

EMERGING RECRUITING MARKETS

Strategic Engagement Options

UI 2011 Conference

DISCLAIMER

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Relationship-based Tools

Leverage-based Tools

Return on Investment Tools

Academic Branding Tools

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HOUSEKEEPING

- The presentation is geared to run for about 30 minutes.
- About 15 minutes are allocated for discussion.
- A PDF version of this presentation will be made available to the Ministry or can be downloaded at www.icg.ac on the homepage (December 2011).

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OVERVIEW

Summary of Recruitment Tools (I)

- **Marketing tools**
 - Online Marketing Tools
 - Branded media and IT tools
- **Relationship-based tools**
 - Institutional linkages
 - Personal networks
- **Leverage-based tools**
 - External visits
 - In-country presence
- **Return on investment tools**
 - Financial packaging
 - Placements
- **Academic branding tools**
 - Rankings
 - Thought leadership

OVERVIEW

Summary of Recruitment Tools (II)

- **Marketing tools can extend an institution's reach beyond brochures, campus visits and college fairs, to make information both dynamic and accessible anytime, anywhere.**
- **Relationship-based tools signal, channel, condition, enable, and support potential and actual applicants.**
- **Leverage-based tools typically aim for the most effective quantitative or qualitative information dissemination.**
- **Return on investment tools are a powerful recruiting tool and in many instances (in aggregate) are a deciding enrollment factor.**
- **Academic branding tools, based on an institution's public, contextual, and commonly accepted standing as a teaching and/or research institution, possess a definite authority in recruiting terms.**

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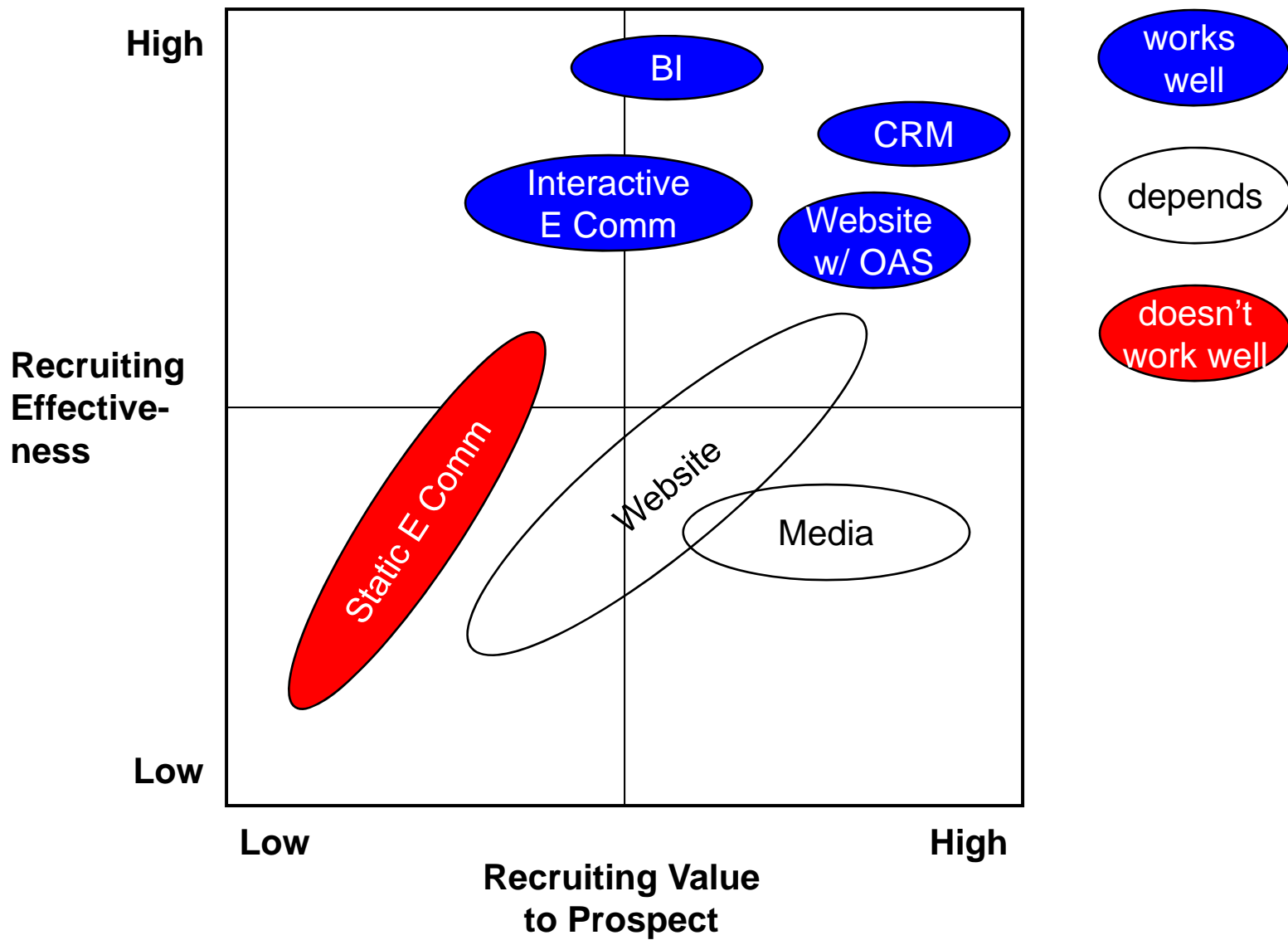
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MARKETING TOOLS



MARKETING TOOLS

Online Marketing Tools (I)

- **Social Media**

- The use of social media (Facebook, LinkedIn, Twitter, etc.) is producing a fundamental shift in the recruiting relationship between institutions and candidates.
- Social media provide candidates the power to engage and converse with an institution, and space to connect with individuals with similar experiences or interests.
- Unlike in the past, conversations of potential candidates take place largely outside the control of a given institution.

- **User-generated Content**

- The advent of user-generated content (discussion boards, forums) has created a major shift in the way individuals receive and distribute information.
- Information and advice that was previously difficult to obtain is now easily within reach.
- This informal communication impacts the decision-making process of international students.

Online platforms lead to a multi-flow engagement process

MARKETING TOOLS

Online Marketing Tools (II)

- **Websites**
 - An institution's website typically serves as the single most accessed source of information by prospective applicants.
 - The more clear, comprehensive, and integrated applicant and admission relevant information is the more effectively a website will address the information-to-application process.
 - From a procedural standpoint websites serve as a front-loading information tool that conditions subsequent information exchanges and thus has a significant impact on communication cost structures for an institution.
- **Website with an Online Application System (OAS)**
 - A fully integrated online application system provides applicants with a high value proposition.
 - It ensures procedural integrity.
 - It allows for specific and manageable interaction.
 - It offers other benefits, such as fully automated generation of admissions certificates or integration into institutional services (housing/health care).

