

# **ACCC Annual Conference**

**Engaging with Asia**

**This presentation was delivered on 5 June 2010 at the ACCC Annual Conference in Niagara Falls.**

**This presentation shall be considered incomplete without oral clarification, and no inferences shall be made from the presentation itself.**

## Growth scenario

**Overview recruiting countries**

**Comments on new/old players**

**Private providers**

**Emerging issues**

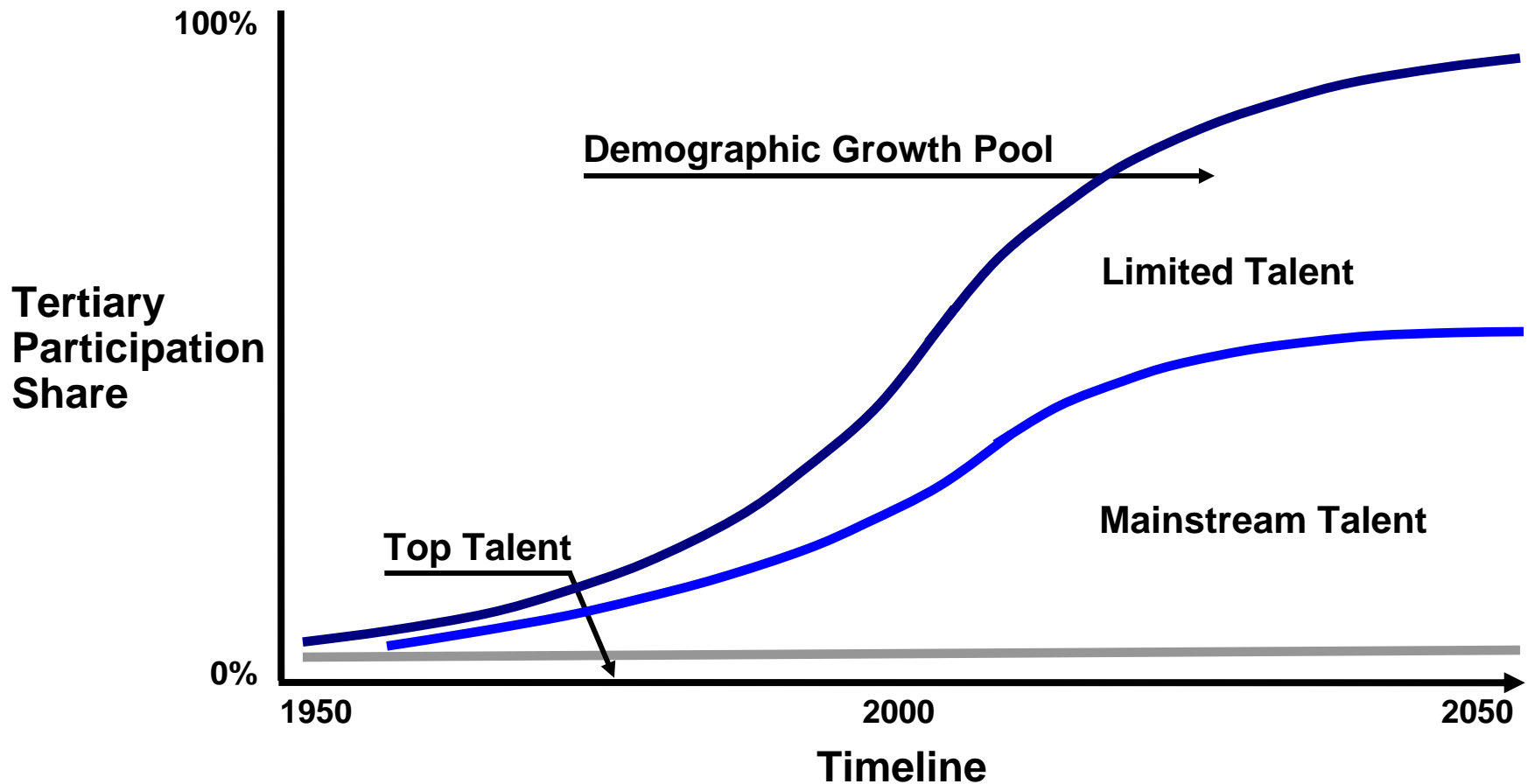
**Social media**

**Brand Canada**

**Balanced portfolio approach**

**Quality control**

# THE TALENT COMPOSITION OF TERTIARY STUDENTS HAS BEGUN TO SHIFT



Notes: The above graphic is an abstraction of a global bell curve distribution model, i.e. the relative distribution of talent over time is being held equal. Shifting participation rates are thus an expression of the increase or decrease in participation yield within a talent stratum. Other effects such as the increase in overall educational performance due to improvements in nutrition and educational provision as well as policy-making effects are not considered.

Sources: Doctoral dissertation research Daniel J. Guhr, ICG.

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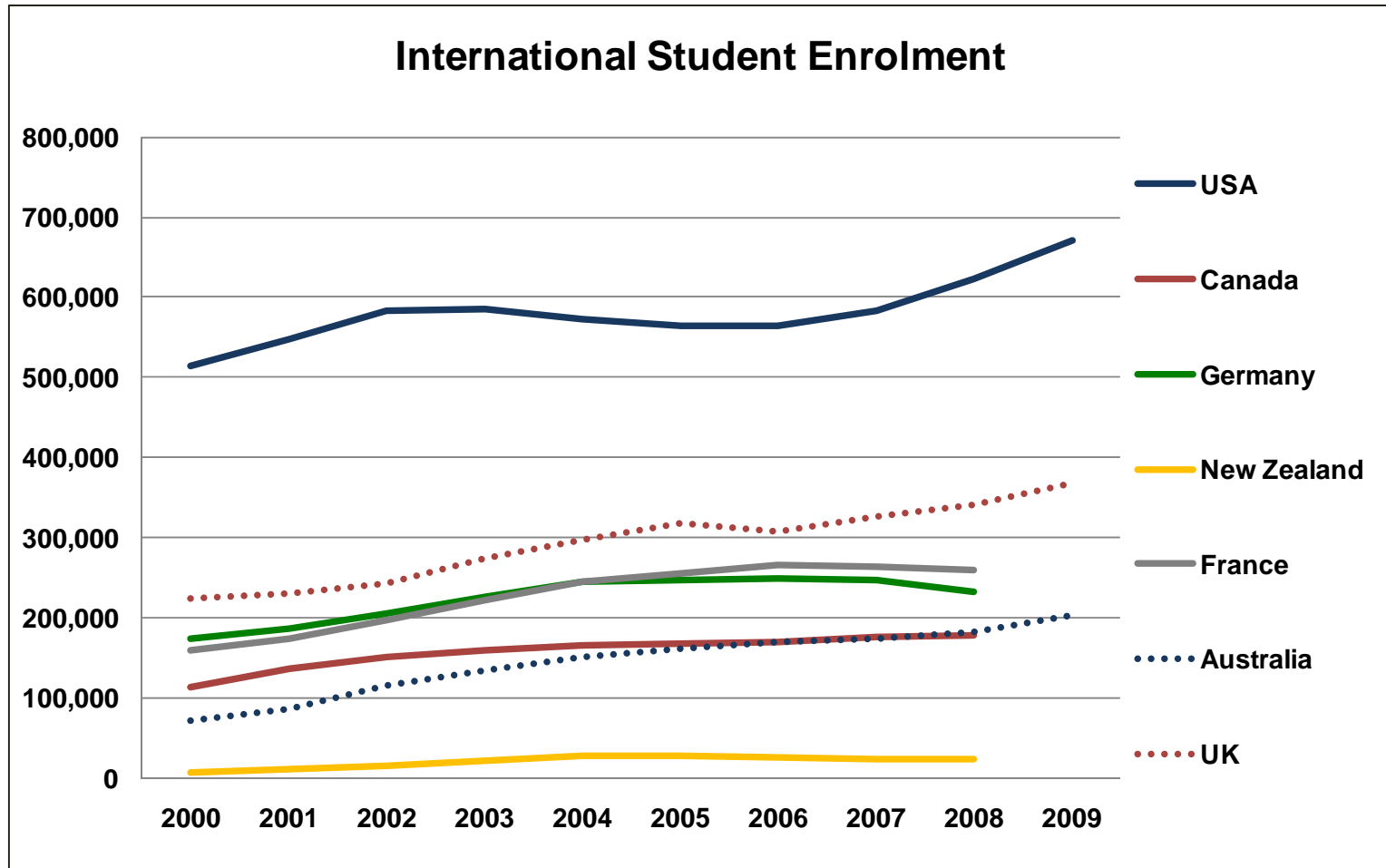
**Brand Canada**

