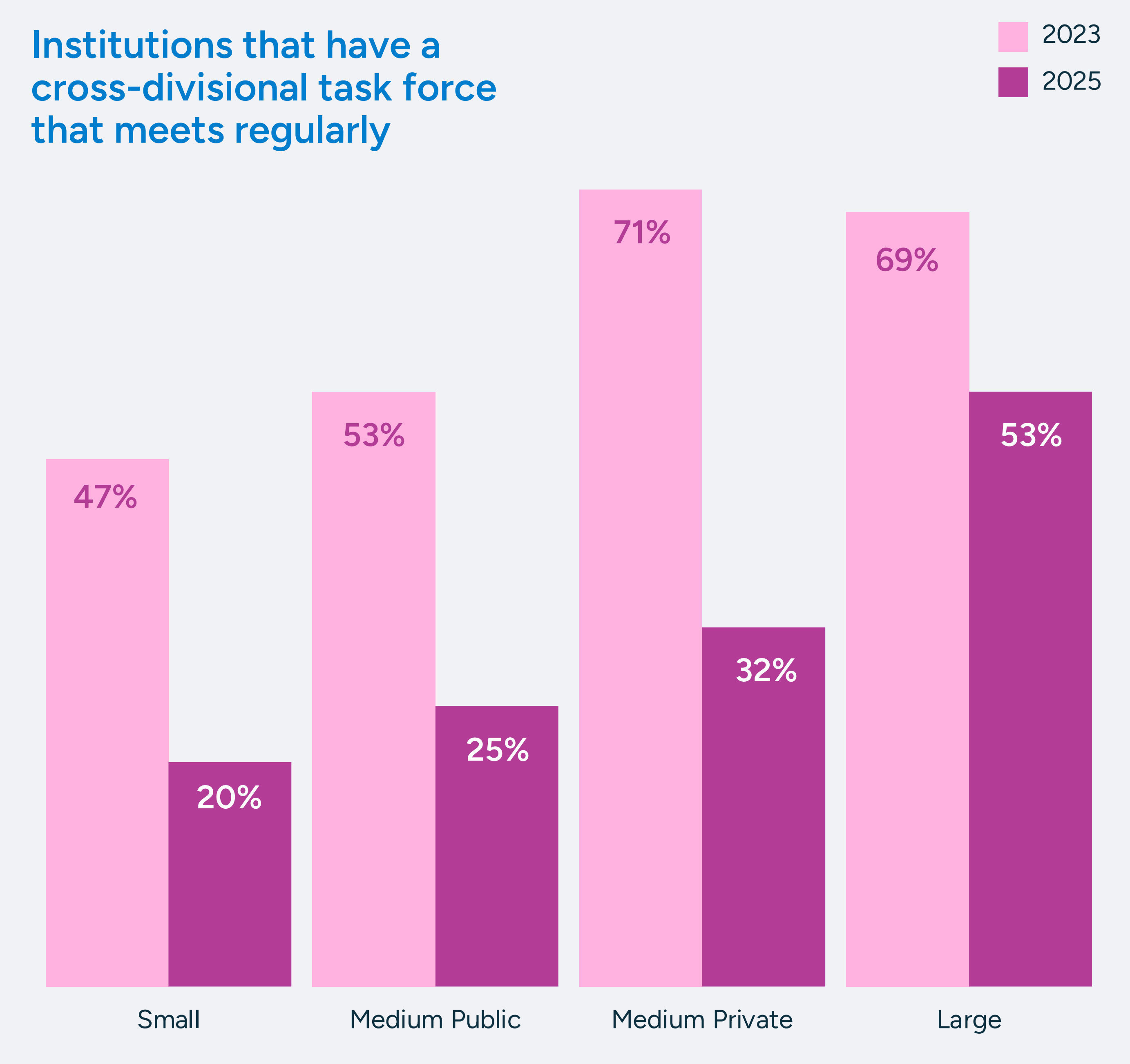
Alignment depends on
clarity, not proximity

Content sharing is a universal higher education problem. Regardless of size.