Still, top-down online marketing tools are still a key recruitment tool

MARKETING TOOLS

Branded Media, and IT Tools

- **Branded Media Outlets**

- **Branded media outlets (TV, newspapers and magazines, radio, internet portals such as Yahoo!) from a potential student's perspective serve as independent and trusted information sources; for an institution they operate as information multipliers.**
- **Coverage in media outlets takes on a supporting role by amplifying mostly existing positioning.**
- **Its effectiveness is limited by the one-off nature of coverage and the lack of control over content and direction of coverage.**

- **IT Tools**

- **Customer Relationship Management (CRM) and Business intelligence (BI) software tools serve as indirect recruiting tools.**
- **From a procedural perspective they work best when employed as data integration, tracking, evaluation, and modeling tools.**
- **Their success fundamentally depends on a well implemented digital information landscape.**

Top-down marketing tools are a reliable source of information

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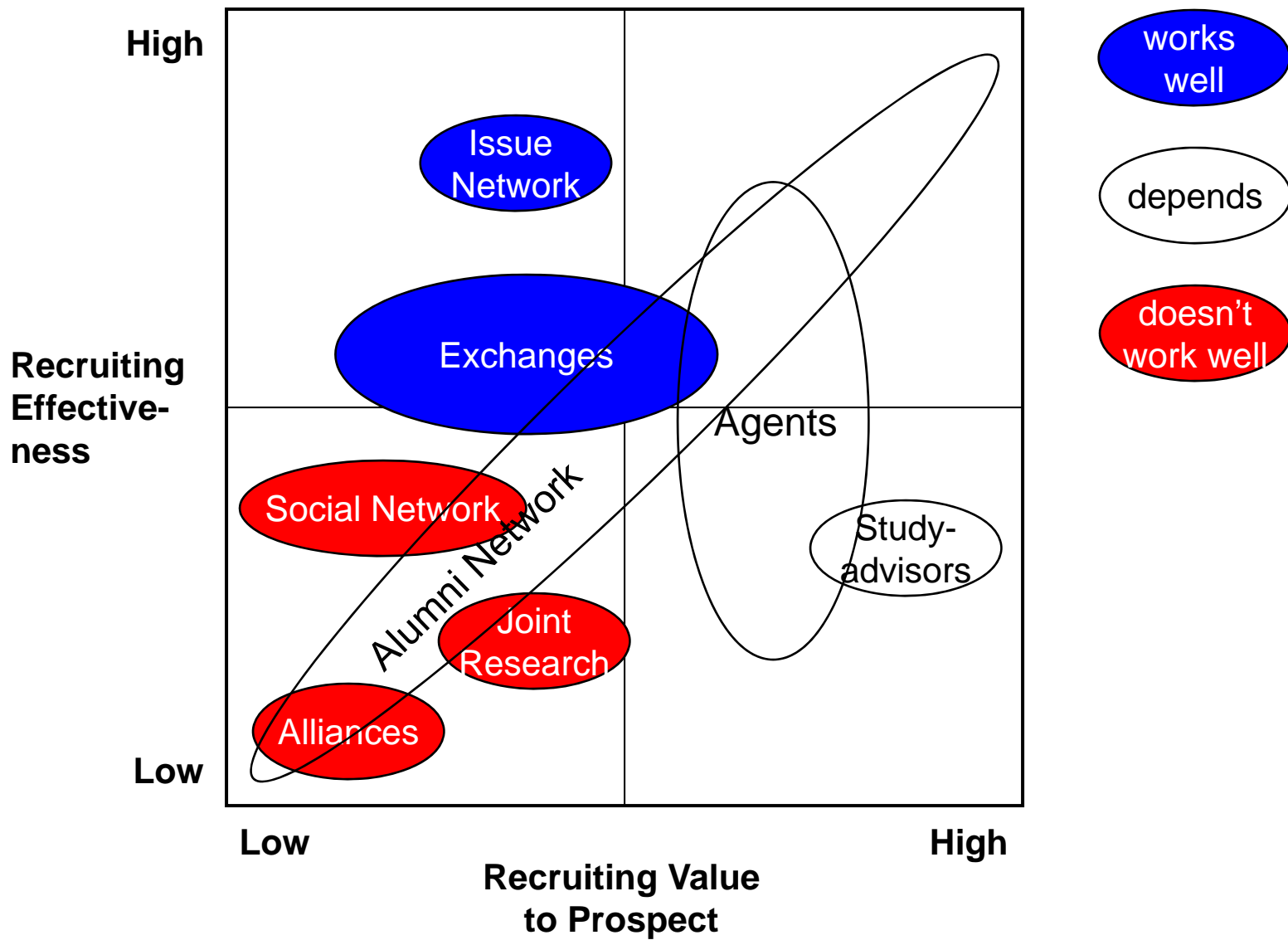
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RELATIONSHIP-BASED APPROACHES



RELATIONSHIP-BASED TOOLS

Institutional Linkages (I)

- **Alliances**
 - Alliances cover a wide spectrum of cooperation scenarios, ranging from deep institution-to-institution alliances to broad groupings.
 - Alliances typically do not serve as a recruiting tool per se but add to an institution's contextual brand position (exception is CALDO in Canada).
 - Some alliances offer exchange-based mobility as a component of their overall mission (Universitas21), while groupings such as the Australian-European Network (AEN) are set up as exchange networks.
- **Joint Research**
 - Joint research initiatives stretch across a broad range of depth, ranging from informal and ad hoc faculty-driven activities to deep, formalized, and public initiatives such as joint (post-graduate) degrees.
 - As a recruiting tool, these initiatives tend to yield only indirect and highly specific value.
 - They are most attractive to post-graduate and doctoral students with dedicated research interests.

Formal institutional linkages enhance academic branding

RELATIONSHIP-BASED TOOLS

Institutional Linkages (II)

- **Pathway Models**

- Pathways are a formal agreement between feeder and receiver institutions.
- Pathway models include foundation programs, diplomas with intensive language preparation, bridging programs, secondary school academic pathways, entry through transnational partners and programs, etc.
- Pathways are emerging as a key recruiting tool for Emerging Markets students.

- **Exchanges**

- Exchanges are a widely used international student recruiting tool in Europe and North America (e.g. Erasmus).
- While in the past the vast majority of exchanges had been based on reciprocity and fee waiver models, many more recent exchange models are based on highly differentiated economic models and at times unidirectional student flows.

Formal institutional linkages boost student inflows

RELATIONSHIP-BASED TOOLS

Personal Networks (I)

- **Alumni Networks**
 - Alumni networks serve as informal (e.g. individualized question and answer service) as well as formal information repositories (e.g. events aimed at prospective applicants, institution-guided collateral production).
 - Alumni networks can support international recruiting operations with logistical assistance (e.g. arrangement of facilities).
 - Alumni networks can actively scout talent (e.g. presentations in local secondary schools).
 - Alumni networks can take up procedural roles (e.g. the interviewing of applicants and the lobbying of parents).
- **Agents and Study Advisors**
 - Agents potentially offer a number of strong value propositions to institutions, including local expertise, time-to-market, capacity, and cost advantages.
 - A variation on agents, study advisors operate on a less leveraged scale while trying to focus on more individualized counseling.

Personal networks can be a decision-making factor

RELATIONSHIP-BASED TOOLS

Personal Networks (II)

- **Issue Networks**

- Issue networks are highly varied and many are finite in their duration, though others have turned into stable organizations.
- They may have close relationships into universities but often not on an administrative but instead research-oriented or general level.
- Examples are Greenpeace or the World Wildlife Foundation.
- These issue networks have a highly specific, indirect recruiting effect by virtue of being connected to institutions.
- They can have a strong effect on prospective students who associate themselves with a specific (research) issue.

- **Social Networks**

- Social networks are often unrelated to an institution and only share a single touch point such as geography or scholarship provision.
- For example, (local) Rotary Clubs provide scholarships to secondary and higher education students.