**Balanced portfolio approach**

**Quality control**

# KEY INTERNATIONAL EDUCATION COUNTRIES (I)

## Total Higher Education International Student Enrolments

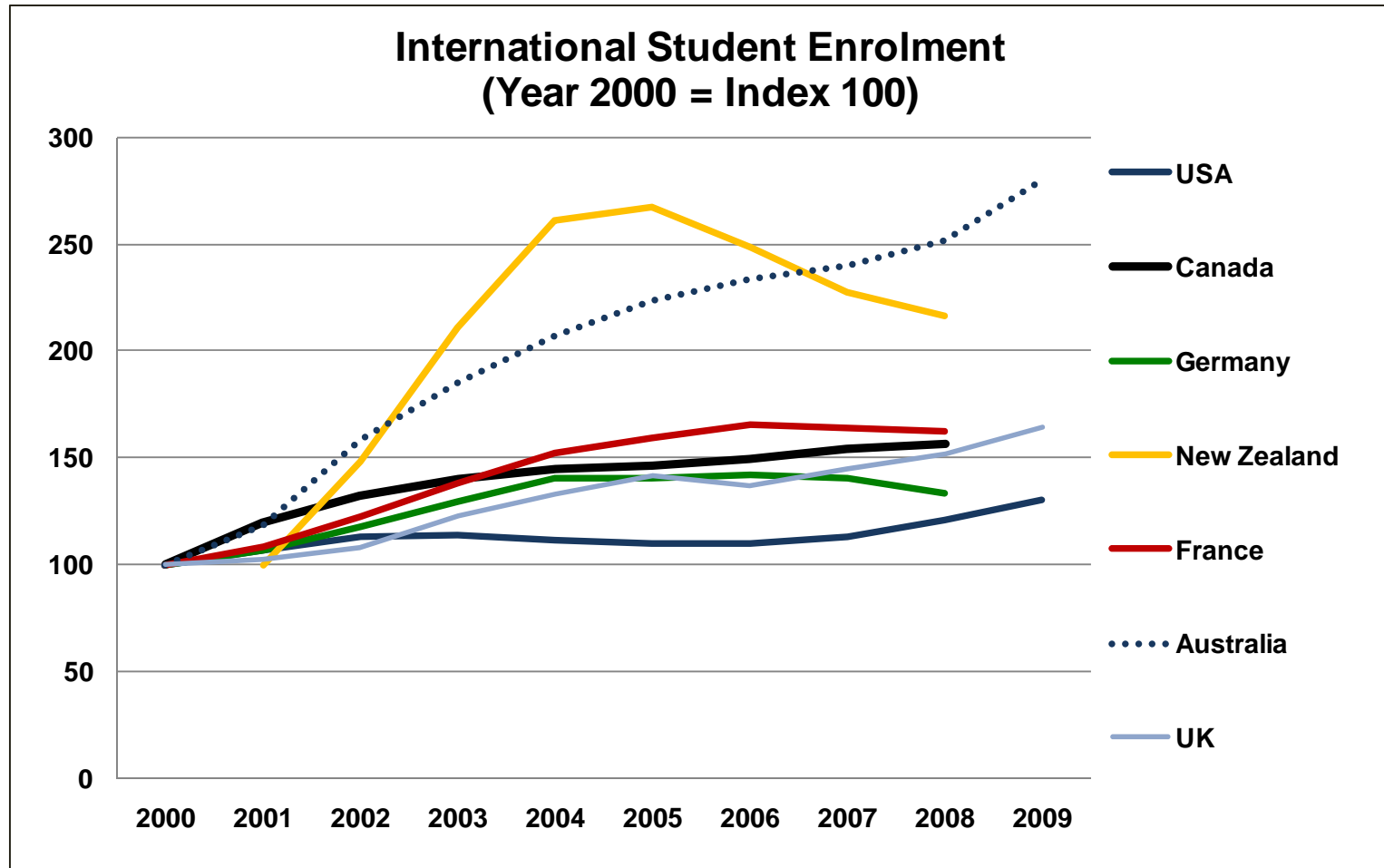


**Overall enrolment growth, but different dynamics are evident**

Sources: AEI, CampusFrance, CIC, DAAD/HIS, ENZ, HESA, IIE.

# KEY INTERNATIONAL EDUCATION COUNTRIES (II)

## International Higher Education Students, Index-based Trends

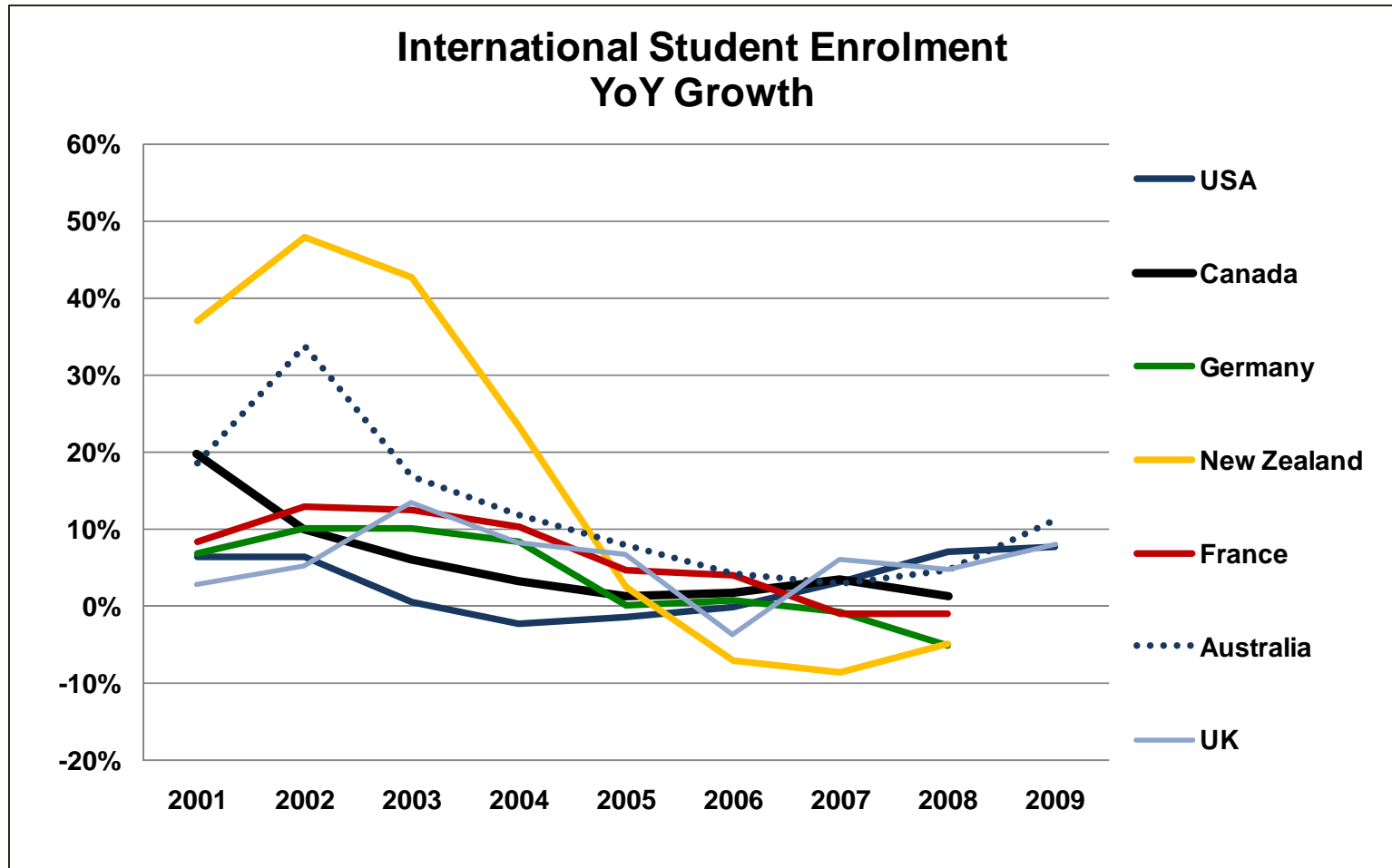


**Patterns: Sustained growth, plateau, and swings**

Sources: AEI, CampusFrance, CIC, DAAD/HIS, ENZ, HESA, IIE.

# KEY INTERNATIONAL EDUCATION COUNTRIES (III)

## International Higher Education Students, Year-over-Year Trends



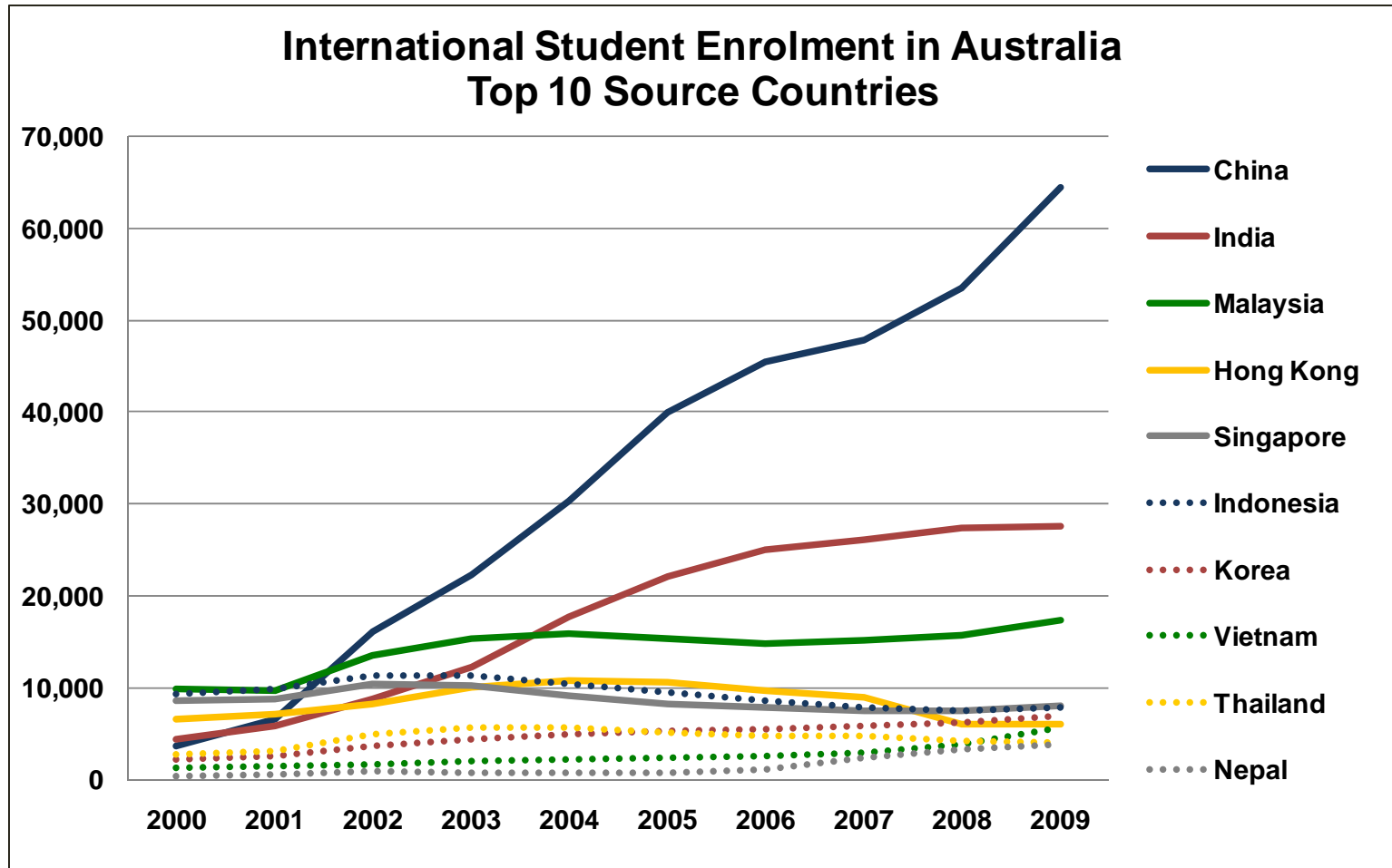
**Trend: Declining growth rates, but what about 2009?**

Sources: AEI, CampusFrance, CIC, DAAD/HIS, ENZ, HESA, IIE.