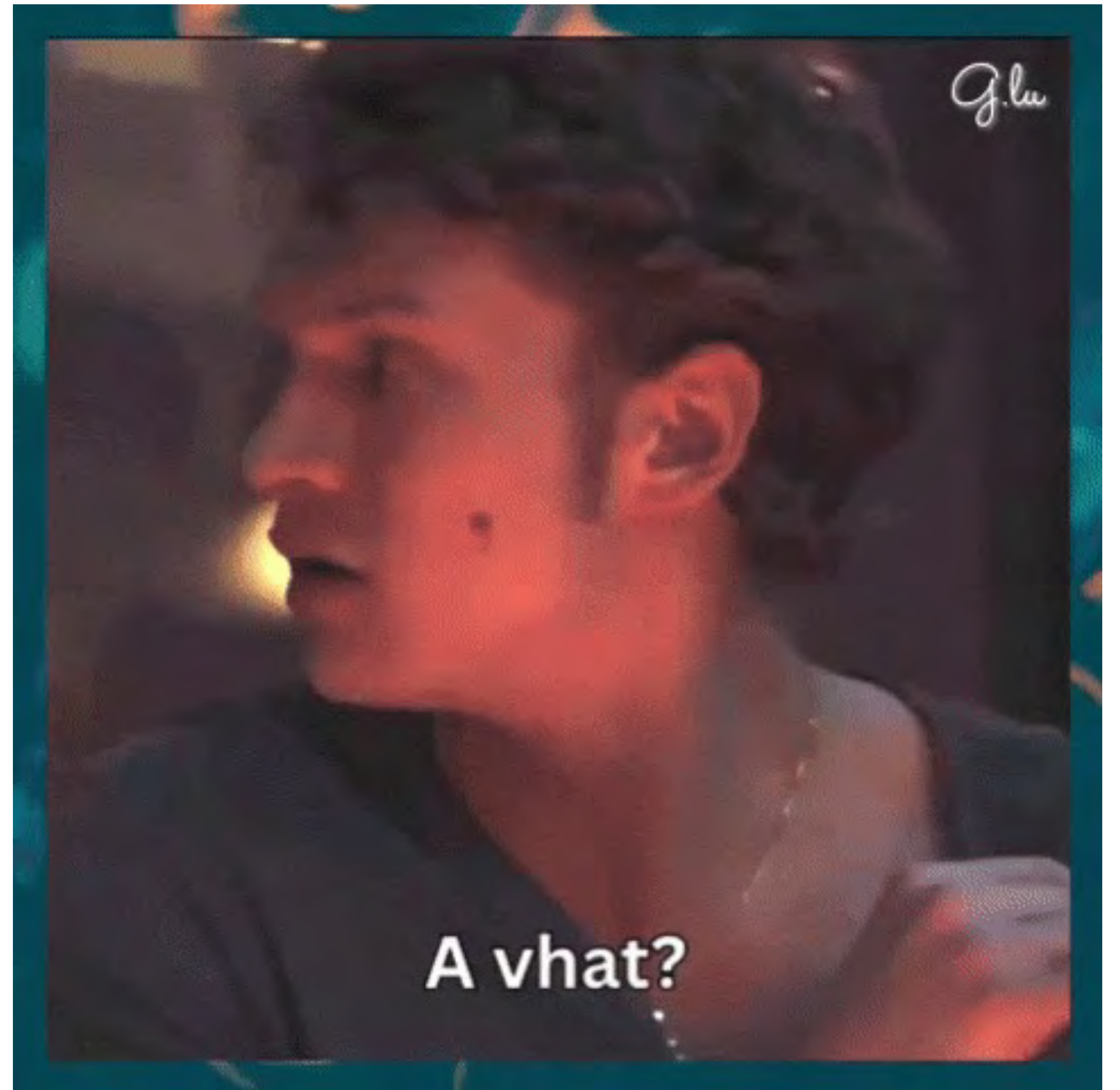
Even though **87%** say their relationship with non-central marketers is good or excellent, **34%** say content sharing is poor or fair.