Personal networks are a means of thematic recognition

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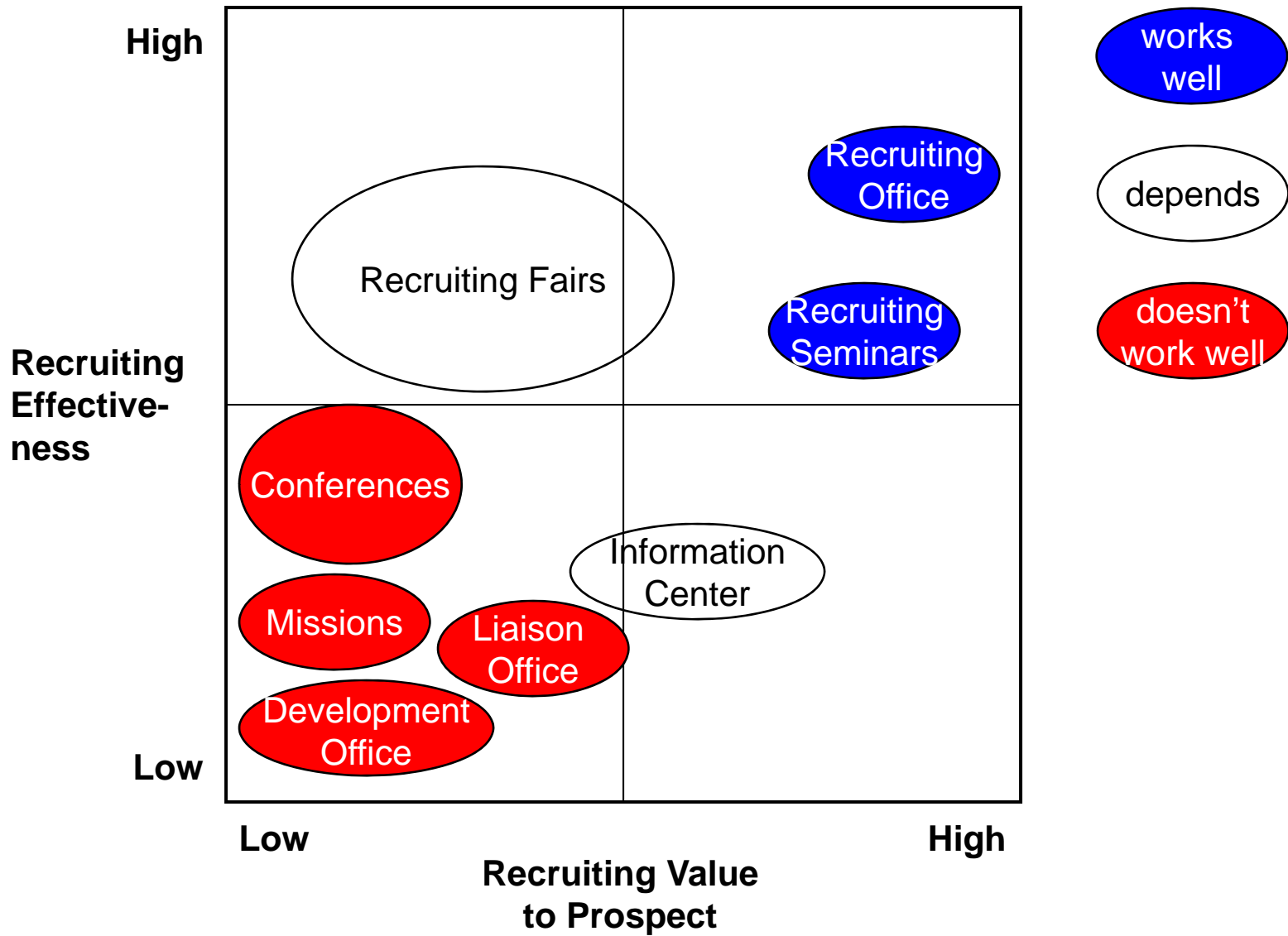
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LEVERAGE-BASED APPROACHES



LEVERAGE-BASED TOOLS

External Visits (I)

- **Recruiting Fairs**
 - Recruiting fairs are designed around yielding effective recruiting experiences through the direct or indirect aggregation of prospective students.
 - The value of such fairs depends on a number of factors, most notably the access of the fair itself to desirable applicants.
 - Small and/or targeted fairs (e.g. subject-based) can be both valuable and effective.
- **Recruiting Seminars**
 - Depending on particulars, recruiting seminars can be both valuable and effective.
 - While often run by agents, seminars are increasingly being held by institutions themselves as part of a “soft sell” approach. Soft selling works best in this regard when seminars are run in a partnership with local secondary and higher education institutions.
 - The effectiveness of seminars is largely conditioned by the resources required to create interest among potential participants.

Effectiveness of recruiting fairs and seminars varies

LEVERAGE-BASED TOOLS

External Visits (II)

- **Conferences**

- International education conferences such as NAFSA or EAIE do not involve students and are therefore not of great value for direct recruiting efforts. However, they can be effective in two ways.
- For one, they provide a point-in-time platform for institutional arrangements (e.g. signing of exchange agreements) and inter-institutional marketing (e.g. when entering a market).
- Secondly, some conferences have assumed a “must participate” quality in order to be an accepted participant in international education.

- **Missions**

- Missions (senior officers) have very limited direct recruiting value.
- If exchange agreements or other student mobility relevant initiatives are part of a mission, somewhat larger value can be attached to this approach.

Conferences and missions have a limited impact on recruitment

LEVERAGE-BASED TOOLS

In-country Presence (I)

- **Liaison Offices**
 - Few classical liaison offices have been set up with an explicit recruiting mission.
 - Those liaison offices which have taken on recruiting tasks often do so without the proper staffing support (i.e. no recruiting specialist staffing), or without proper integration into overall recruiting operations.
 - As a consequence many serve as little more than general information outlets, albeit at elevated costs levels and an impaired mission.
- **Recruiting Office**
 - The most focused recruiting tool in a local market, recruiting offices are typically small (often staffed by a single staff member).
 - In a sense, these offices assume the role of a specialized study advisor with a more obvious labeling.
 - The role of recruiting offices can be complex since they might overlap with local agents, offices of mobility services, or offices of alliances, and since the integration into recruiting processes at the home institution is not always trouble free.

In-country locations pose a risk of mismanagement

LEVERAGE-BASED TOOLS

In-country Presence (II)

- **Information Centers**

- Information centers can yield satisfactory value for recruiting operations by providing a localized presence which can act as a low cost filter.
- Information center staff should be able to provide relevant information, screen out potentially undesirable applicants, and refer prospective applicants to proper staff members at the home institution or local agents.
- Since recruiting is not the primary focus of an information center, any support of recruiting activities occurs at marginal expense.

- **Development Offices**

- The foremost task of a development office is to raise revenue.
- Depending on circumstance this may involve the support of alumni activities as well.
- In order to ensure a clarity of purpose most development offices therefore do not actively engage in any recruiting support.

In-country offices and centers should enhance recruitment efforts

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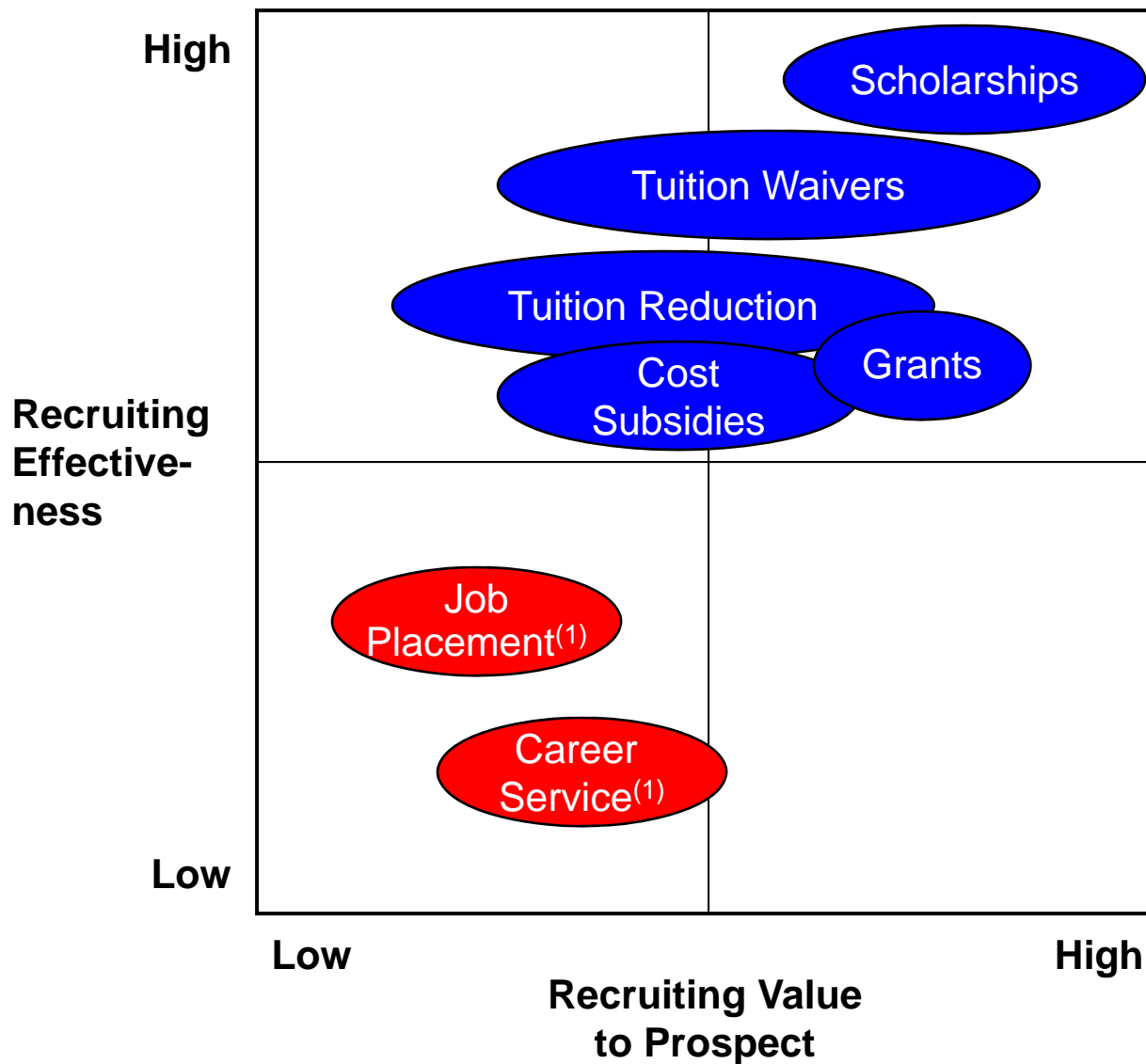
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RETURN ON INVESTEMENT APPROACHES