# AUSTRALIA (I)

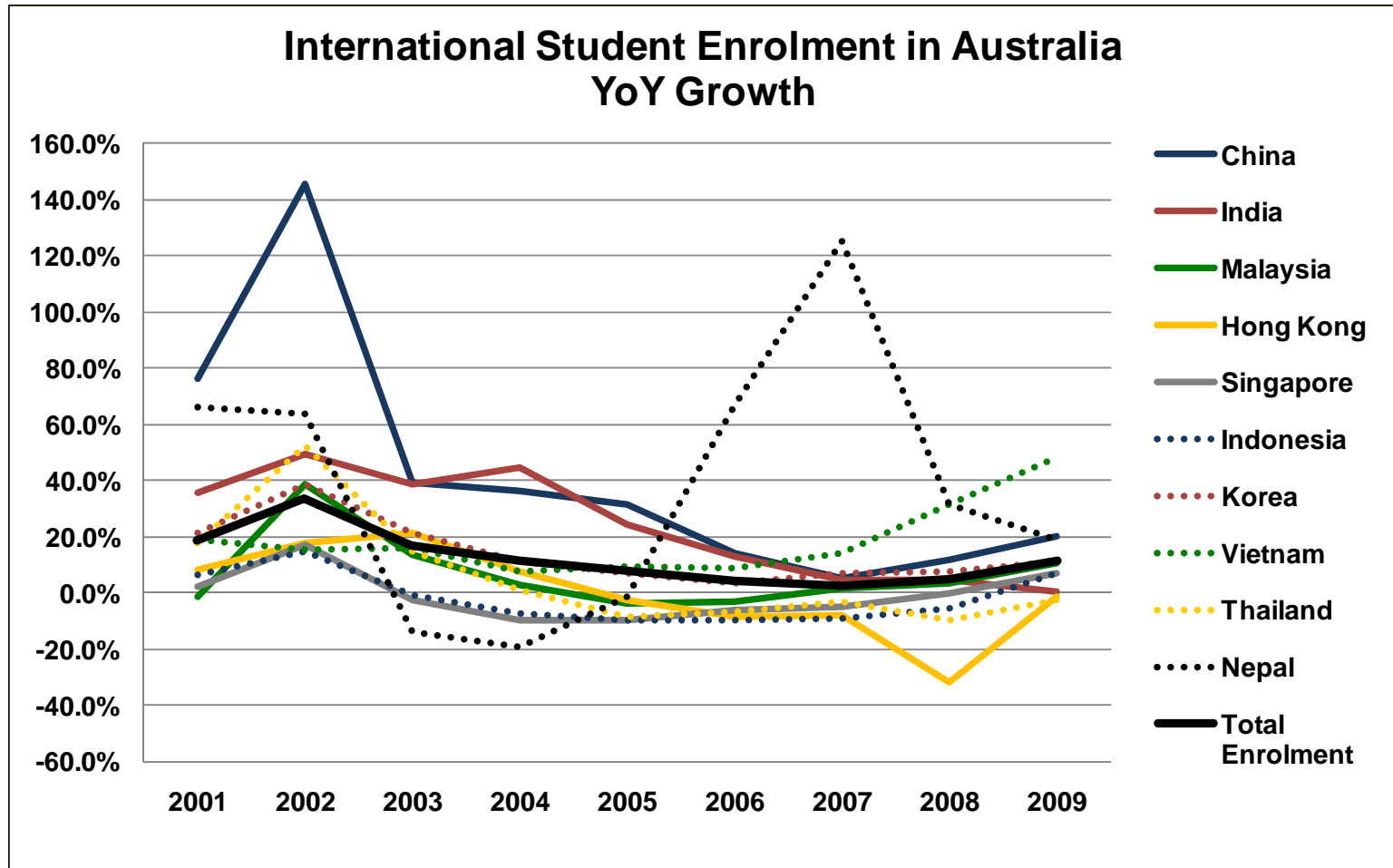
## From 72,717 to 203,324 Higher Education Students



**Growth has been driven by China and India**

# AUSTRALIA (II)

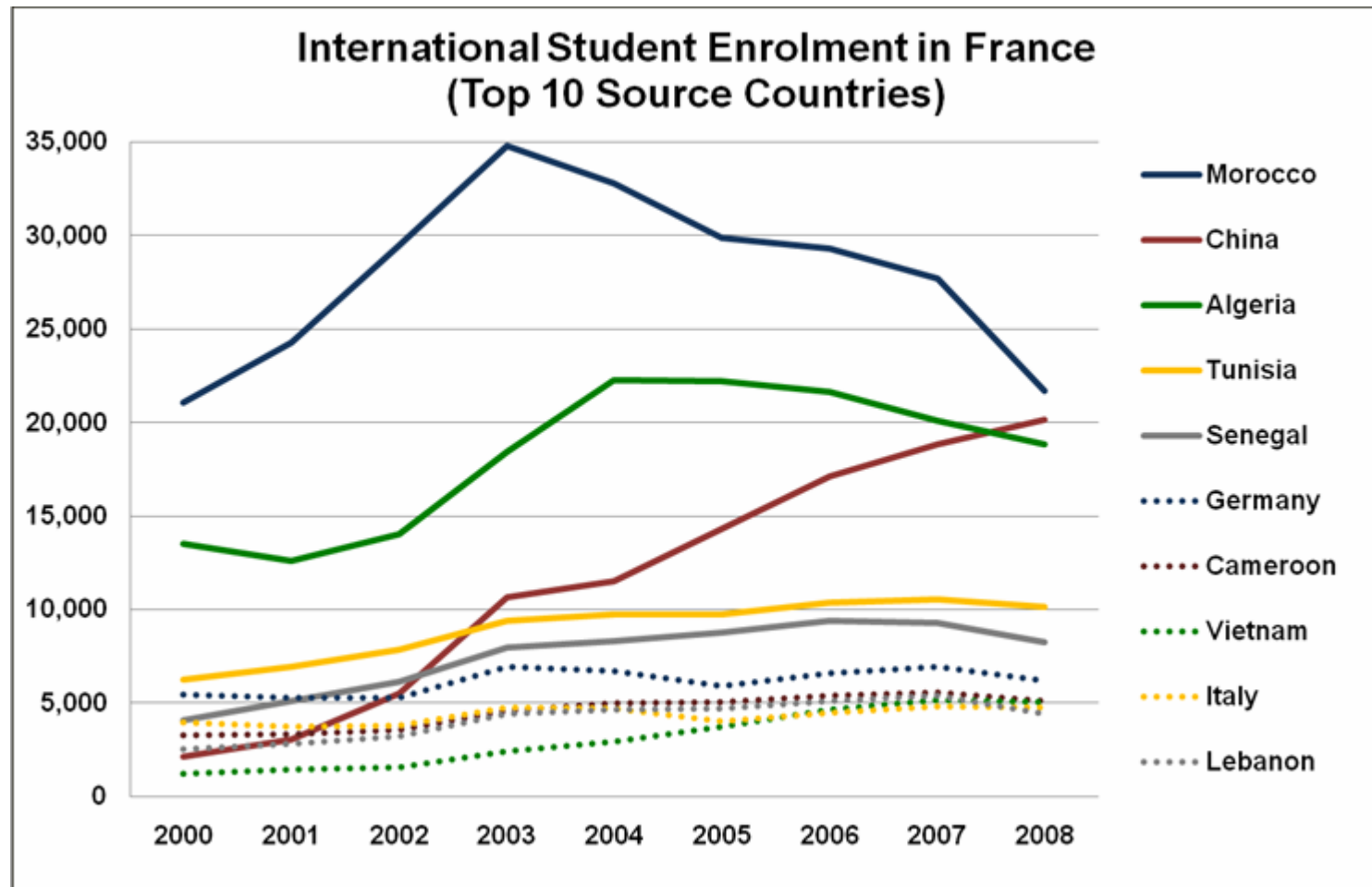
## 11.2% YoY Growth in 2009



**Growth rates have begun to slow down, but are still positive**

# FRANCE (I)

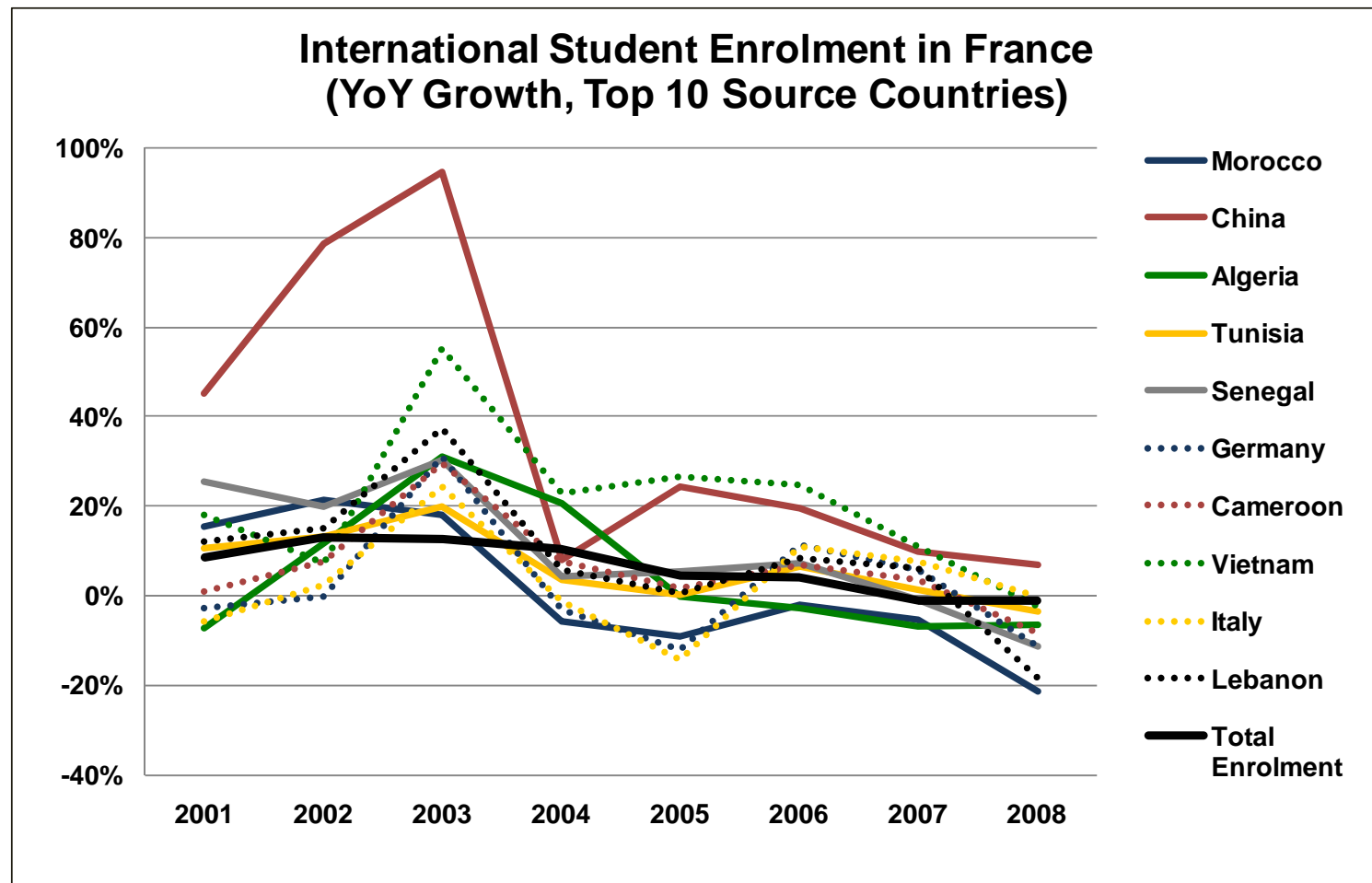
## From 160,553 to 260,596 Higher Education Students