Cross-Divisional Task Force



We have good relationships.
We just don't have shared organizational systems for *collaborative results.*



Why does alignment feel so hard for CMOs?



The High Performer Paradox



The Competence Trap

Organizations over-rely on what works in the short term, even when it undermines long-term effectiveness.



The Success Bias

When something works, we repeat it—without examining the cost.



Invisible Labor / Load

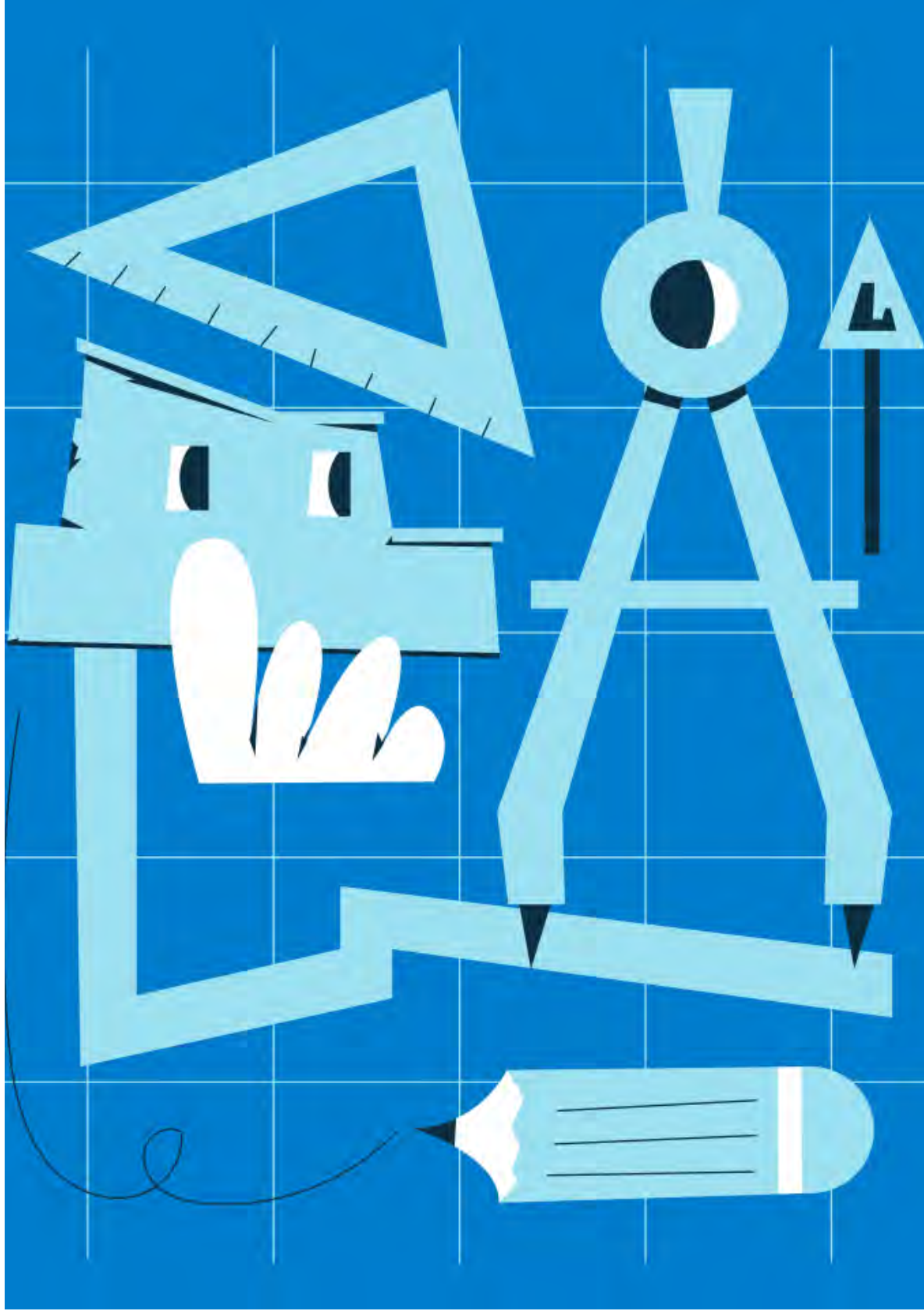
The most capable people do the most unrecognized system-holding work.