works well

depends

doesn't work well

(1) Note: Job placement and career services can be effective and are considered of value by prospective students. However, so far this value proposition is rarely communicated in a proper way with the exception of professional degree programs (postgraduate level).

RETURN ON INVESTMENT TOOLS

Financial Packaging (I)

- **Scholarships**

- **Scholarships are the single most effective recruiting tool available to an institution.**
- **They provide also the highest value since they are for the most part institutionally controlled and targeted at talented recruits.**
- **Highly talented applicants often have the luxury to reverse-select an institution based on not just whether or not a scholarship will be granted but also how generous a scholarship is.**
- **Scholarships may or may not include tuition waivers.**

- **Tuition waivers**

- **The second most effective recruiting tool available to an institution is tuition waivers.**
- **Their attraction to an applicant is a direct function of the level of tuition waived (overall and relative to brand).**

Talent is a costly and rare commodity

RETURN ON INVESTMENT TOOLS

Financial Packaging (II)

- **Tuition Reduction**
 - Tuition reduction is a recruiting tool of medium effectiveness because of its at times socio-political nature which results in a social welfare provision rather than competitive selection dynamic.
 - It nonetheless does have a measurable impact on competitive decision-making.
- **Cost Subsidies**
 - Cost subsidies in the form of affordable on-campus housing, free or low cost health care, and other benefits and discount schemes can serve as recruiting arguments in competitive scenarios.
- **Grants**
 - Grants are often an indirect yet valuable recruiting tool.
 - Since all but a few grants are only available to enrolled students, prospective students tend to discount the actual value (risk reduction approach).

Some financial packaging tools have a limited impact on recruitment

RETURN ON INVESTMENT TOOLS

Placements

- **Career Services**
 - Career services have gained in institutional relevance over time but their utilization is still skewed amongst disciplines.
 - Applicants who plan to take business-oriented professional degrees (e.g.; law, management, business engineering) tend to take career service offerings into consideration during the recruiting process.
- **Job Placements**
 - Propagating actual job placements is a delicate matter since it is the graduate him- or herself who gains a position.
 - Therefore, institutional information about job placements tends to carry more of an enabling and congratulatory connotation.
 - This results in limited direct value in the recruiting process.

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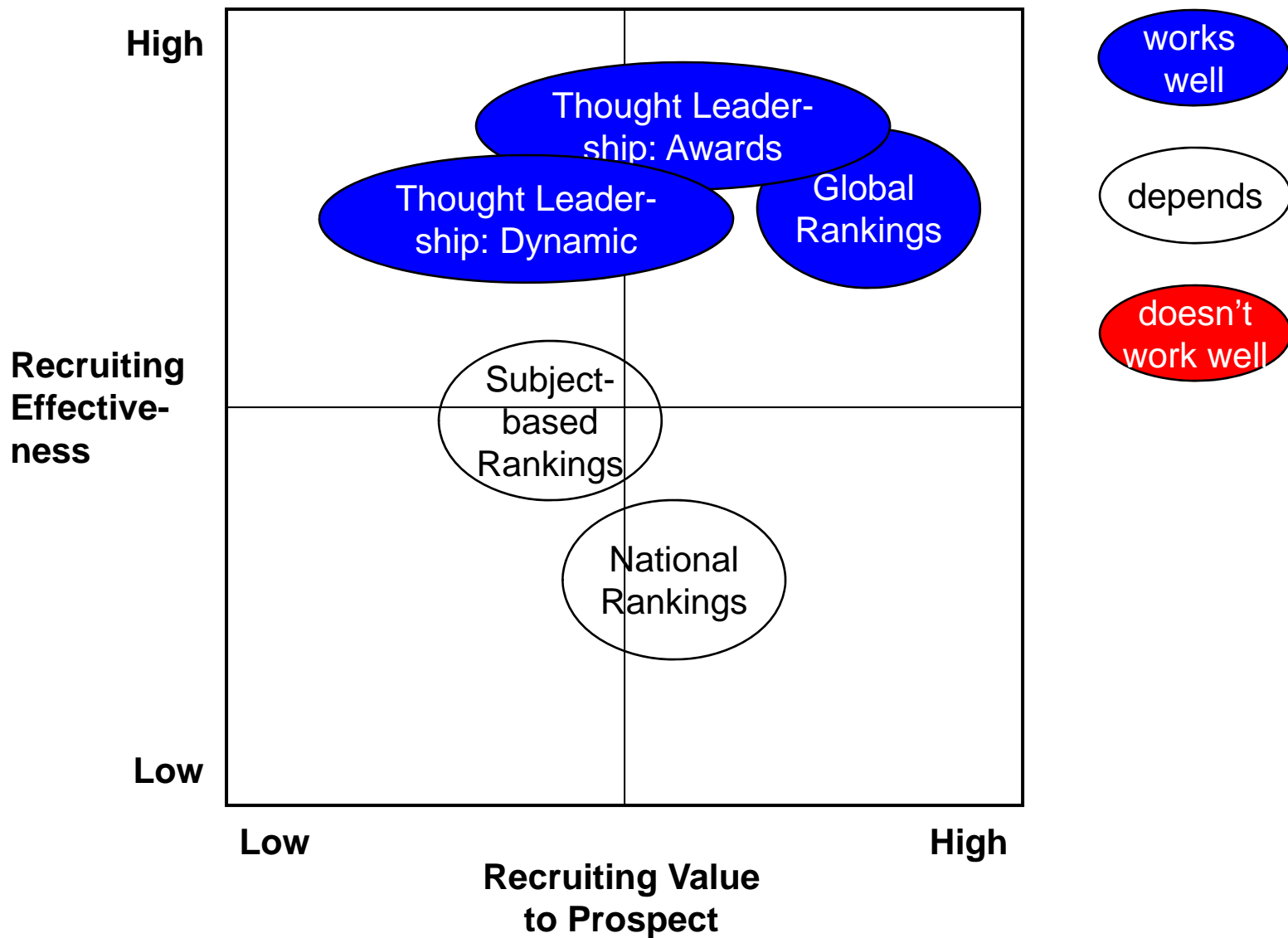
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ACADEMIC BRANDING APPROACHES



ACADEMIC BRANDING TOOLS

Rankings

- **Global Rankings**
 - These rankings have a powerful influence on potential applicants as a binary tool (ranked or not ranked), as a positioning tool (rank relative to another rank), and as a cut-off tool (not ranked below a certain position).
 - Unranked institutions are bound to contextualize the fact that they are not ranked or focus on branded subjects.
- **Subject-matter Rankings**
 - These ranking have gained in prominence after having largely been confined to professional subjects such as law and business.
 - These rankings can be fairly effective depending on the acceptance of the ranking itself.