**France has a distinct intake pattern; China is underpinning enrolments**

## FRANCE (II)

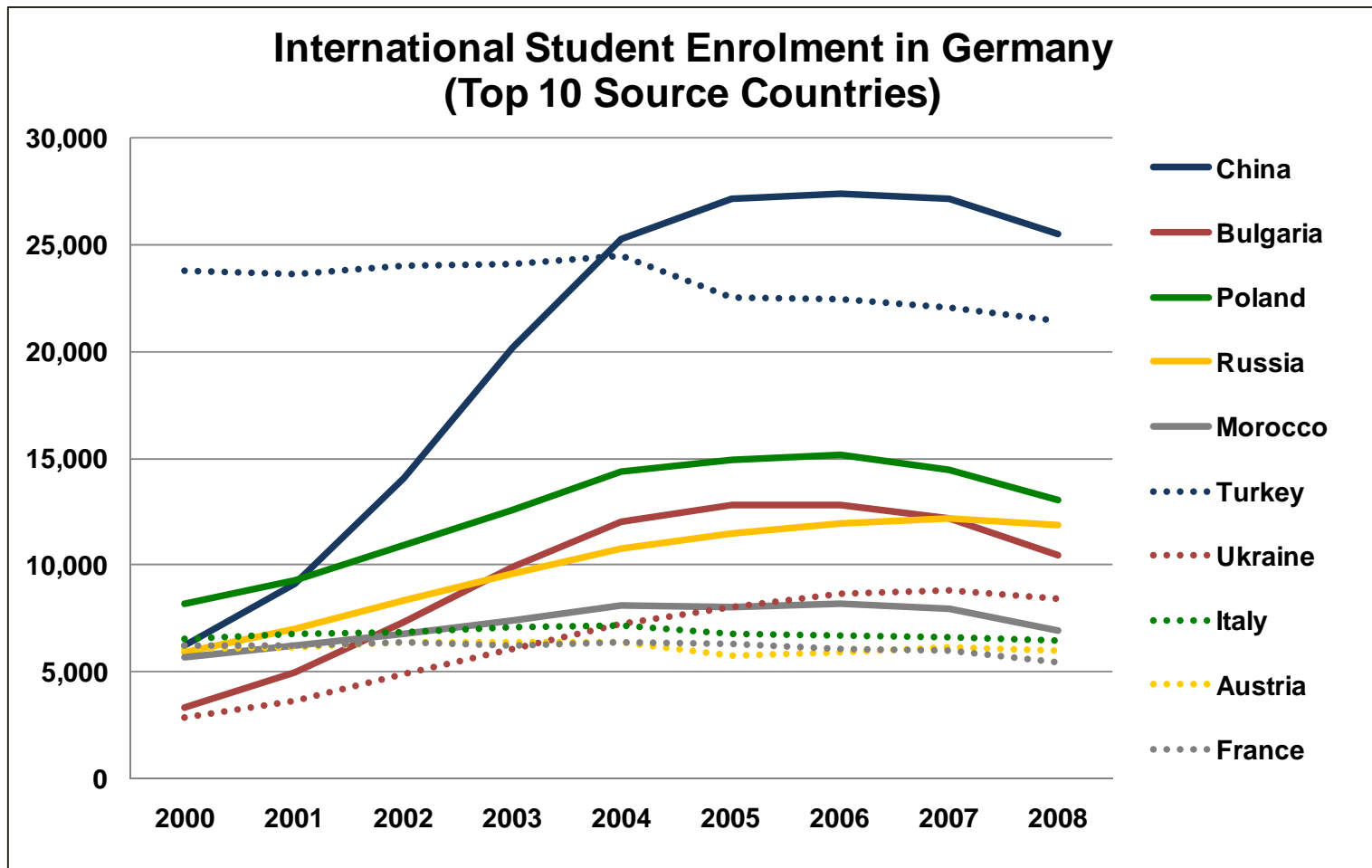
### -0.9% YoY Growth in 2008



**9 out of 10 leading source countries have gone negative**

# GERMANY (I)

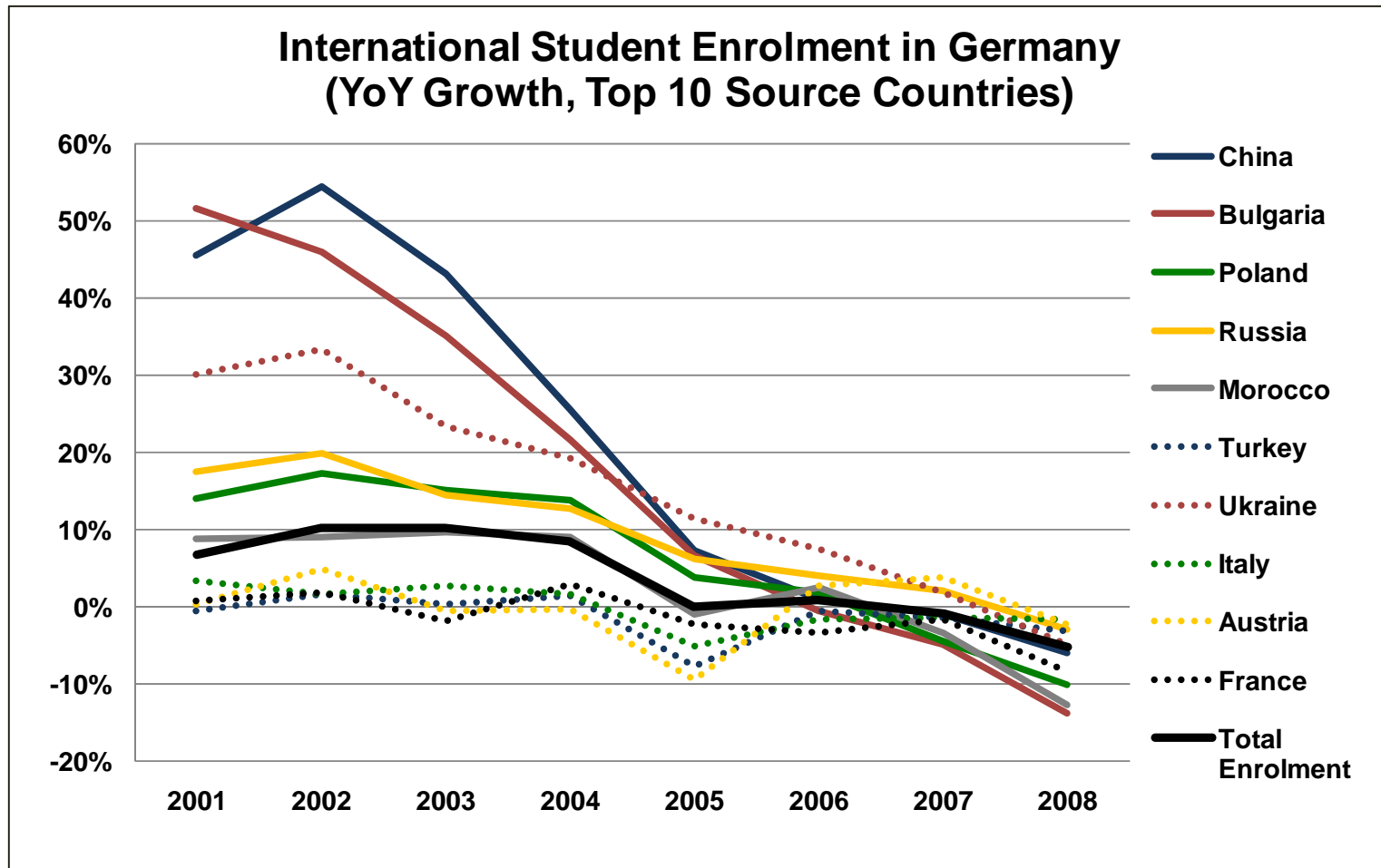
## From 175,065 to 233,606 Higher Education Students



