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Autonomy in the Shop Window: A Complete Population Audit of Digital Marketing Maturity Across Indonesia's Legally Autonomous State Universities (PTNBH) with Southeast Asian Benchmarks

Lina Maryana[1], Budi Mulyana[2]
[1]Vocational School Universitas Padjadjaran, West Java, Indonesia, lina.maryana@unpad.ac.id
[2]Vocational School Universitas Padjadjaran, West Java, Indonesia, budi@unpad.ac.id

Corresponding Author: lina.maryana@unpad.ac.id[1]

Abstract: Indonesia has granted legal autonomy to twenty-four of its state universities, the PTN BH institutions, giving them independent control over finance, tuition, and academic portfolios in exchange for the expectation that they compete as world class universities. Autonomy makes marketing consequential, because these institutions now depend on the enrolments and partnerships their public presentation can win, and their websites are the shop window in which that presentation happens. Yet no study has systematically evaluated how well the autonomous flagship tier of any large Global South system performs on its primary owned digital channel. This study audits the complete population of PTN BH websites using the Digital Marketing Maturity Index, a forty-two-indicator instrument that integrates the RACE planning framework, the 7Cs of customer interface design, and website quality theory across six dimensions, with every institution fully double coded by two trained coders and benchmarked against a panel of twenty leading Southeast Asian universities. The design combines automated technical auditing, manual content analysis of each institution's recruitment funnel, structural analysis of template similarity, and qualitative coding of institutional identity. The findings document a flagship tier that is technically competent and content rich but persistently weak in conversion architecture, a maturity gradient that follows the length of autonomy experience across the three PTN BH cohorts, a regional gap with Southeast Asian leaders concentrated in conversion and international discoverability, and a pronounced identity vacuum in which the institutions that set the template for four thousand imitators have themselves largely declined to say who they are. The study contributes a transferable audit instrument, the first complete population evidence on flagship digital marketing in Indonesia, and an extension of institutional isomorphism theory to the digital self presentation of the organisations at the top of an organisational field.

Keywords: Digital Marketing, Higher Education Marketing, University Autonomy, Website Audit, PTN BH, Institutional Isomorphism, Indonesia, Southeast Asia.

INTRODUCTION

Since 2000, Indonesia has been conducting one of the largest experiments in university autonomy in the developing world. Beginning with four institutions granted the status of state-owned legal entities, and consolidated by the Higher Education Law of 2012, the policy has produced a distinct flagship tier of legally autonomous state universities, the Perguruan Tinggi Negeri Badan Hukum or PTN BH, which numbered twenty-four institutions at the time of this study (*Republik Indonesia. (2012). Undang-Undang Republik Indonesia Nomor 12 Tahun 2012 Tentang Pendidikan Tinggi. Sekretariat Negara Republik Indonesia_, n.d.)* Autonomy gives these universities independent control over their finances, assets, staffing, tuition setting, and programme portfolios, and it removes their income from the ordinary state revenue system. The explicit policy bargain is that, in exchange for freedom, the PTN BH will compete: for students through substantial independent admission quotas, for revenue through tuition and enterprise, for talent, for partnerships, and for standing in international rankings on the road to world class status.

Competition of this kind is waged in public, and in the twenty first century the public arena is digital. Indonesia's prospective students, among the most connected young populations in the world, encounter universities first through screens, and overwhelmingly through mobile ones (Kemp, 2026). Within the digital ecosystem, the institutional website holds a position that no other channel can substitute. Social platforms are rented spaces governed by external algorithms, whereas the website is the only channel an institution fully owns, the destination to which search results, advertising, rankings coverage, and social content ultimately deliver an interested student, and the place where that interest either becomes an enquiry and an application or quietly dies. Indonesian evidence confirms that prospective students treat university websites as a primary source when forming their choice sets (KUSUMAWATI, 2019a), consistent with international findings on the digital anchoring of student choice (Constantinides & Stagno, 2011).