Global rankings are an efficient tool for global brand recognition

ACADEMIC BRANDING TOOLS

Thought Leadership

- **Prizes**
 - Prizes and awards in this category fall into a global (e.g. Noble Prizes, Fields medals) or a significant national category (e.g. McArthur “genius” grants).
 - These prizes are entirely a reflection of an institution’s scientific achievements and thus are heavily concentrated among a small number of universities and research institutions.
- **Dynamic Thought Leadership**
 - Dynamic thought leadership denotes the reputation an institution has earned for its leading contribution to one or more science and innovation fields.
 - For example, the University of Chicago became well known for having defined economic theory for much of the 1980s and 1990s.
 - Dynamic thought leadership often tends to be specific, rendering it a valuable but not always effective tool.

Thought leadership boosts institutional reputation

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COMPETITIVE POSITION OF DANISH INSTITUTIONS

Rationale for Benchmarking

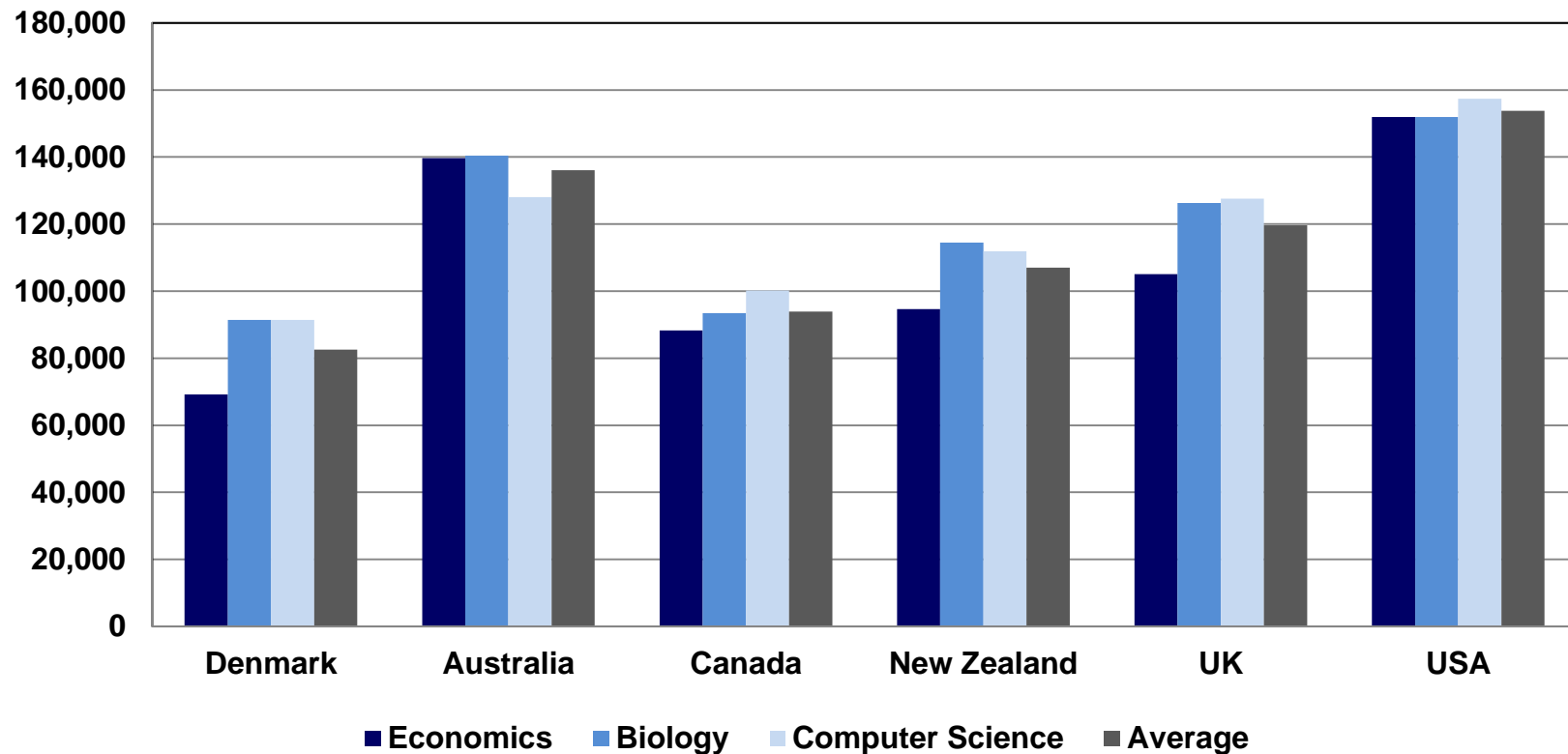
Institution	ARWU 2011 Rank	Enrollment	Country
University of North Carolina Chapel Hill	42	29,390	USA
University of Copenhagen	43	36,891	Denmark
Texas A&M University	53	49,129	USA
University of Florida	72	50,116	USA
University of Helsinki	74	36,609	Finland
Aarhus University	86	30,414	Denmark
University of Adelaide	201-300	24,151	Australia
Umeå University	201-300	36,700	Sweden
University of Southern Denmark	201-300	21,400	Denmark

Anglo-Saxon and Nordic competitors of similar rank

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Investment Required to Attend University – Undergraduate Students

**Sample Undergraduate Tuition Fees by Study Field (DKK)
Denmark and Select High Cost Destination Countries**



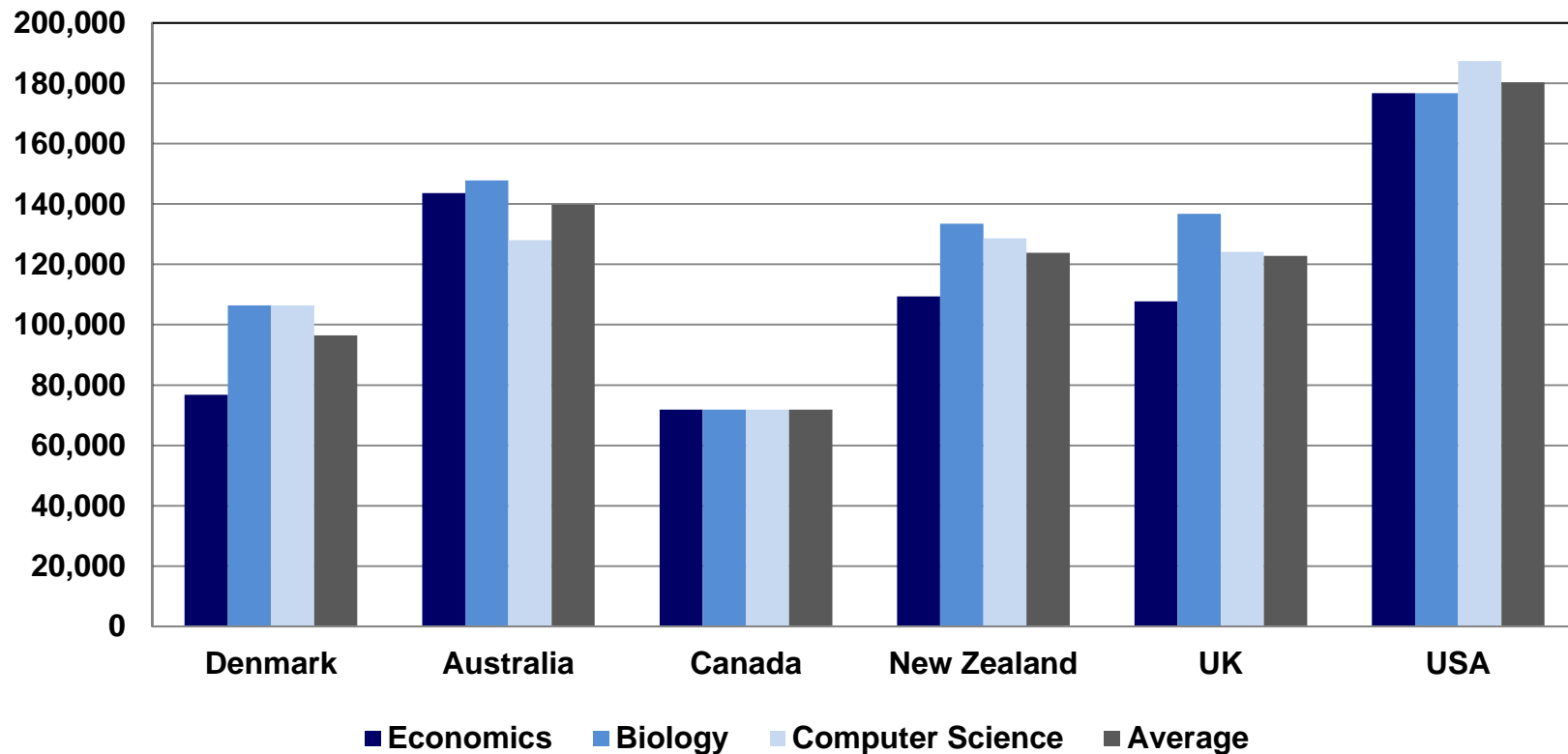
Danish universities' tuition fees are lower than competitor fees