**China and Eastern Europe have driven past growth**

# GERMANY (II)

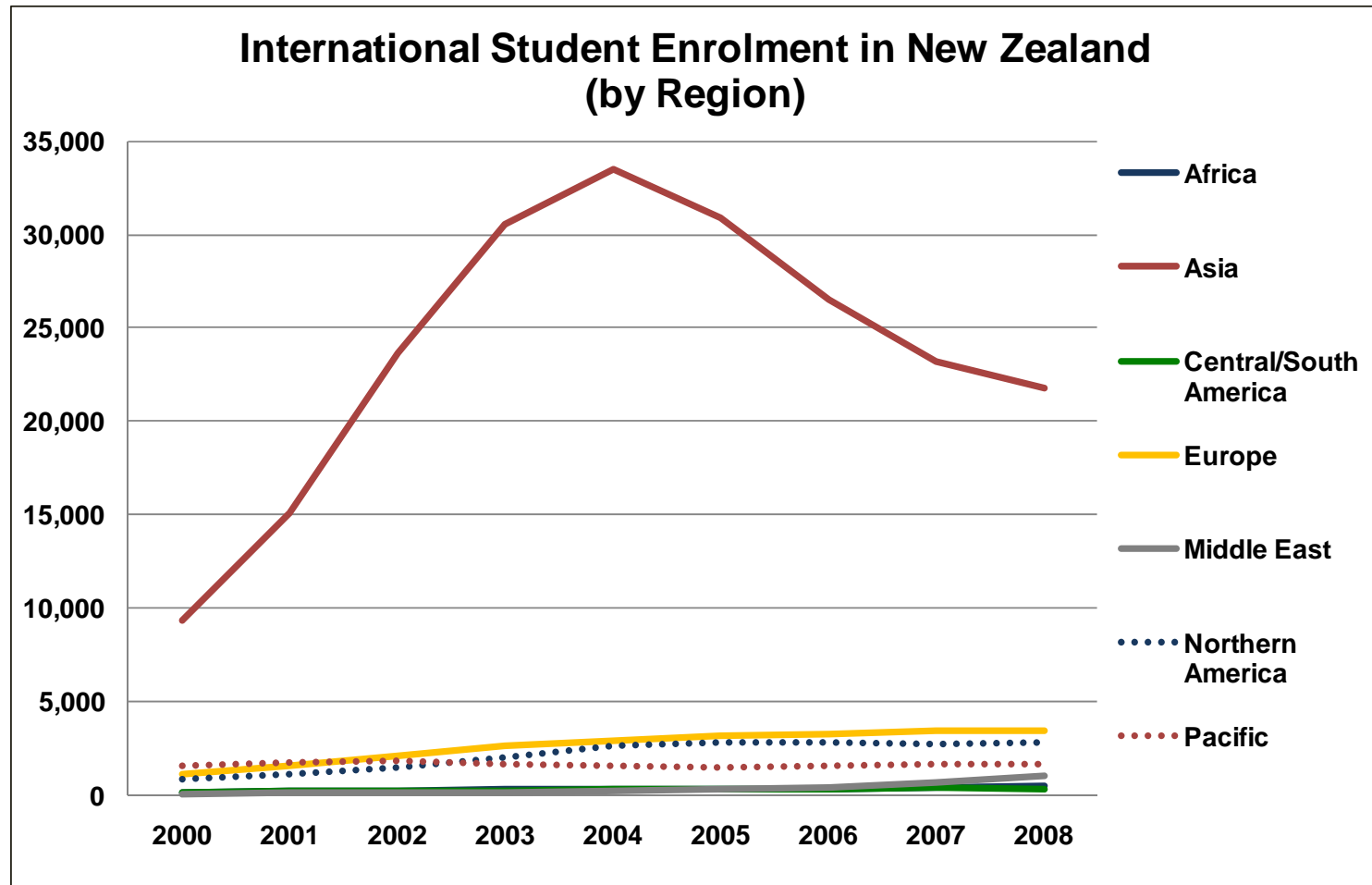
## -5.6% YoY Growth in 2008



**All Top 10 source countries have gone negative**

# NEW ZEALAND (I)

## From 13,246 to 31,620 Higher Education Students

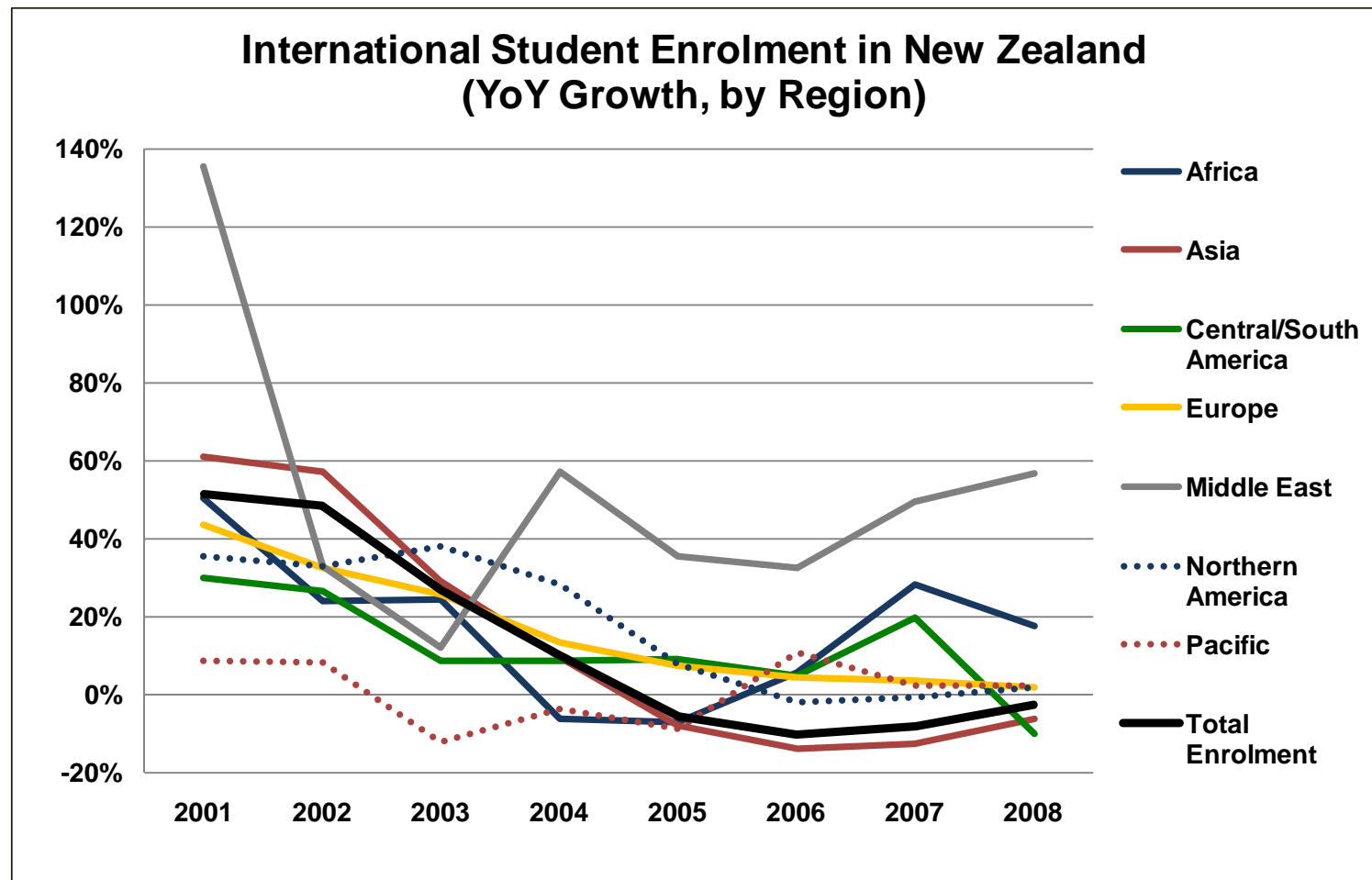


**Growth has been driven by Asia (China)**

Source: ENZ, Ministry of Education.

## NEW ZEALAND (II)

### -2.8% YoY Growth in 2008



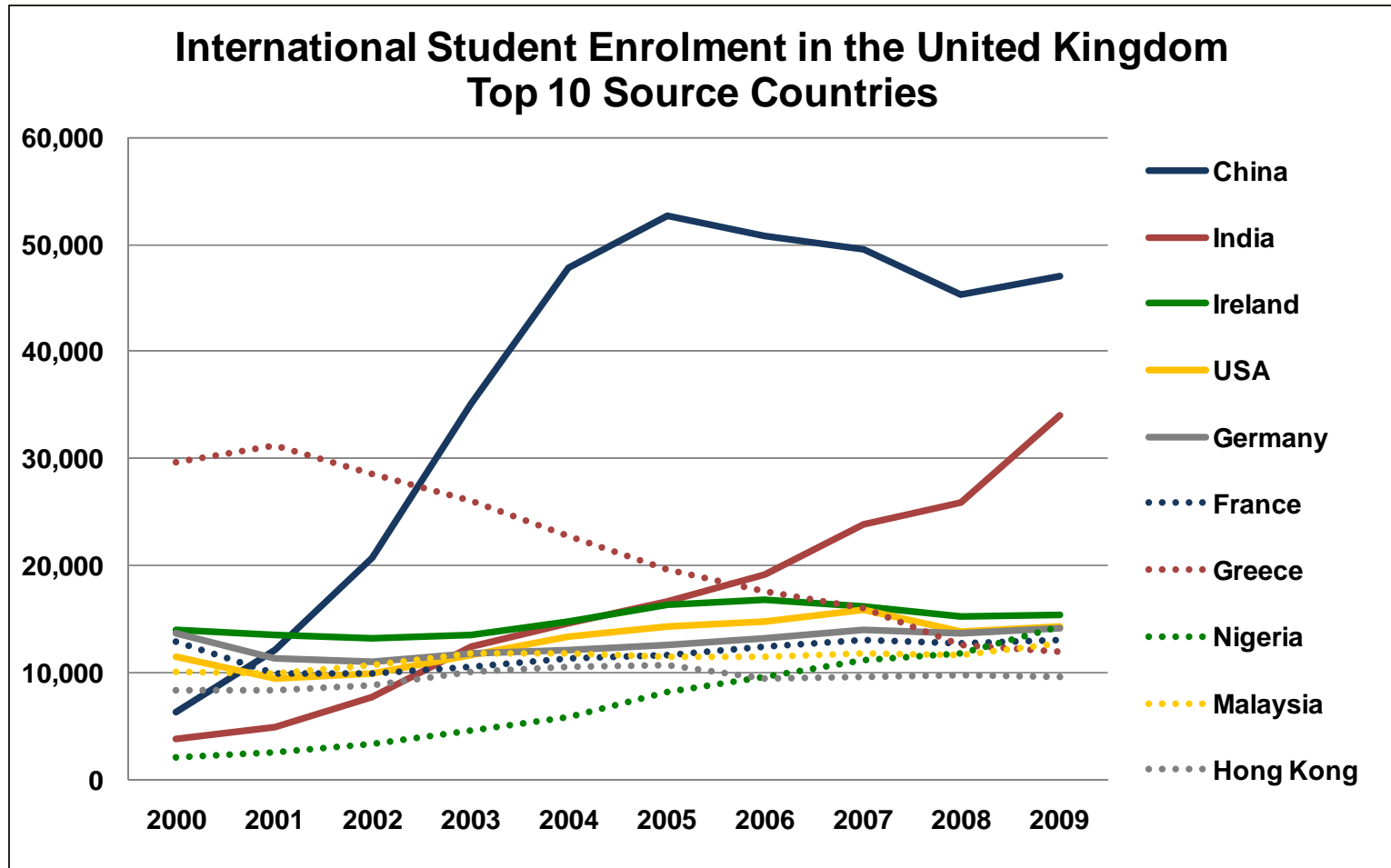
**Strong swings in growth rates**

Source: ENZ, Ministry of Education.