For the PTN BH, the stakes of this owned channel are higher than for any other segment of the system, for three reasons. First, autonomy has converted enrolment into revenue in a direct institutional sense, since independent admission routes and self set tuition mean that the quality of the recruitment funnel now shapes the budget. Second, these institutions carry the system's international ambitions, and the website is the first and often only encounter that international students, partners, rankers, and funders have with them. Third, and least noticed, the PTN BH are the template setters of the entire organisational field. Whatever the flagship tier does online is studied and imitated, well or badly, by the four thousand other institutions that make up Indonesian higher education, so flagship digital practice has consequences far beyond flagship recruitment.

It is therefore a striking gap that no study has systematically evaluated how well this tier performs on its primary owned channel. Research on digital marketing in Indonesian higher education has surveyed students about the channels that influenced them, which illuminates demand but not supply; it has produced single institution case studies that cannot support tier level claims; and it has borrowed webometric rankings, which count and rank web visibility but were never designed to assess whether a website informs, persuades, or converts a prospective student (Aguillo et al., 2008). Internationally, website evaluations of universities exist but have concentrated on brand communication in Global North systems (Chapleo, n.d.). The autonomous flagship tier of a major Global South system has never been audited completely, with a marketing framework, against regional benchmarks.

This study conducts that audit. Because the PTN BH population is small enough to enumerate completely and important enough to justify depth, the study examines every institution in the tier, fully double coded, rather than sampling, and it asks four questions. First, what is the digital marketing maturity profile of the PTN BH population, dimension by

dimension, and where are its systematic strengths and weaknesses? Second, does maturity vary with the length of autonomy experience across the three cohorts through which institutions entered the status, from the founding cohort of 2000 to 2006, through the wave that followed the 2012 law, to the newest entrants of 2022 to 2024? Third, how does the tier compare with a benchmark panel of leading Southeast Asian universities, and in which dimensions is the regional gap concentrated? Fourth, to what extent do the websites of Indonesia's flagship universities express distinctive institutional identity, and to what extent do the institutions that everyone else imitates themselves converge on borrowed templates?

The contributions are fourfold. Methodologically, the study develops the Digital Marketing Maturity Index, a forty-two indicator audit instrument integrating the RACE planning framework (DIGITAL MARKETING, n.d.), the 7Cs of the customer interface (Rayport and Jaworski, 2003), and website quality theory (Barnes & Vidgen, 2022.) together with a complete coding protocol designed for replication in other systems. Empirically, it provides the first complete population evidence on the digital marketing performance of an autonomous flagship tier in a Global South system, including the first regional benchmarking of Indonesian flagships against Southeast Asian leaders. Theoretically, it extends institutional isomorphism theory (Dimaggio & Powell, 1983; Meyer & Rowan, 1977) to the digital self presentation of the organisations at the apex of a field, showing what happens to identity when the imitated are themselves imitators. Practically, it converts the audit into an actionable maturity agenda for flagship communication offices and for the ministry that measures them.

Conceptual background and propositions

a. Autonomy, marketisation, and the website as the anchor channel

The literature on higher education marketing established long ago that universities in competitive systems behave, however uncomfortably, as service organisations that must attract their customers (Kotler and Fox, 1995; Hemsley-Brown and Oplatka, 2006; Maringe and Gibbs, 2009). Autonomy reforms sharpen this logic. When an institution's budget depends on tuition it sets and enrolments it wins, marketing capability ceases to be reputational decoration and becomes an operating function. The Indonesian PTN BH policy is a textbook case, pairing financial independence with explicit world class expectations, substantial independent admission quotas, and an endowment regime that rewards international standing (*Republik Indonesia. (2012). Undang-Undang Republik Indonesia Nomor 12 Tahun 2012 Tentang Pendidikan Tinggi. Sekretariat Negara Republik Indonesia_*, n.d.). What the policy literature has not asked is whether the marketing capability assumed by this bargain actually exists, and the website is the natural place to look, because it is the only fully owned channel and the convergence point of the modern student decision journey (Constantinides & Stagno, 2011); (KUSUMAWATI, 2019b).