Sources: ICG calculations based on universities.

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Investment Required to Attend University – Graduate Students

**Sample Graduate Tuition Fees by Study Field (DKK)
Denmark and Select High Cost Destination Countries**



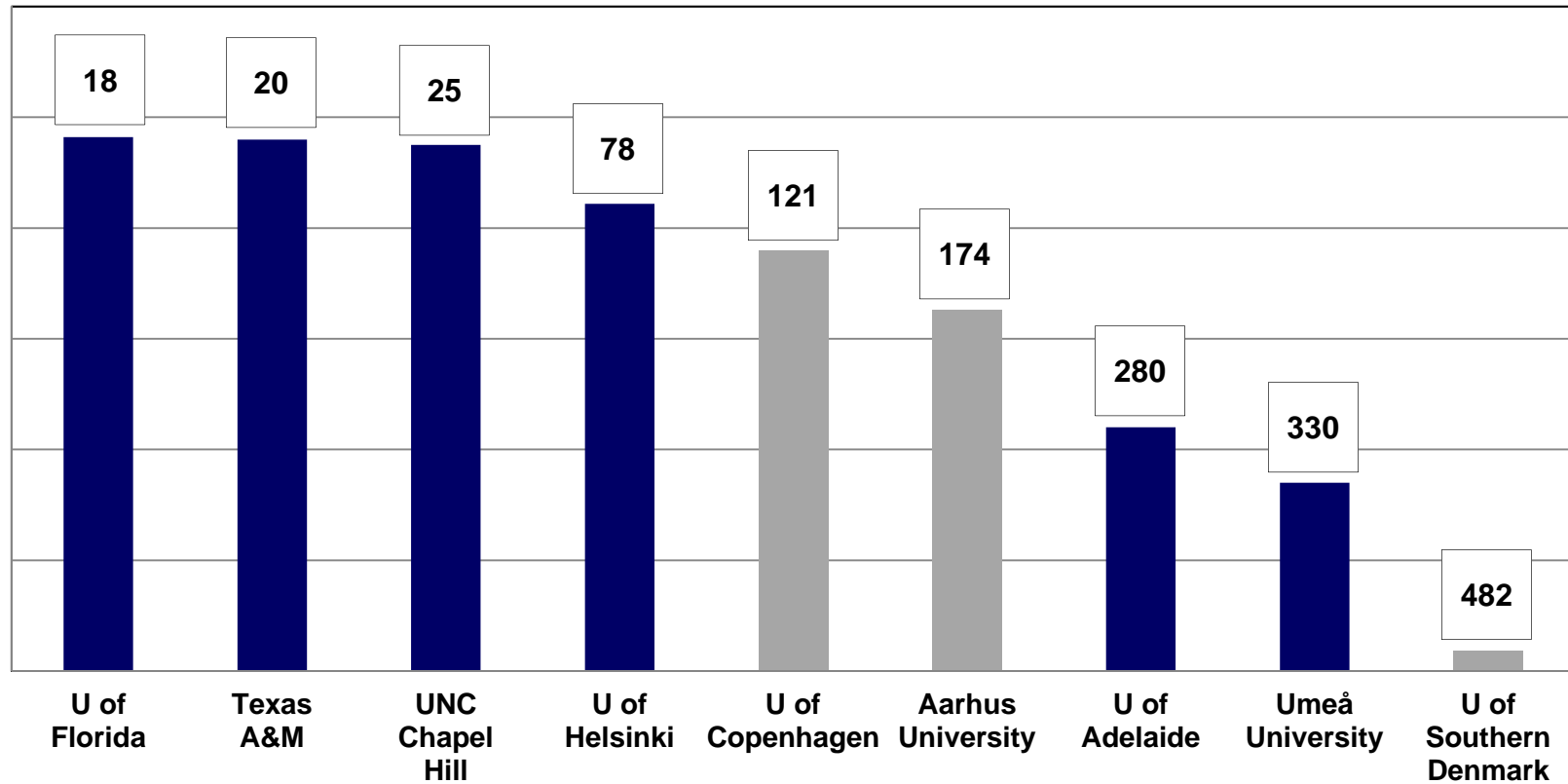
Danish universities' tuition fees are lower than competitor fees (ex Canada)

Sources: ICG calculations based on universities.

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Web Presence

Webometrics University Websites Rankings (2011)



Danish universities trail competitors' website footprints

Source: Webometrics.