Goodhart's Law

When a measure becomes a target, it ceases to be a good measure.

Why the Alignment Gap Keeps Appearing



Organizational Discipline

Organizations over-rely on what works in the short term, even when it undermines long-term effectiveness.

Boundary Failure (Structural/Not Personal)

Formal boundaries of authority, ownership, decision rights, and accountability do not match the actual flow of work, power, or expectation.

High Capability in Low-Definition Systems

High performers will always compensate for weak systems.

Marketing as the Default Integrator

CMOs are some of the first noticers within the system.

But we also need
to talk about
Higher Ed Nice.



How Alignment Debt Undermines

- ➔ Inconsistent brand expression
- ➔ Slower adoption of enterprise initiatives
- ➔ And diminished return on investments in platforms, tools, and campaigns
- ➔ Burnout, poor performance, turnover



03 *A campus* story



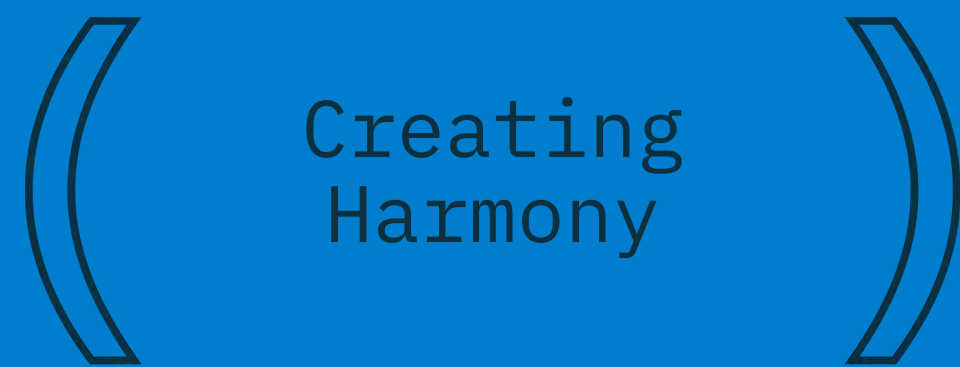
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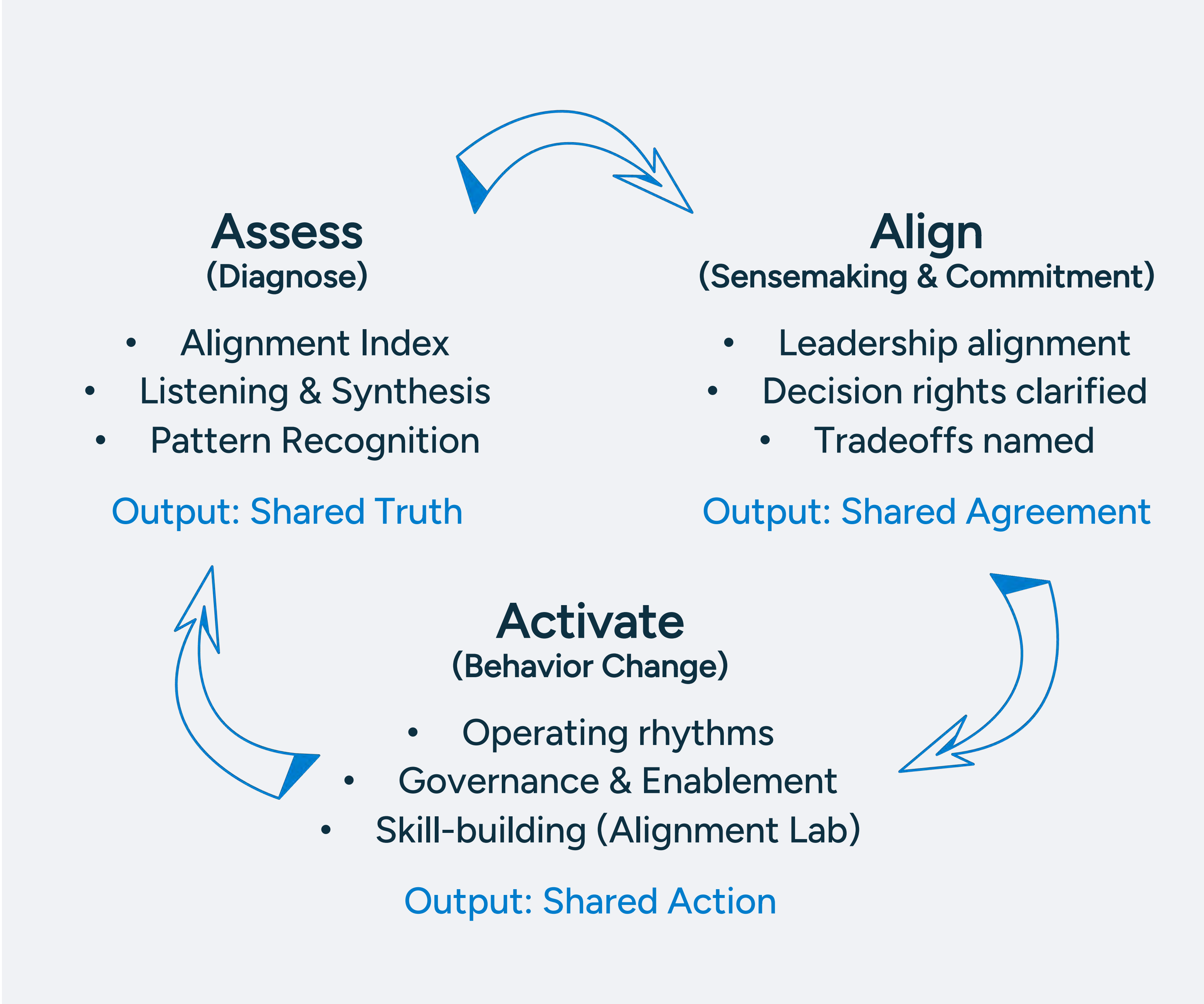