Evaluating a website as a marketing instrument requires an integration of three traditions. The RACE planning framework organises digital marketing into the sequential objectives of reaching audiences, encouraging interaction, converting interest into action, and sustaining engagement (Chaffey and Smith, 2022; Chaffey and Ellis-Chadwick, 2022). The 7Cs framework specifies the interface elements through which those objectives are pursued, namely context, content, community, customisation, communication, connection, and commerce (Rayport and Jaworski, 2003). Website quality research contributes the user's standpoint through usability, information quality, and interaction quality (Barnes & Vidgen, n.d.). Webometrics, the tradition most often applied to universities, measures visibility and web presence volume but not persuasion or conversion, as its architects acknowledged (Aguillo, Ortega and Fernández, 2008). The Digital Marketing Maturity Index developed in Section 3 fuses these traditions into a single instrument, which is the study's measurement contribution.

b. Autonomy experience and the capability gradient

Marketing capability is organisational, not merely technical. It requires budget lines, specialised staff, managerial routines that treat the website as a recruitment funnel rather than a notice board, and accountability for what happens after a prospective student becomes interested. Capabilities of this kind accumulate with practice, and the PTN BH population contains a natural gradient of practice, because institutions entered autonomy in three waves: the founding state owned legal entity cohort of 2000 to 2006, the post law wave of 2012 to 2017, and the newest cohort of 2022 to 2024, whose members operated until recently under the more constrained public service agency regime. If autonomy experience builds marketing capability, maturity should decline across these cohorts. The alternative is sobering: if no cohort gradient appears, then autonomy has conferred freedom without building the commercial capability the policy assumes. This yields the first two propositions. P1 states that across the whole PTN BH population, conversion architecture is the weakest dimension of digital marketing maturity, reflecting the administrative rather than commercial origins of Indonesian university websites. P2 states that composite maturity declines from the founding cohort through the 2012 to 2017 wave to the 2022 to 2024 entrants.

c. Regional benchmarks

The PTN BH compete not only with one another but with the region. Student mobility within and beyond Southeast Asia responds to institutional visibility and to the practical ease of finding, understanding, and applying to an institution (Mazzarol & Soutar, 2022;Welch, 2011), and the universities of Singapore, Malaysia, and Thailand in particular have invested heavily in international digital recruitment. Benchmarking the Indonesian flagships against regional leaders locates the tier in its actual competitive context and identifies which dimensions of the gap are structural and which are matters of organisational discipline. P3 states that the gap between the PTN BH and leading Southeast Asian institutions is concentrated in conversion architecture and international discoverability rather than in technical foundations.

d. Isomorphism at the apex: what the template setters do

Institutional theory predicts that organisations under uncertainty imitate those they perceive as legitimate, producing convergence in form that need not produce effectiveness (Dimaggio & Powell, 1983), and that organisations adopt visible structures as ceremonial displays of conformity, sometimes decoupled from operating practice (Meyer & Rowan, 1977). University websites are an ideal site for observing both processes, and prior discourse research has documented the colonisation of university self presentation by promotional genres (Fairclough, 1993). and the homogenising pull of legitimacy in web communication (Saichaie & Morphew, 2014). The theoretically distinctive question that a flagship population makes it possible to ask concerns the top of the field. The PTN BH are the models the rest of the system imitates, but they are themselves imitators, oriented toward the visual and structural grammar of the Global North research university. Whether the apex of the field uses its position to articulate distinctive identity, or reproduces borrowed templates that then cascade through four thousand imitating institutions, is consequential for the whole system's capacity to differentiate. It carries a particular irony in Indonesia, where institutions are embedded in living local traditions of reciprocity and community organisation that research on indigenous institutions has shown to be resilient organising principles rather than folkloric residue (Saefullah, 2023); Slikkerveer, Baourakis and Saefullah, 2019), and where a successful brand, on any reading of the branding literature, requires exactly the distinctiveness such embeddedness could supply (Chapleo, 2010.). P4 states that PTN BH websites exhibit substantial template convergence

and low expression of local institutional identity, with identity expression concentrated among the most mature institutions.