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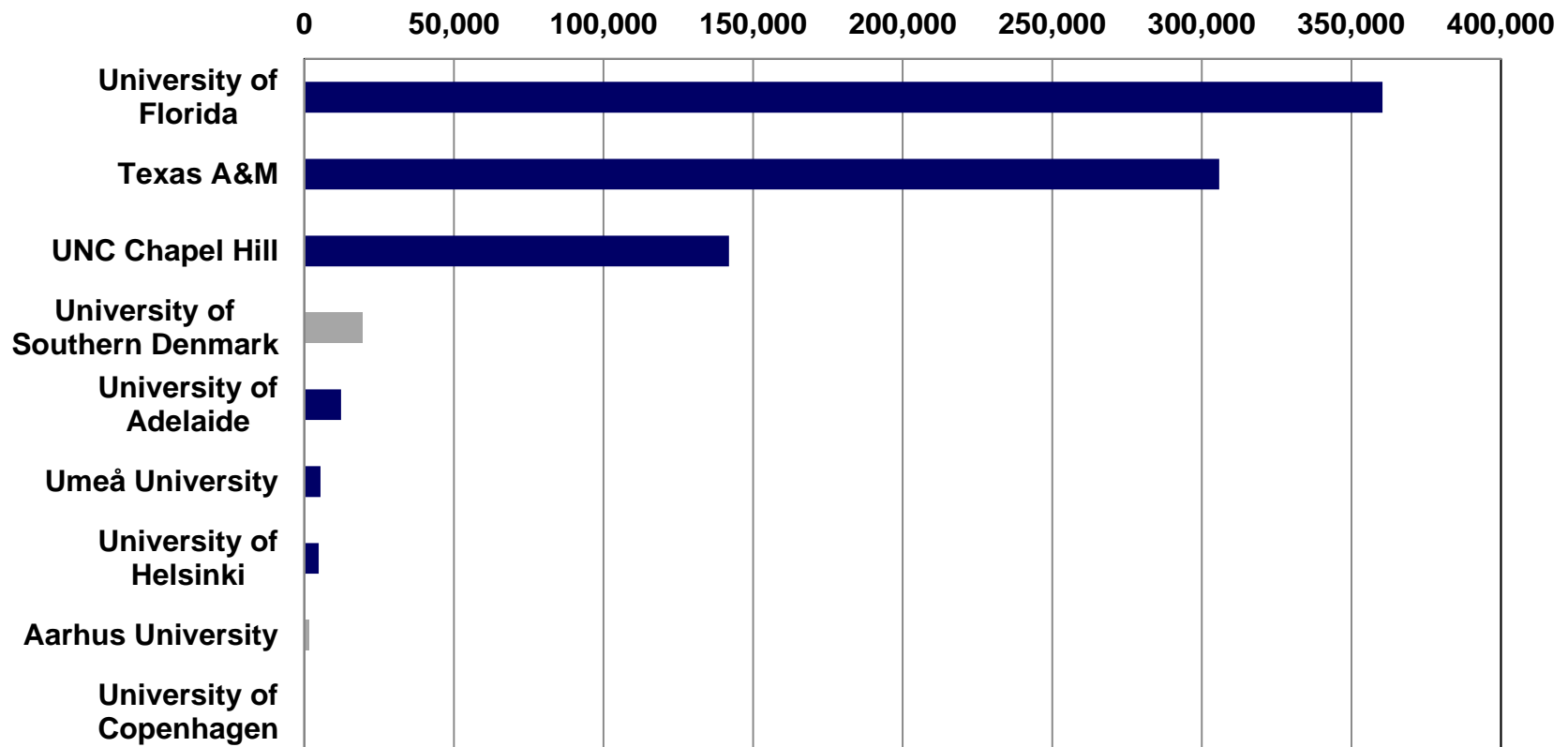
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COMPETITIVE POSITION OF DANISH INSTITUTIONS

Use of Social Media: Facebook

Official Universities' Pages - Facebook Likes by Institution



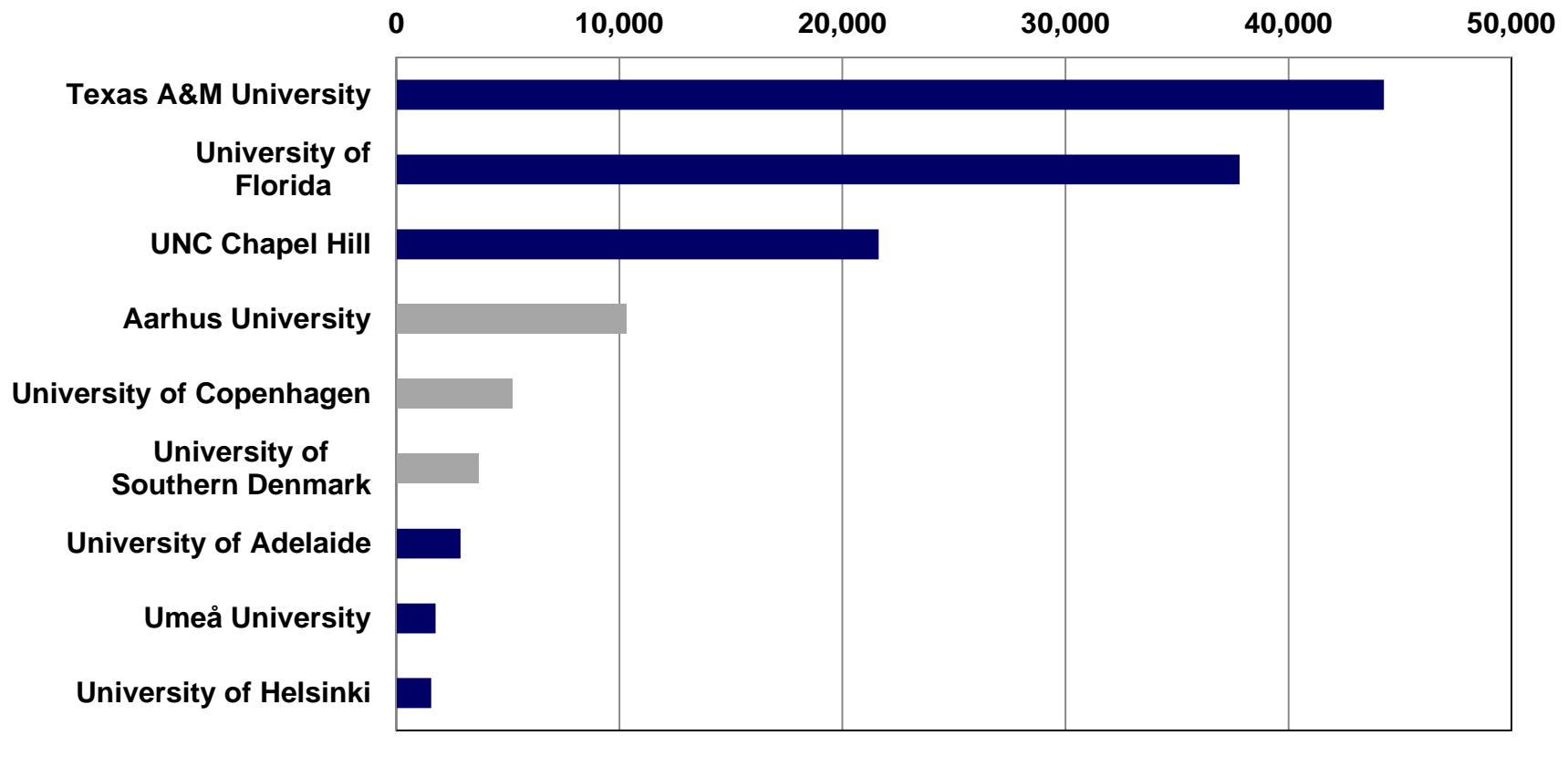
Danish universities are nearly invisible on Facebook...

Source: Facebook.

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Use of Social Media: LinkedIn