04 What *alignment* looks like

Turning decentralization into *harmony*.



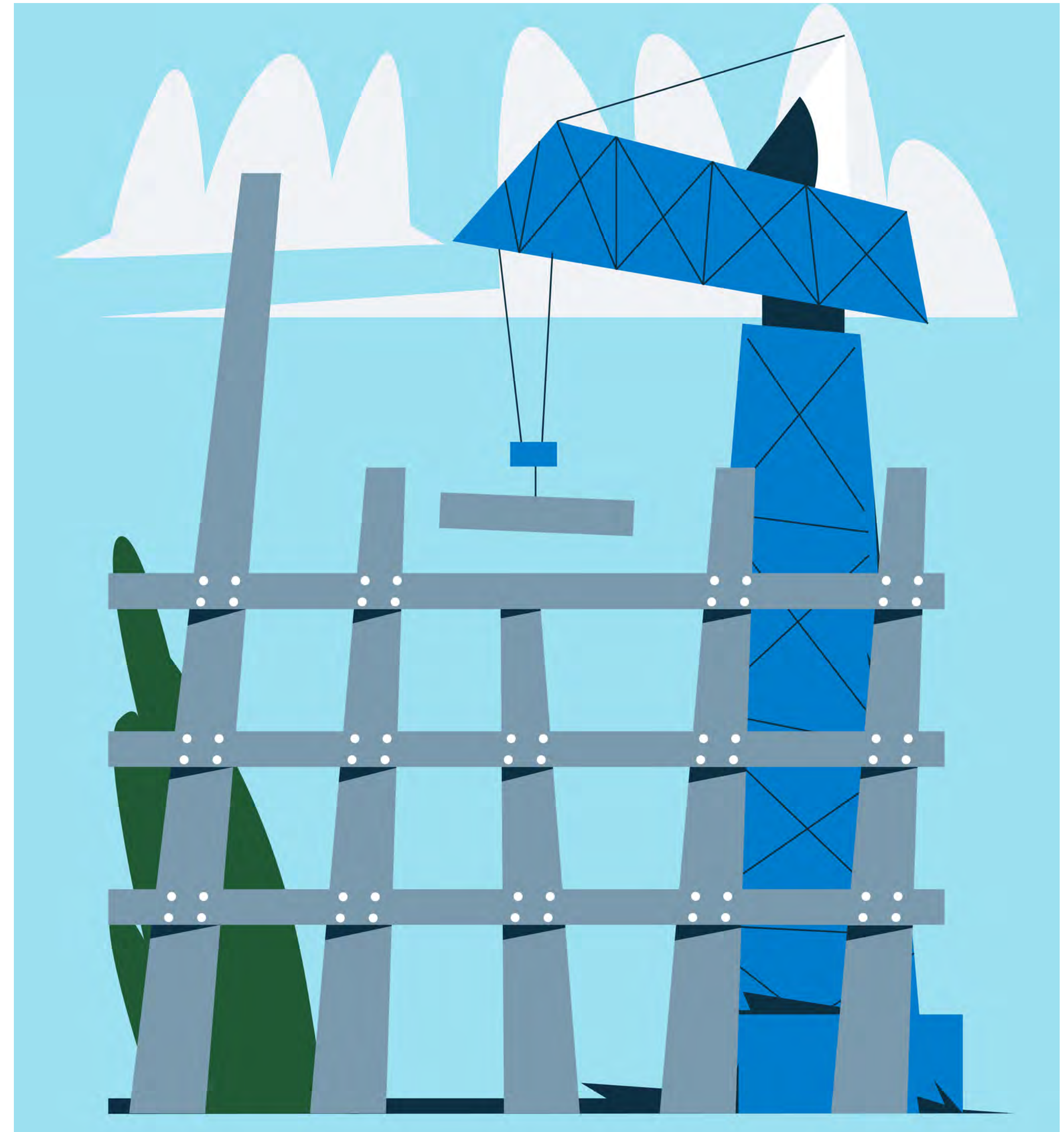
What does alignment look like?



Strategy over structure.
Every. Single. Time.

Alignment is when:

- Strategy is **clear**.
- Structure **supports** it.
- Leaders **reinforce** it.
- Culture **reflects** it.
- Experience **expresses** it.



The red flags to listen for:

"Are we still focused on that? I thought that **changed**."

"Who **owns** this?"

"Let's get **everyone's** input."

"That's not my **lane**."

"We're aligned **in principle**."

"I **assumed** you were handling that."