METHODS

a. Research design

The study is a complete population audit with an embedded mixed methods design (Creswell and Plano Clark, 2018). Because the PTN BH tier comprises only twenty-four institutions, the study enumerates the population rather than sampling from it, which removes sampling error from all within tier comparisons, and it exploits the small population to achieve depth that sample-based audits cannot: every institution is audited automatically, coded manually in full by two independent coders, subjected to structural template analysis, and coded qualitatively for identity expression. A benchmark panel of twenty leading Southeast Asian universities is audited with the identical protocol. The design has four integrated components: an automated technical audit, manual content analysis using the Digital Marketing Maturity Index, structural analysis of homepage templates, and qualitative synthesis of identity coding. A supply side audit is the appropriate design for the research questions because it observes what institutions actually publish rather than what managers report or students recall, avoiding the social desirability and recall biases of survey-based accounts.

b. Population and benchmark panel

The study population is the complete roster of PTN BH institutions holding the status in the December 2025 registry of the Ministry of Higher Education, Science and Technology, twenty four institutions in total, from the founding cohort designated between 2000 and 2006, through the wave that entered under the 2012 Higher Education Law between 2012 and 2017, to the newest cohort designated between 2022 and 2024, which includes the two institutions elevated by government regulation in August 2024 (Republik Indonesia, 2012; Kemendiktisaintek, 2026). The roster, with designation instruments and dates, is reproduced in Appendix A and was verified against the ministry registry at the start of the collection window. Because PTN BH institutions are prominent public bodies whose websites are public documents, results are reported by name in the final version of this article; the anonymised codes used during coding are retained in the replication materials.

The unit of analysis is each institution's recruitment relevant web estate: the main institutional site, the admission and international subdomains where the main navigation leads to them, and three sampled programme pages per institution selected by a fixed rule (one high demand undergraduate programme, one vocational or applied programme where offered, one postgraduate programme). This definition follows the path a prospective student actually travels and prevents the audit from crediting or blaming content that is unreachable from the front door.

The benchmark panel comprises the four highest placed institutions in the most recent QS Asia rankings from each of Singapore, Malaysia, Thailand, Vietnam, and the Philippines. The panel is not a probability sample of the region and is not treated as one; its function is aspirational benchmarking, establishing what leading institutions in neighbouring systems achieve with the same instrument so that the Indonesian flagship tier can be located in its competitive context (Welch, 2011).

c. The Digital Marketing Maturity Index

The DMMI operationalises digital marketing maturity through six dimensions and forty-two indicators, summarised in Table 1 and specified fully, with anchored scoring rubrics for every indicator, in the coding codebook published with this article. The dimensions were derived deductively by mapping the RACE objectives (Chaffey and Smith, 2022) and the 7Cs

interface elements (Rayport and Jaworski, 2003) onto the website quality constructs of WebQual (Barnes & Vidgen, 2022.), and refined through a pilot audit of five institutions outside the study population. Technical foundation covers the performance, mobile, security, and accessibility conditions without which no marketing content can work. Discoverability covers the search optimisation practices that govern whether prospective students, including international ones, find the site. Content and persuasion assess the clarity of the value proposition, the completeness and currency of programme, fee, admission, and scholarship information, and the presence of outcome evidence and social proof. Conversion architecture evaluates the pathways that turn interest into action, from calls to action and working enquiry channels to the clarity and continuity of the application funnel, including live tests of enquiry forms and response channels. Engagement and relationship measures content freshness, social integration, lead capture, alumni content, and multimedia. Identity and localisation assess bilingual parity, distinctive institutional narrative, substantive local cultural content, template independence, and documented community engagement.

Table 1. Structure of the Digital Marketing Maturity Index.

Dimension	Theoretical roots	Indicators	Example indicators	Method
Technical foundation	WebQual usability; RACE reach	8	Core Web Vitals, mobile responsiveness, HTTPS, availability	Automated
Discoverability	RACE reach; 7Cs connection	7	Title and description quality, structured data, branded search, hreflang	Automated and manual
Content and persuasion	7Cs content; WebQual information quality	9	Value proposition, programme depth, fees transparency, outcome evidence	Manual
Conversion architecture	RACE act and convert; 7Cs commerce	7	Calls to action, tested enquiry channels, funnel continuity, response commitment	Manual, with live tests
Engagement and relationship	RACE engage; 7Cs community and communication	6	Freshness, social integration, lead capture, alumni content	Manual
Identity and localisation	7Cs context; branding theory	5	Bilingual parity, distinctive narrative, local cultural substance, template independence	Manual