# UNITED KINGDOM (I)

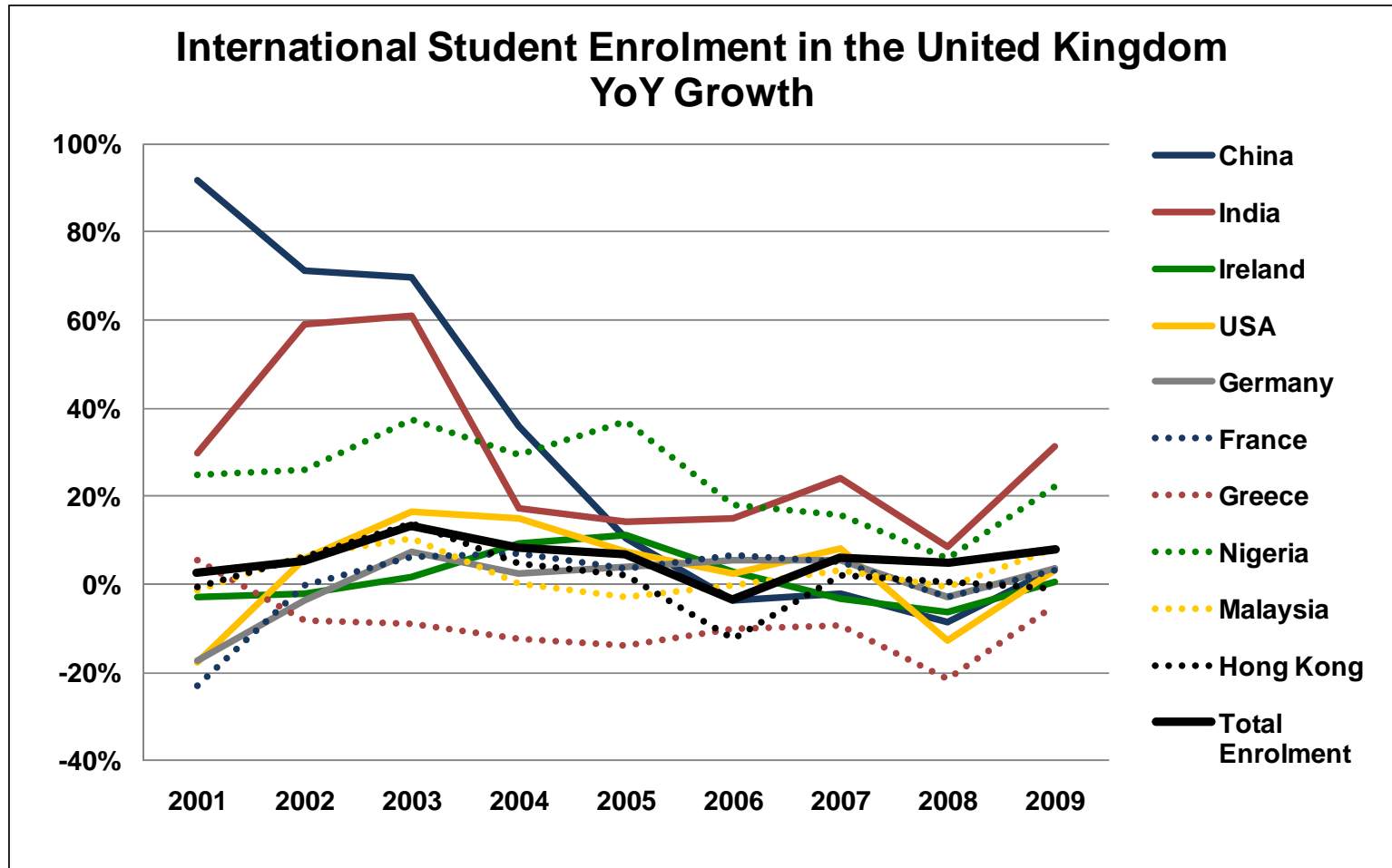
## From 224,660 to 368,970 Higher Education Students



**Diversified growth; overall growth has been driven by China and India**

## UNITED KINGDOM (II)

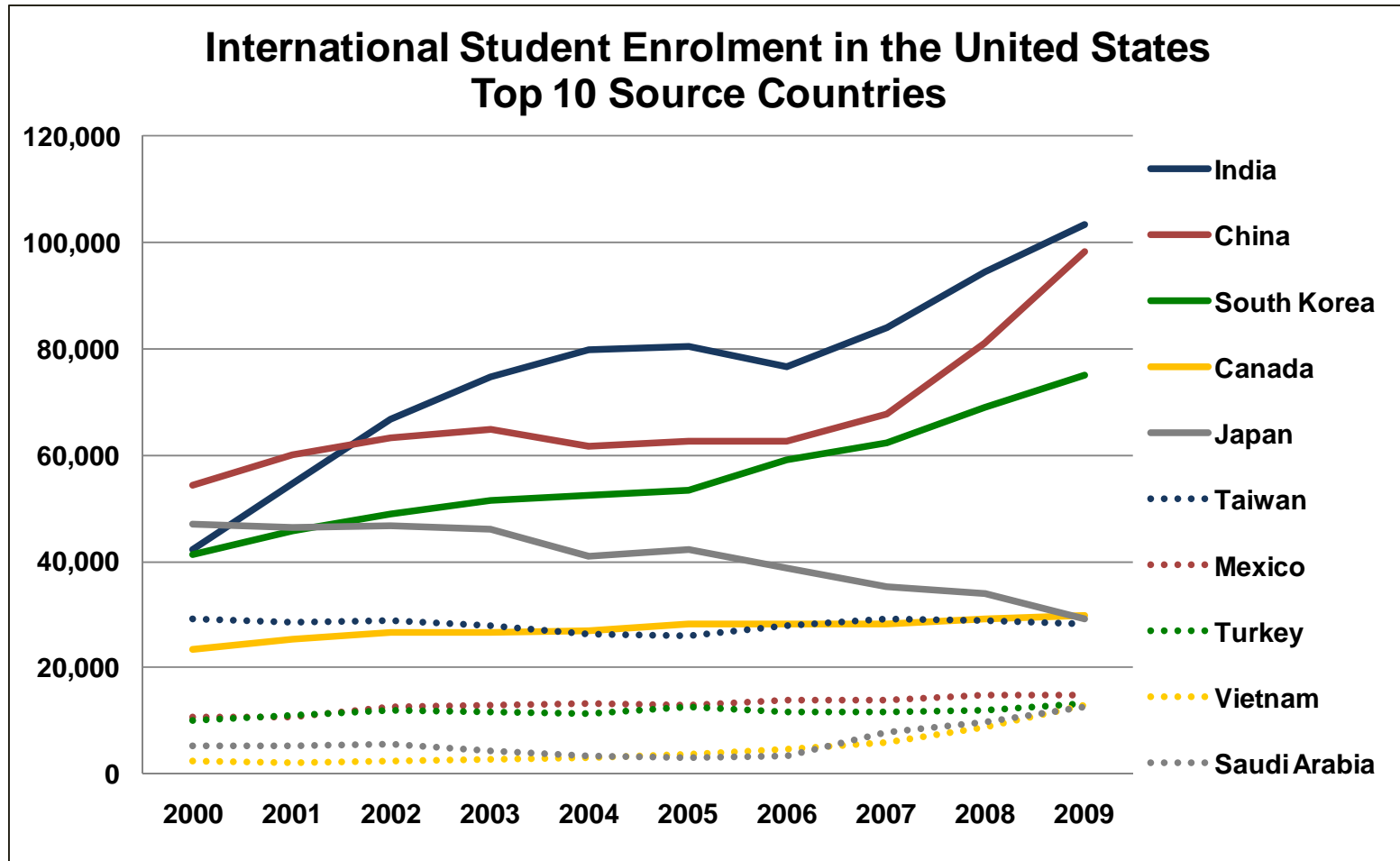
### 8.0% YoY Growth in 2008



**Overall organic growth, key source countries recovered growth in 2009**

# UNITED STATES (I)

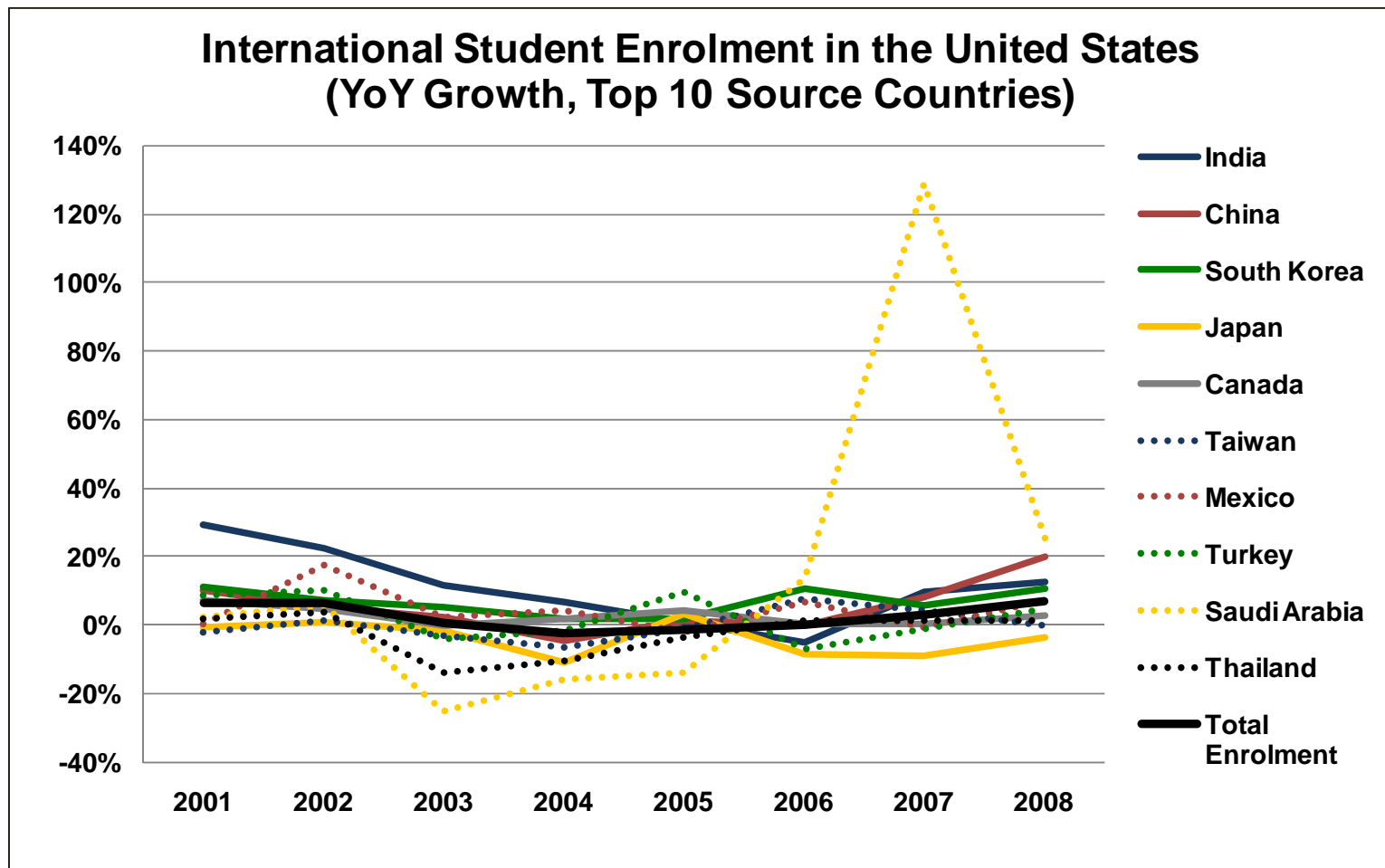
## From 514,723 to 671,616 Higher Education Students