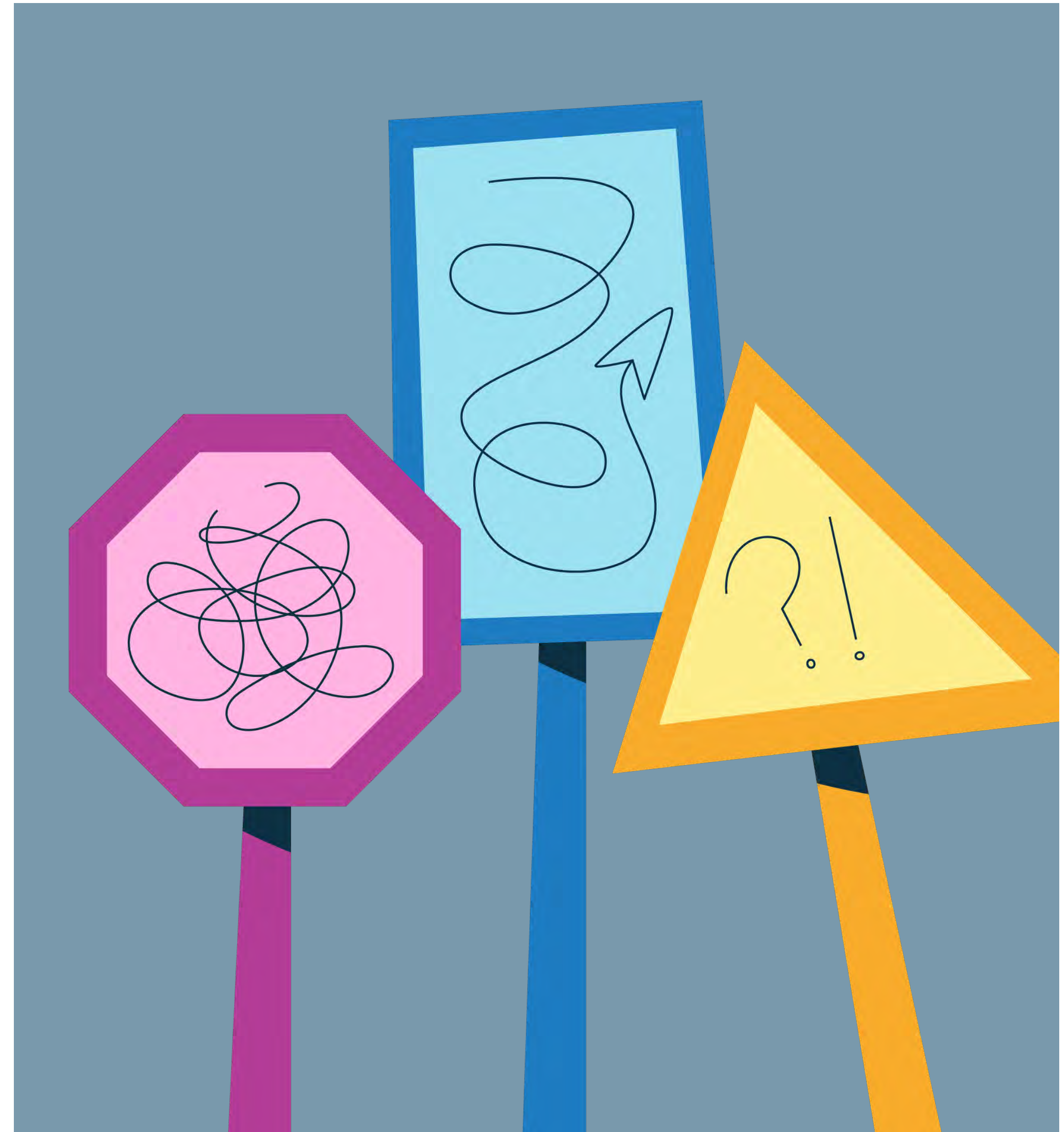
"That wasn't in my **job description**."

"We've always done it **this way**."



Malfunction Junction

- ➔ Name the intersection.
- ➔ Clarify one priority.
- ➔ Define one decision right.