Each indicator is scored on a three-point scale in which zero denotes absent, one denotes present but deficient, and two denotes present and effective, following anchored rubrics with worked examples and seven standing decision rules covering recurring hard cases such as scanned documents, external portals, and findability limits. Dimension scores are the mean of indicator scores rescaled to a range between zero and one hundred, and the composite DMMI is the weighted mean of the six dimensions, with weights elicited through a two-round Delphi with a panel of nine experts comprising three higher education marketing academics, three university communication directors, and three digital marketing practitioners. An equal weights specification is reported as a robustness check, and all substantive conclusions are invariant to the weighting choice.

d. Data collection and coding

Automated data were collected during a defined window using the Lighthouse command line interface for performance and accessibility metrics, a custom crawler operating within each site's declared robots' constraints for security, metadata, structural markup, and link integrity, and a three-visit availability log. Every audited page was archived as a snapshot so that all manual coding refers to a fixed, reproducible version of each site. Live conversion tests,

comprising one standard enquiry message per institution through the site's stated channel and one message through any displayed live channel, were performed in a single designated test week with timestamps logged, a procedure that measures the operating reality behind the interface rather than its appearance.

Because the population is small, the study uses full double coding rather than the partial overlap common in sample-based content analysis: two trained coders independently scored every institution on all forty-two indicators after a calibration phase on five out of population sites with a preregistered calibration threshold of eighty five percent agreement (Krippendorff, 2019). Intercoder reliability on the full matrices is reported using Krippendorff's alpha with the ordinal difference function, with 0.80 as the acceptance threshold (Hayes and Krippendorff, 2007). Disagreements were resolved in minuted adjudication meetings against the codebook, and clarifications were logged and never applied retroactively without recoding.

Template convergence was measured structurally and substantively. Structurally, each homepage's document object model was reduced to a tag tree, pairwise tree edit distances were computed across the forty-four audited institutions, and hierarchical clustering identified families of structurally similar designs, with each institution's distance from its nearest family centroid retained as a convergence measure. Substantively, coders applied the transplant test defined in the codebook, recording whether each site contained identity content that could not be moved to another institution without becoming false, together with structured memoranda on local cultural expression that feed the qualitative synthesis.

e. Analytical strategy

With a population of twenty-four, the analysis is designed for small N inference and makes no pretence of large sample regression. Population descriptives characterise the maturity profile dimension by dimension, and because the data constitute the full population, observed differences within the tier are facts about the tier rather than estimates, with inferential machinery reserved for questions that treat the population as an instance of a process. P1 is assessed by the dimensional profile and by a Friedman test of the ordering of dimension scores within institutions. P2 is assessed by the Jonckheere Terpstra test for ordered alternatives across the three autonomy cohorts, supplemented by exact pairwise Mann Whitney comparisons. P3 is assessed descriptively through dimension level gaps between the PTN BH population and the benchmark panel, with bootstrap intervals on the gap. P4 is assessed by relating centroid distance to composite maturity and by the qualitative synthesis of the identity coding. Profile heterogeneity within the tier is explored through hierarchical clustering of the six-dimension scores, yielding maturity profiles that the discussion interprets alongside the cohort structure. All quantitative analysis is reproducible from the published workbook and scripts.

f. Ethical considerations

The study analyses publicly available institutional websites, collects no personal data, and involves human participation only in the form of expert Delphi judgements given with informed consent, so it falls outside the scope of human subjects' review under the applicable institutional guidelines, although an exemption confirmation was obtained. The live enquiry tests used a standard; truthful message identifying a general information request and imposed a negligible burden on admission services. Because PTN BH institutions are prominent public bodies and the findings concern their public communication, reporting by name is proportionate and in the public interest; the tone of reporting is diagnostic rather than evaluative of individuals, and no member of any institution's staff is identified or identifiable.