**Growth has been driven by three countries: China, India & South Korea**

## UNITED STATES (II)

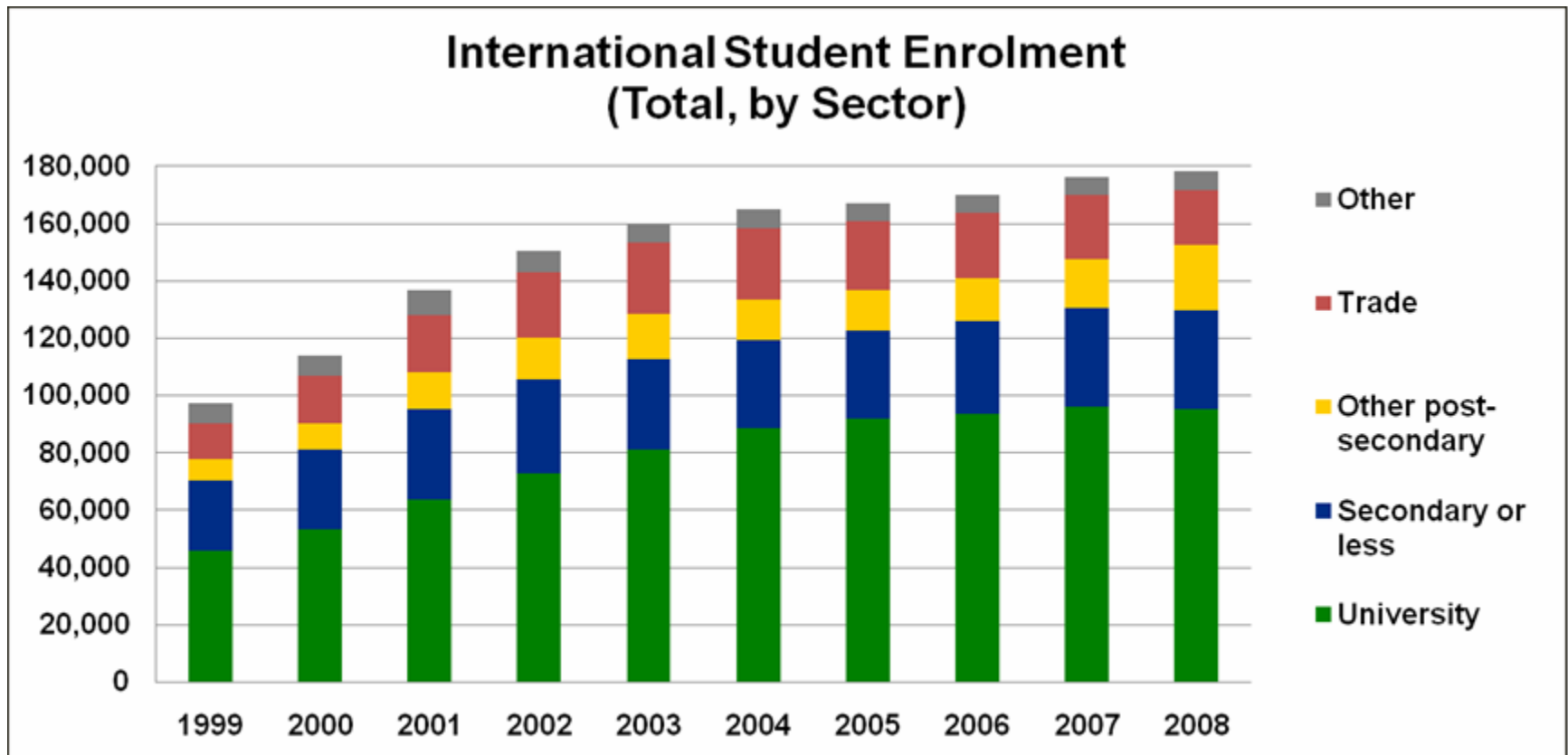
7.7% YoY Growth in 2009<sup>(1)</sup>



**Relatively stable enrolment trends; recovery since 2007**

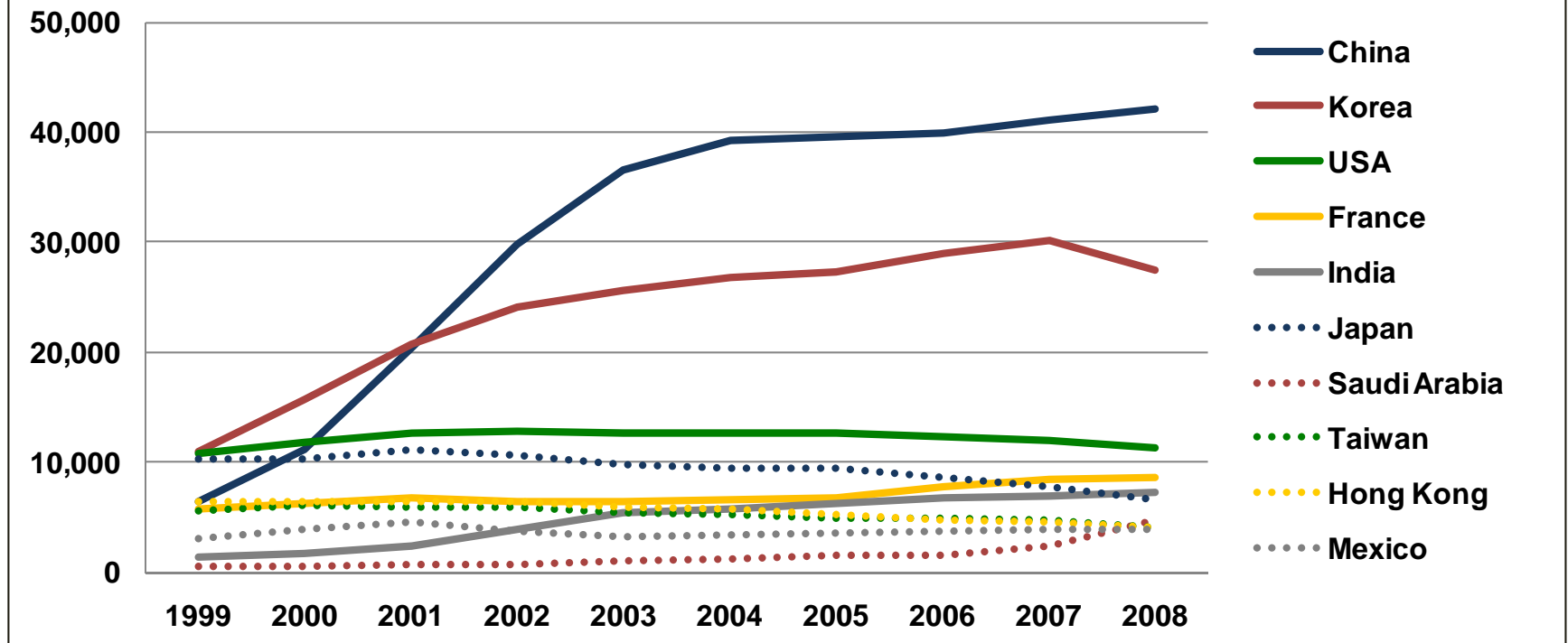
(1) IIE changed data definitions in 2008 and growth rates since have been overstated.

Source: IIE.

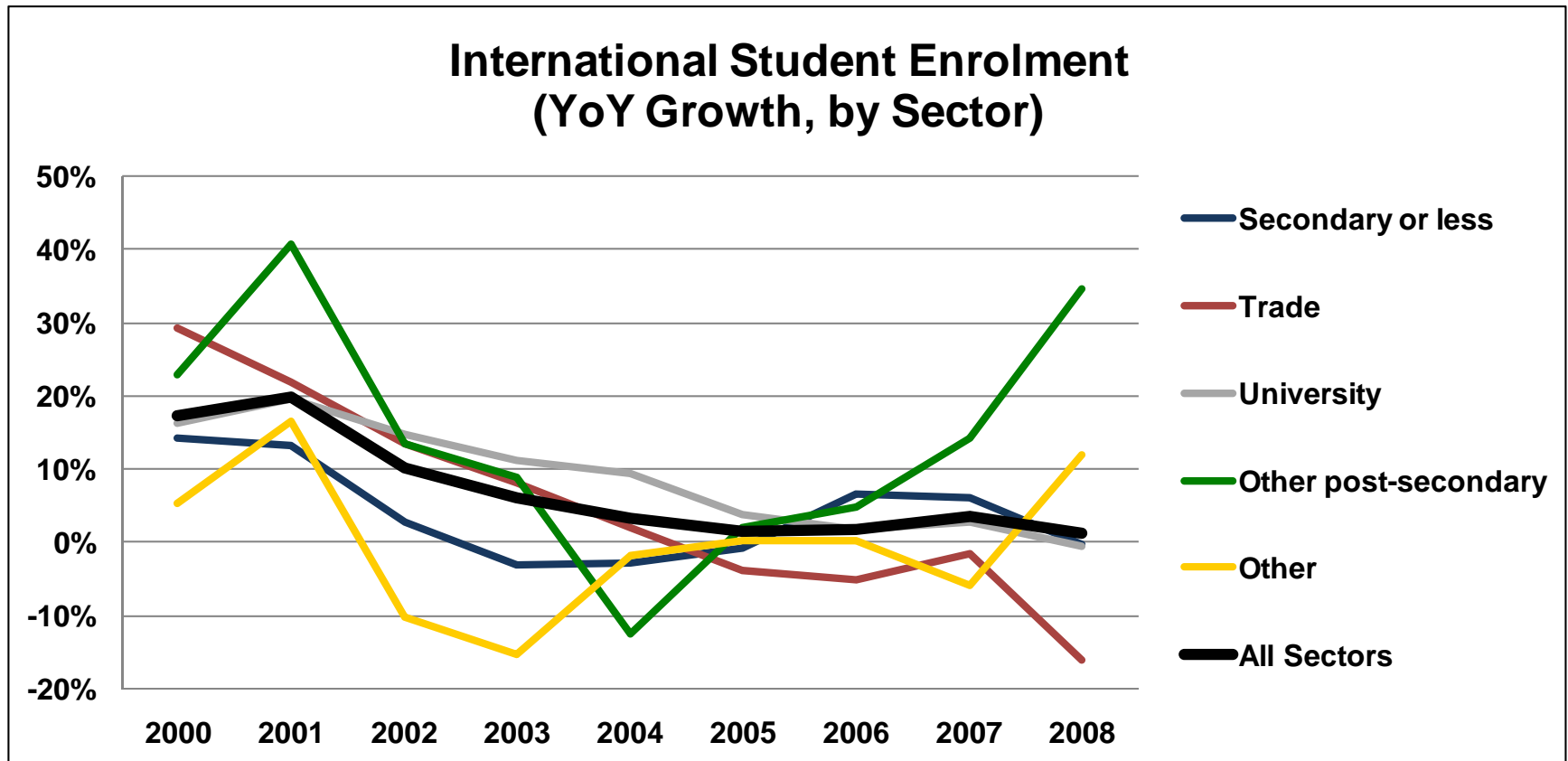


**Growth in all sectors; university sector accounted for 54% (2008)**

### International Student Enrolment (Top 10 Source Countries, all Sectors)



**Share of China and South Korea increased from 18% to 39%**



**Other post-secondary sector has been strongest performer lately**

**Growth scenario**

**Overview recruiting countries**

**Comments on new/old players**

**Private providers**

**Emerging issues**

**Social media**

**Brand Canada**

**Balanced portfolio approach**

**Quality control**



# COMMENTS ON “OLD” PLAYERS IN THE INTERNATIONAL STUDENT RECRUITING LANDSCAPE

- **Struggling**
  - Austria
  - Germany
  - France
  - Italy
  - Russia
- **Advancing**
  - Canada
  - Netherlands
  - Sweden
  - UK
  - USA
- **Key observations**
  - English language teaching is an asset
  - Anglo-Saxon cultures tend to do well
  - Size does not drive performance
  - Successful countries are home to strong higher education institutions