The Shift:
From structural
control to human
alignment

**Alignment doesn't
come from control.**

**It comes from clarity,
confidence and
*shared understanding.***

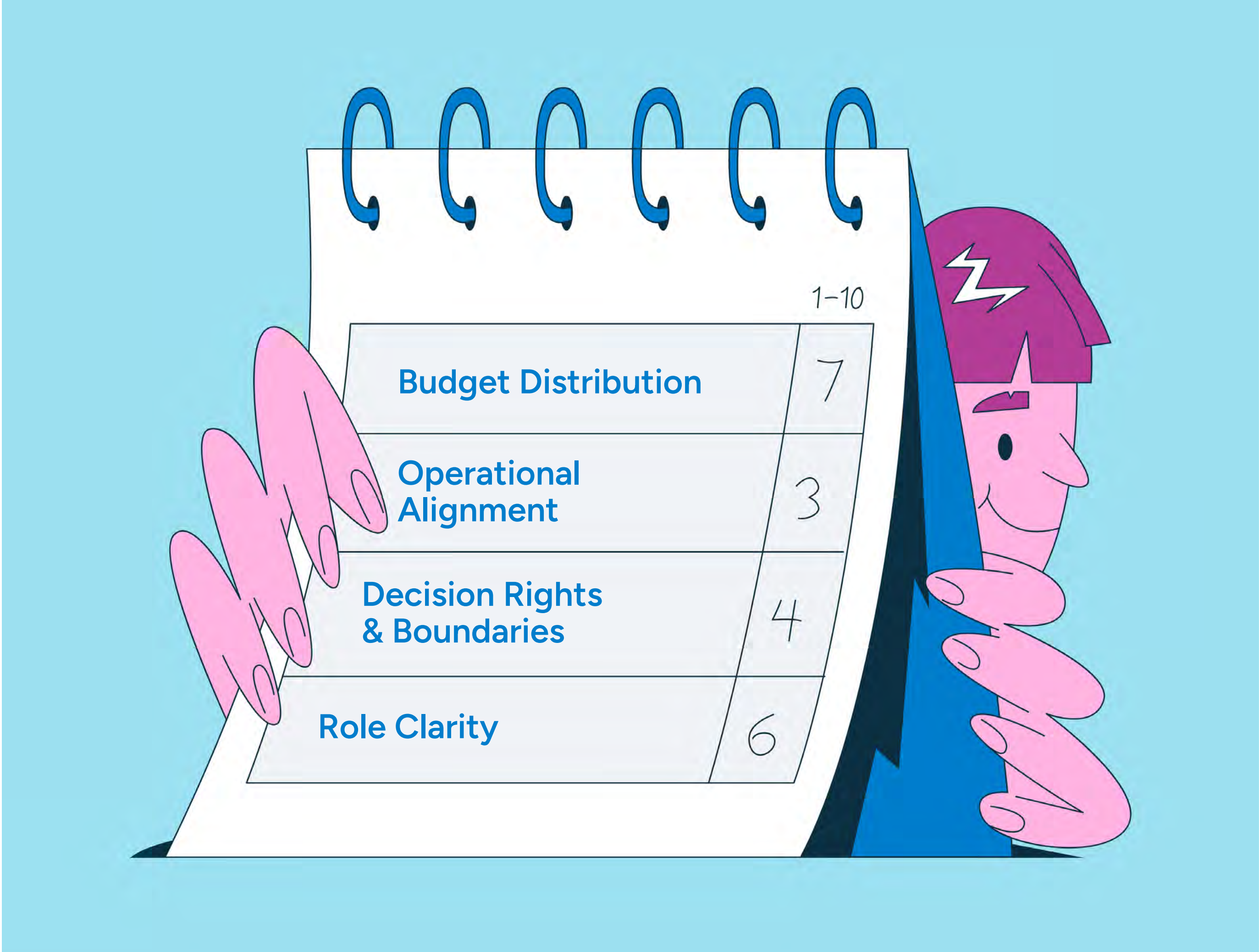


05 What's *next*?

How aligned is your institution, *really*?



Complete a short **3–5 minute survey** and receive a confidential score showing how aligned your institution is across organizational discipline, budget distribution, decision rights, and ways of working.



The Alignment Index serves as a structured diagnostic tool designed to quantify and surface the systemic conditions driving the Alignment Gap.

Simpson
Scarborough

GMOLAB

June 2-4, 2026

The Limelight
Boulder, CO



Early bird prices
extended to
March 9!



Read all of Chapter 1
now & sign up for
upcoming webinars



Ask us anything!



Murray Simpson
SVP Growth
SimpsonScarborough



Jenny Petty
VP Industry Relations & Advisory
SimpsonScarborough



Bill Campbell
VP of Operations & Communications.
Chatham University

Thank *you.*

SimpsonScarborough