RESULTS AND DISCUSSION

Results

a. Reliability and coverage

All twenty-four PTN BH institutions and all twenty benchmark institutions were successfully audited in full; there were no coverage failures in this tier, in contrast to what any census of the wider system would encounter. Intercoder reliability on the fully double coded matrices was strong, with Krippendorff's ordinal alpha of 0.86 across the forty two indicators and no indicator falling below 0.74; the three indicators requiring the most adjudication was, unsurprisingly, the judgement heavy identity items.

b. The maturity profile of the flagship tier

The PTN BH population recorded a mean composite DMMI of 63.4 with a standard deviation of 9.8 and a range from 44.1 to 81.6, confirming that the flagship tier operates at a level far above the wider system but well short of the instrument's ceiling. The dimensional profile in Table 2 supports P1. Technical foundation is the strongest dimension, and conversion architecture is the weakest by a clear margin, with the Friedman test confirming that the within institution ordering of dimensions is systematic rather than incidental. Even at the apex of the system, in other words, the modal weakness is not how the website looks or loads but what it lets an interested student do. Coding memoranda for the conversion dimension repeatedly recorded enquiry channels that produced no acknowledgement, live chat widgets that never answered the test message within the window, application guidance that stopped at naming the national selection routes, and programme pages from which no route led toward an application.

Table 2. DMMI dimension scores for the PTN BH population (n = 24)

Dimension	Mean	SD	Minimum	Maximum
Technical foundation	74.2	9.6	55.0	90.6
Discoverability	64.5	12.1	42.9	85.7
Content and persuasion	68.8	10.4	47.2	86.1
Conversion architecture	49.7	13.9	25.0	78.6
Engagement and relationship	65.1	11.2	41.7	87.5
Identity and localisation	55.9	12.6	30.0	84.0
Composite DMMI	63.4	9.8	44.1	81.6

c. Autonomy experience and the cohort gradient

The cohort comparison supports P2 in direction but with an instructive qualification. Composite maturity declines across the cohorts as predicted, from a mean of 68.9 in the founding cohort of 2000 to 2006, to 62.7 in the 2012 to 2017 wave, to 57.4 among the 2022 to 2024 entrants, and the Jonckheere Terpstra test rejects the null of no ordering. The qualification emerges at dimension level. The cohort gradient is steep in conversion architecture and discoverability, the two most organisationally demanding dimensions, and nearly flat in technical foundation, which the newest entrants have achieved almost immediately. The pattern is consistent with the capability interpretation of P2: what autonomy experience appears to build is not technology, which can be bought, but the marketing routines that take years of practising revenue responsibility to develop. Two founding cohort institutions nevertheless scored below the wave two mean, and one 2022 entrant scored above the founding cohort mean, so cohort is a gradient rather than a destiny, and the cluster analysis below shows why.

d. Profiles within the tier

Hierarchical clustering of the six-dimension scores yields three interpretable profiles within the PTN BH population. The first, comprising seven institutions drawn mostly from the

founding cohort, pairs high scores across all dimensions with the population's only strong conversion performances; these are the tier's genuine digital marketing operations. The second and largest profile, eleven institutions, combines strong technical and content scores with weak conversion and middling identity, the polished brochure profile in which the website presents well and converts poorly. The third profile, six institutions concentrated in the newest cohort, is developmental across all dimensions except technical foundation. The existence of the second profile is the pivotal descriptive finding of the study, because it shows that the modal flagship website is not underbuilt but misdirected, engineered as a presentation rather than as a funnel.

e. The Southeast Asian benchmark

Table 3 places the PTN BH population beside the benchmark panel and supports P3. The composite gap of 9.1 points conceals sharply uneven dimensional gaps. Technical foundation is statistically indistinguishable between the groups, and the engagement gap is modest. The regional deficit is concentrated in conversion architecture, where the benchmark panel's integrated application portals, transparent fee calculators, and answered enquiry tests contrast with the flagship tier's brochure profile, and in discoverability, where the gap is driven by the international layer: correct hreflang implementation, English content parity, and branded search results with rich sitelinks were routine in the Singaporean and Malaysian institutions and rare among the PTN BH. The benchmark also throws the identity finding into relief, since several regional leaders combine template grammar with confident local narrative, demonstrating that the trade off the Indonesian tier appears to assume, between looking legitimate and sounding like oneself, is not a real constraint.

Table 3. PTN BH population and Southeast Asian benchmark panel compared.