Members of the Top Five Largest LinkedIn Groups by Institution

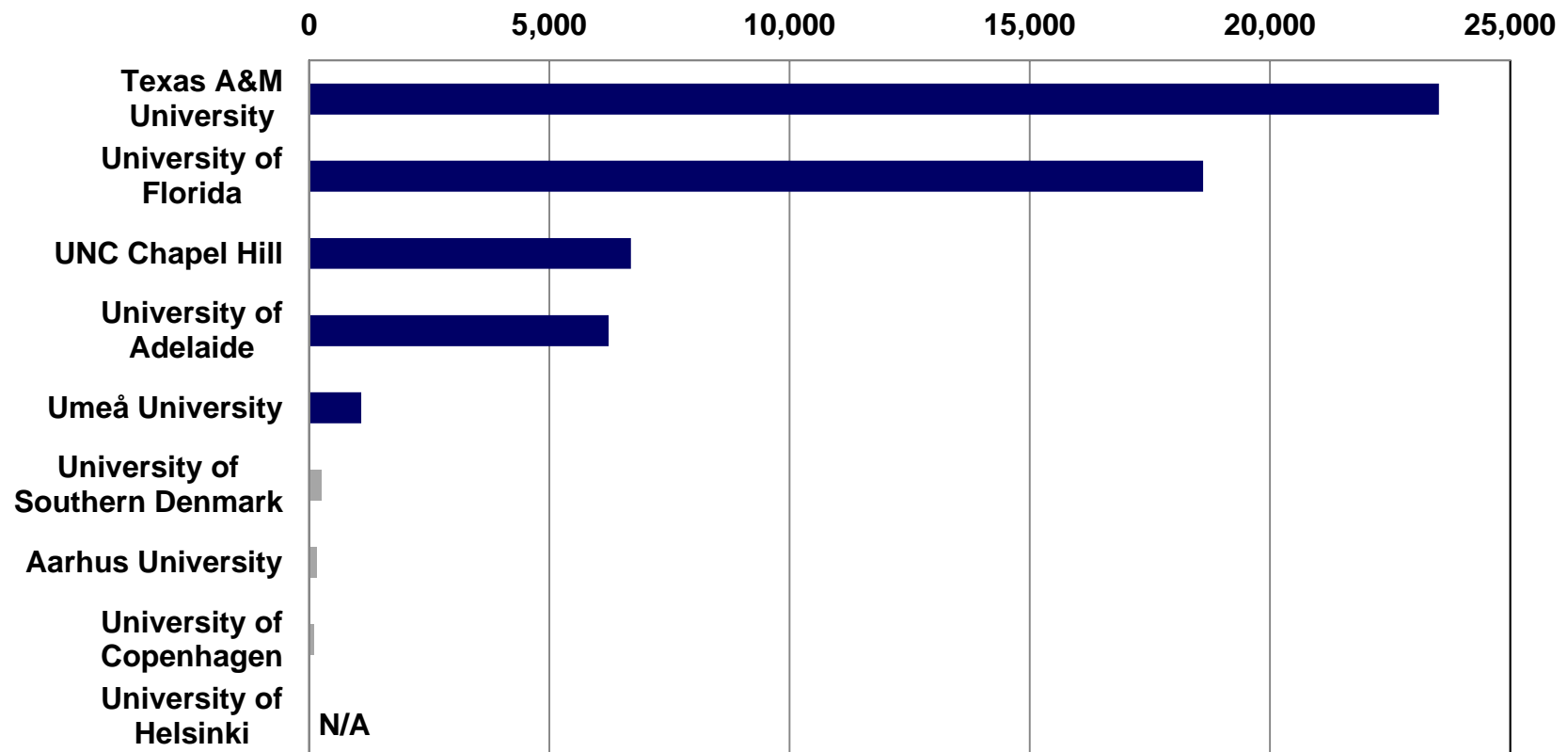


...while the presence on LinkedIn is more advanced

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Use of Social Media: Twitter

Followers by Official Institution Twitter Account



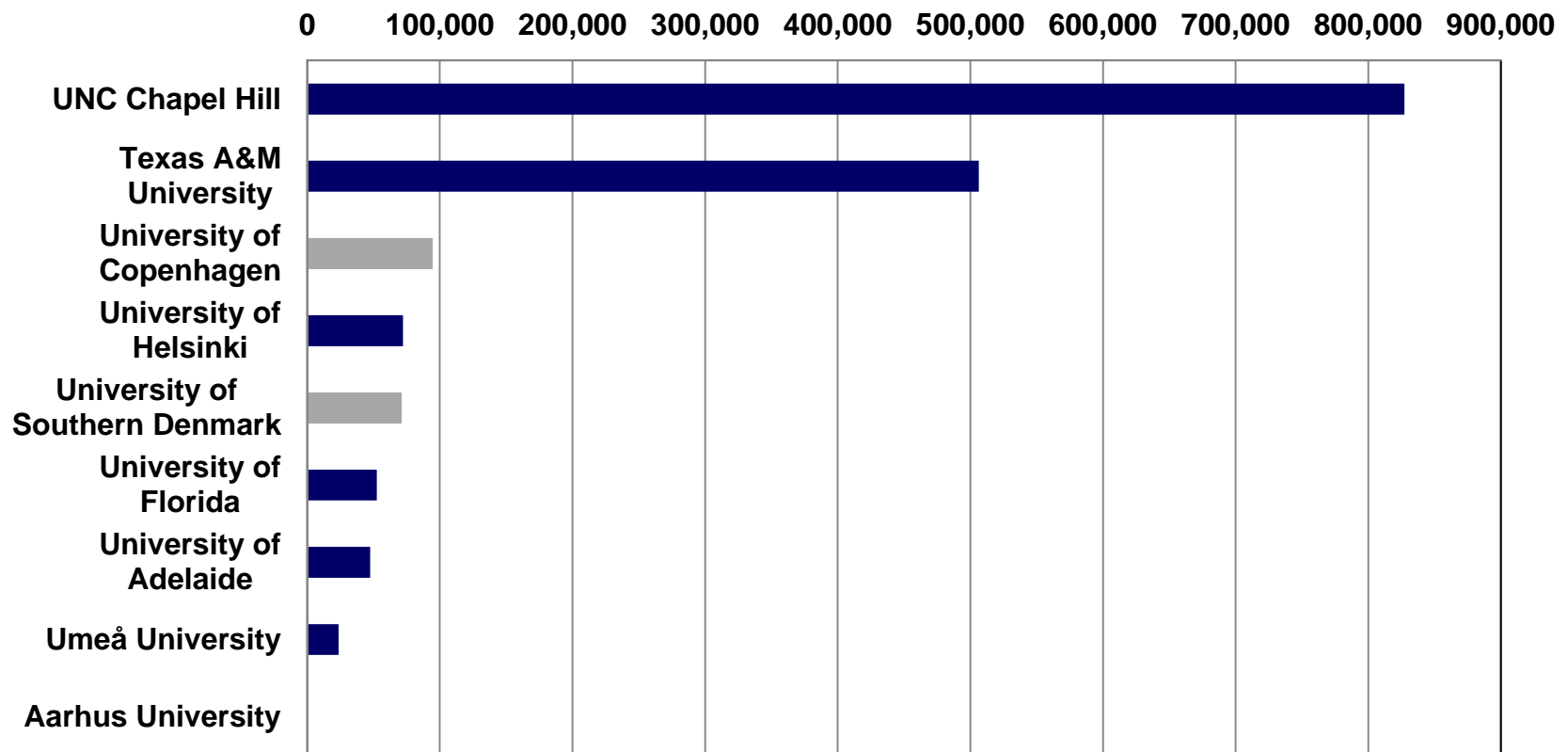
Twitter is terra incognita

Source: Twitter.

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Use of Social Media: YouTube

YouTube Total Upload Views by Institution Official Channel



Some usage of YouTube – what about .EDU channels?

Source: YouTube.

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Academic Branding: ARWU and THES-TR Compared

Institution	ARWU 2011	THES-TR 2011
University of Copenhagen	43	135
Aarhus University	86	125
Technical University of Denmark	151-200	178
University of Southern Denmark	201-300	251-275

High research performance, less recognition for broader ranking aspects

Source: ARWU, THES-TR.

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COMPETITIVE POSITION OF DANISH INSTITUTIONS

ARWU Ranking Historical Trend

Institution	2007	2008	2009	2010	2011
University of Copenhagen	46	45	43	40	43
Aarhus University	102-150	93	97	98	86
Technical University of Denmark	151-202	152-200	152-200	151-200	151-200
University of Southern Denmark	203-304	303-401	303-401	301-400	201-300

Aarhus has done very well in international comparison

COMPETITIVE POSITION OF DANISH INSTITUTIONS

THES-TR Historical Trend

Institution	2010	2011
University of Copenhagen	177	135
Aarhus University	167	125
Technical University of Denmark	Not Ranked	178
University of Southern Denmark	Not Ranked	251-275

A big bounce in 2011

Source: THES-TR. Notes: The THES-TR ranking has been expanded from 200 to 400 institutions in 2011.

COMPETITIVE POSITION OF DANISH INSTITUTIONS

Perspectives

- **Danish universities have solid research foundations to build on. This is a key competitive advantage.**
- **Many other performance aspects – especially those which drive or attract international student awareness – lag behind. This is a key competitive disadvantage.**
- **Denmark's international student footprint is small, and Danish universities by themselves are with few exceptions not visible in many target markets.**
- **Approaches to broaden and grow the recruiting of quality international students will have to be driven both by internal (professionalization of recruiting) as well as external measures (e.g., alliances, industry cooperation, joint ventures).**

Academic quality will be the key driver for any positioning/recruiting effort

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