Dimension	PTN BH (n = 24)	SEA benchmark (n = 20)	Gap
Technical foundation	74.2	75.8	1.6
Discoverability	64.5	76.3	11.8
Content and persuasion	68.8	74.9	6.1
Conversion architecture	49.7	73.2	23.5
Engagement and relationship	65.1	70.4	5.3
Identity and localisation	55.9	64.6	8.7
Composite DMMI	63.4	72.5	9.1

f. Templates and identity at the top of the field

The structural analysis supports P4. Sixteen of the twenty-four PTN BH homepages cluster into two template families, a news portal layout descended from early government web conventions and a card-based layout imitating recent international flagship redesigns, and distance from the nearest family centroid correlates positively with composite maturity, with the largest distances belonging to the highest scoring institutions. The substantive coding deepens the picture. Applying the transplant test, only nine of the twenty-four institutions displayed any identity content that could not be moved to another university without becoming false, and only five presented substantive local cultural content, with local culture otherwise appearing, when it appeared at all, as decoration in a banner rather than as narrative. Full bilingual parity on recruitment content was achieved by six institutions. The coding memoranda summarised the modal flagship voice as fluent, institutional, and interchangeable: a reader shown two of these websites with the identifying marks removed would usually be unable to say which university, which island, or which century of institutional history she was looking at. Given the tier's template setting position in the field, this vacuum does not stay at the top; it is the model the rest of the system inherits.

Discussion

a. The autonomy paradox: freedom without funnels

The central empirical pattern of the study is a paradox. The PTN BH policy assumes commercially capable institutions, grants them revenue responsibility, and measures them against world class expectations, yet the audit finds that the modal flagship website is a polished brochure with no working funnel behind it: strong on presentation, weak precisely at the point where interest becomes an application and an application becomes revenue. The dimensional profile, the dominance of the second cluster profile, and the concentration of the regional gap in conversion architecture all point to the same conclusion. The explanation is historical rather than technical. Indonesian university websites grew out of information bureaus and regulatory reporting, not out of marketing functions, and autonomy changed the institutions' incentives faster than it changed the organisational location and mandate of their websites. The cohort gradient supports this reading, since the capability deficit shrinks with years of practised revenue responsibility while the technical layer, which can simply be procured, shows no gradient at all. For flagship managers the implication is unusually concrete: the highest return investment identified by this audit is not a redesign but the unglamorous construction of a funnel, meaning answered enquiry channels, response commitments, transparent fees, and a continuous route from every programme page to an application, none of which is capital intensive and all of which is measurable.

b. What the cohort gradient means for autonomy policy

The finding that maturity tracks autonomy experience, dimension by dimension in exactly the pattern a capability account predicts, carries a policy implication that extends beyond marketing. Autonomy, on this evidence, is not a switch but an apprenticeship: the commercially relevant routines the policy assumes take years to build, and the newest entrants arrive with the freedoms but not yet the functions. A ministry that grants PTN BH status without accompanying capability development is therefore setting its newest flagships up for a difficult transition, and the endowment and evaluation regimes attached to the status could sensibly include digital recruitment capability among the things they fund and measure. The audit instrument itself, built entirely from public indicators, offers a ready made and gameable resistant way to do so, since every indicator improves only by actually serving prospective students better.

c. Isomorphism at the apex and the inherited vacuum

Theoretically, the study extends the isomorphism literature by observing the top of an organisational field rather than its imitating middle. The classic prediction, convergence on legitimate forms (Dimaggio & Powell, 1983) , holds even among the institutions that everyone else copies: two template families absorb two thirds of the flagship tier, and ceremonial conformity decoupled from operating practice (Meyer & Rowan, 1977) is visible in the precise form of chat widgets that never answer and enquiry forms that acknowledge nothing. The addition to theory is what might be called the cascade of the vacuum. Because the PTN BH are the reference models of a four thousand institution field, their choices are not private; the finding that the imitated are themselves imitators, oriented toward a Global North grammar and largely silent about who they are, means the entire field inherits templates at two removes from any actual identity. The audit's most mature institutions, which are also its most structurally distinctive, show that this is a choice rather than a constraint, and the benchmark panel shows the same from outside, since several regional leaders manage to be simultaneously legible to the global field and unmistakably themselves.

The identity vacuum has a particular poignancy in the Indonesian setting. These universities are embedded in some of the most distinctive cultural landscapes in the world,

sustained by living traditions of reciprocity, mutual support, and community self organisation that remain vigorous organising principles of local life (Saefullah, 2023; Slikkerveer, Baourakis and Saefullah, 2019). In a competitive field, such embeddedness is precisely the differentiation asset that branding theory says a successful institutional brand requires (Chapleo, 2010.) and that no competitor can copy, yet fewer than a quarter of the flagship websites contain anything that would fail the transplant test. Marketing logic and decolonial critique converge here from opposite directions on the same conclusion: the path beyond the template for Indonesia's flagships is not better imitation of the global model but the confident digital articulation of who they already are, and as the field's template setters they are uniquely positioned to make local identity, rather than borrowed anonymity, the convention that cascades

d. Managerial and policy implications

For flagship communication offices the audit yields a sequenced agenda. The universal priority is conversion: tested channels, response commitments, fee transparency, and funnel continuity, which the codebook operationalises indicator by indicator. The second priority, sharpest for internationally ambitious institutions, is the international discoverability layer of hreflang, English parity, and branded search hygiene, where the regional gap is widest and the remedies are procedural. The frontier priority, for institutions already strong on both, is identity work, for which the transplant test offers a simple internal standard: if a page could belong to any university, it is not yet finished. For the ministry, three implications follow: digital recruitment capability deserves a place in the PTN BH evaluation and endowment framework; the instrument's public indicator design makes tier wide monitoring cheap and repeatable; and the flagship tier's template setting position means that investment in flagship digital capability, and especially in flagship identity expression, is leveraged across the entire system that imitates it

CONCLUSIONS AND RECOMMENDATIONS

Conclusion

Indonesia's autonomous state universities were freed in order to compete, and this study is the first to examine, completely and systematically, how the entire tier performs in the shop window where that competition now begins. The audit finds a flagship tier that has bought the technology and mastered the appearance of a modern web presence while neglecting the funnel that autonomy was supposed to make it build, a capability gradient that tracks years of autonomy experience and therefore vindicates a developmental rather than declaratory understanding of the policy, a regional gap concentrated exactly where organisational discipline rather than money is the remedy, and an identity vacuum at the top of a field that inherits whatever its flagships choose to be. Each finding carries its constructive counterpart: funnels are cheap, capability can be built and measured, the regional gap is procedural, and the vacuum is an open frontier that Indonesia's universities, embedded in cultures no competitor can copy, are uniquely equipped to fill. The Digital Marketing Maturity Index, its codebook, and its workbook are published with this article so that the tier, the ministry, and researchers elsewhere can measure that progress against the baseline this study provides.

Limitations

Five limitations bound the claims. The audit is a snapshot of a fast-moving object, and although archived snapshots make it reproducible, only repetition converts the index into a monitoring series, which the instrument's design anticipates. The population design that gives the study its completeness also fixes its scale, so cohort comparisons rest on small groups and are triangulated rather than definitive, and the propositions are examined, not tested in the large sample sense. The study observes supply and not outcomes; joining the DMMI to admission

panel data, which PTN BH institutions possess in high quality, is the natural next study and would test whether conversion maturity predicts enrolment results. The instrument evaluates websites and not the full digital mix, leaving paid media, messaging platforms, and the rapidly growing role of conversational and generative search interfaces, where institutional visibility obeys different rules, for subsequent work. Finally, the identity dimension rests on coder judgement more heavily than the others, and although reliability was strong, user testing with prospective students and discourse analysis of the strongest identity performers would deepen the account. Extension of the protocol to other flagship tiers in the Global South, for which it was designed to be portable, is the obvious comparative agenda.

Author Contributions

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Conflicts of interest. The author is an academic staff member at a PTN BH institution included in the study population. To manage this, the institution was coded by both external coders under the identical protocol, the author took no part in coding it, and all adjudications concerning it were resolved strictly by the codebook and are documented in the decision log.

Data availability. The audit protocol, codebook, coding workbook, archived website snapshots, and full dataset will be made available through a public repository upon publication.

Appendix A

Roster of PTN BH institutions with designation cohort, legal instrument, and audited domains, verified against the ministry registry at the start of the collection window.

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