# COMMENTS ON “NEW” PLAYERS IN THE INTERNATIONAL STUDENT RECRUITING LANDSCAPE

- **Singapore**
  - Aggressive structural expansion (two new universities)
  - Global Schoolhouse concept has worked on the secondary level
  - Top-level research and innovation seeding has not succeeded
- **China**
  - In-coming students: ~ 220,000 (CSC)
  - Clearly emerging strategy to become talent destination
  - Intra-Asia mobility is key story line (Malaysia, Japan, South Korea)
- **Dubai**
  - A non-entity a decade ago, Dubai emerged forcefully in the 2000s
  - DIAC was focused on building labor market-focused capacity
  - The economic crash in 2008/09 has put strong pressure on DIAC and beyond
- **Saudi Arabia**
  - In-coming students: 100,000+
  - Sustained out-bound push
  - KAUST

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# **PRIVATE EDUCATION PROVIDERS**

## **A US Perspective (Because Ample Data Exists)**

- **For-profit institutions educate seven percent of the US' roughly 19 million students**
- **The for-profit education sector created revenues of USD 26 billion (2009)**
- **The for-profit sector will be a key beneficiary of the USD 12 billion plan to produce five million more two-year-college graduates over the next decade (2009)**
- **Of the roughly 3,000 for-profit institutions, 40 percent are owned by one of 13 publicly traded companies (2009)**
- **More than 90 percent of students at for-profit institutions are enrolled in degree programs. Only about 30 percent attend part time (2007)**
- **The Apollo Group's flagship University of Phoenix has grown from 25,100 students in 1995 to 455,600 (2009). The University of Phoenix runs 200 campuses in 39 states, Canada, Mexico, the Netherlands, and Puerto Rico**
- **For-profit schools charge an average of USD 14,174, compared with USD 2,544 at public two-year institutions and USD 7,020 for in-state tuition at public four-year institutions (2007)**
- **Students at for-profit institutions borrow more than students in other sectors of higher education, and have the largest student-loan default rates. But graduation rates from for-profit two-year programs run at 60 percent compared with 26 percent in the public sector**

# ENROLLMENT GROWTH AT TOP 10 PUBLICLY LISTED FOR-PROFIT HIGHER EDUCATION US COMPANIES

Company	Fall 2009 Enrollments	Growth 2008-09
Apollo Group Inc.	443,000	22%
Education Management Corp.	136,000	23%
Career Education Corp.	113,900	19%
DeVry	101,648	37%
Corinthian Colleges	93,493	26%
ITT Educational Services Inc.	79,208	29%
American Public University System	55,300	42%
Bridgepoint Education	54,894	80%
Strayer Education	54,317	22%
Grand Canyon Education	34,218	56%
Top 10 Companies	1,165,978	35%

Note: The Apollo Group operates, amongst others, the University of Phoenix.  
Source: Chronicle of Higher Education.

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- **Volatility**
- **Commercialization**
- **Rationalization**
- **Immigration-based recruiting**
- **English language teaching in non-English language countries**
- **Competition**
- **Hyper-competition**
- **Is the rise of the Gulf Region for real?**
- **Is the stumble of Australia temporary, or will it last?**

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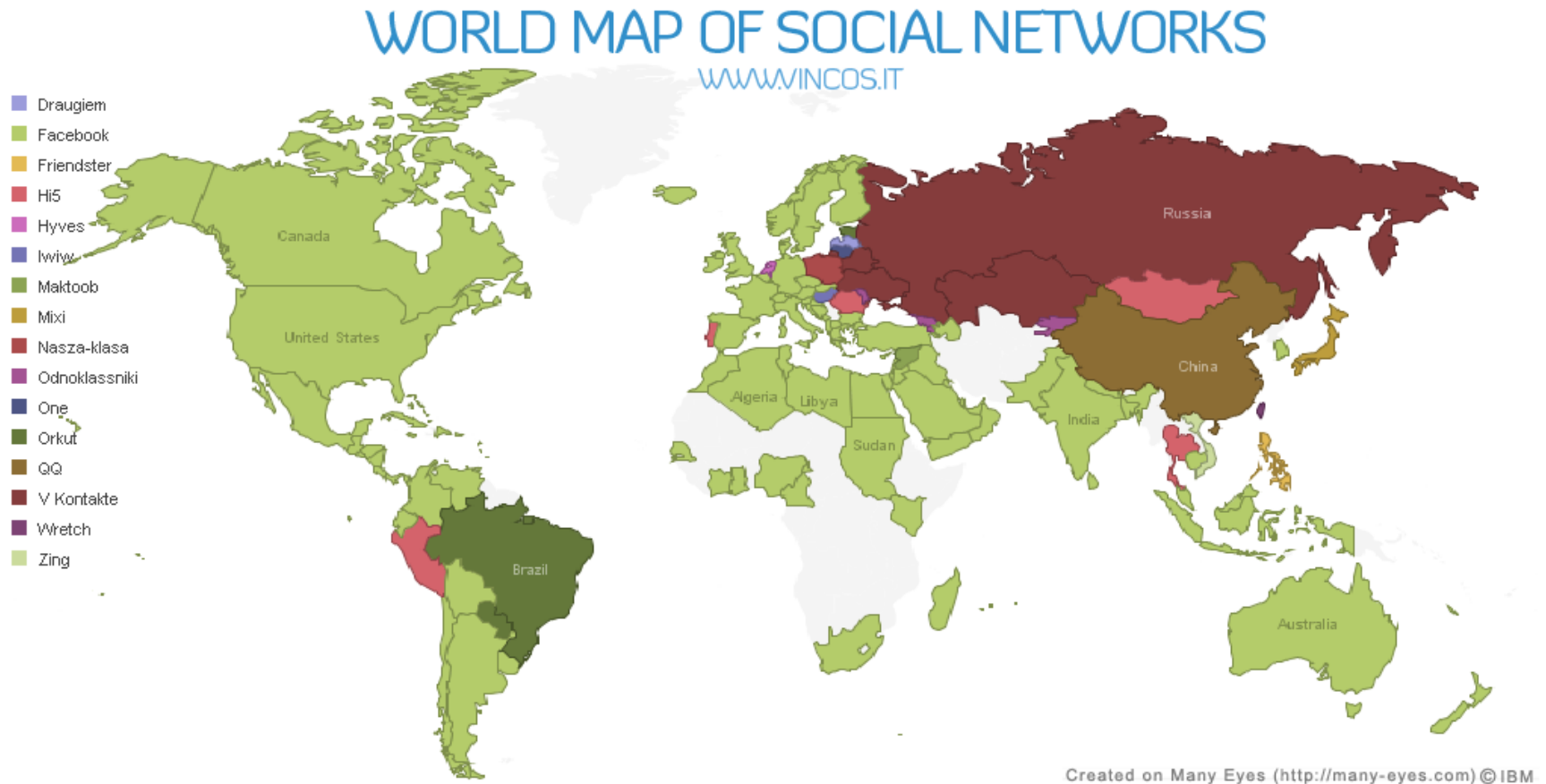
**Social media**

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**Facebook is becoming dominant – but important differences exist**

# FACEBOOK: 400 MILLION USERS


The screenshot shows the Facebook homepage for a user named Alexander Derby. The interface is divided into several sections:


- Top Navigation Bar:** Includes the Facebook logo, a search bar, and links for Home, Profile, Find Friends, and Account.
- Left Sidebar:** Contains a user profile picture and name (Alexander Derby), a 'Welcome' message, and a list of navigation links: News Feed, Messages (19), Events, Photos, Friends, Applications, Games, More, Chat with Friends, and Go Online.
- Main Content Area:**
  - Welcome to Facebook, Alexander.**
  - 1 Search your email for friends already on Facebook:** A section with a text input field containing 'dammiaccount@googlemail.com', a 'Find Friends' button, and a Gmail logo. A note states: 'Facebook will not store your password. Learn More.'
  - 2 Upload a profile picture:** A section with a large placeholder image and two options: 'Upload a Photo From your computer' and 'Take a Photo With your webcam', separated by an 'OR'.
  - 3 Fill out your profile information:** A section with the text 'Help your friends find you by filling out some basic profile information.' and an 'Edit Profile' button.
  - 4 Activate your mobile phone:** A section at the bottom of the main content area.
- Right Sidebar:**
  - Suggestions:** A section with a 'See All' link and two suggestions: Brent Cohen and Gavin Davison, each with an 'Add as friend' button.
  - Sponsored:** A section with a 'Create an Ad' link and three sponsored ads: 'L'Olimpo aspetta solo te' (with a 'Like' button), 'Bahhh, Bahhh' (with a 'Like' button), and 'Europcar' (with a 'Like' button).
- Bottom Right:** A 'Chat (Offline)' button.


**millatfacebook** Home Wall Mail Friends Members Invite Explore Settings Logout


**Welcome, Alexander!**  
<http://www.millatfacebook.com/Derby/>

**Customize Dashboard**  
Tuesday, June 1, 2010 1:28 pm


**What's New**   
[Blogs](#) [Photos](#) [Polls](#) [Videos](#)

**Promosi**  
Posted on June 1, 2010 by Cetta Adhipurusa.

**Alloh, Jaga Palestina ku..**  
Posted on June 1, 2010 by Nur Sri Ubaya Asri.


**Islam dan Problem Kepemimpinan**  
Posted on June 1, 2010 by Roni Hardian Putra.


**Home**  
[Quick Links](#) [Account Info](#) [Activity](#)





**Connect With Friends**  
To find people you know who are already using MillatFacebook, check out the Friend Finder.







**Bulletins**

**Solution if You're experiencing MFB SLOW**  
Posted on June 1, 2010 by Omer Zaheer Meer.

**Solution if You're experiencing MFB SLOW**  
Posted on June 1, 2010 by Omer Zaheer Meer.

**Today is my BIRTHDAY**  
Posted on June 1, 2010 by seemi\_mano.

**Israel declared as a lunatic state**

 MillatFacebook.com   Chat (0)   1:28 pm 

mixi 

会社の仲間と、つながろう。

ホーム ミクシィについて 新規登録 より健全なSNSを目指して ヘルプ

はじめよう。 mixiは、友人の近況がわかったり、  
便利で楽しいたくさんの「アプリ」を  
友人と一緒に楽しめる、  
「SNS」というサービスです。

 mixi

いまずく利用する (無料)

 友人の日記  数百種類のアプリ  友人の写真  
が読める。 で楽しめる。 がえられる。

 同級生が みつける、つながる。...などなど

mixi でなにができるの?

PCでも、ケータイでも。

すでに登録済みの方は、  
こちらからログインしてください

ログインメールアドレス  
|  
パスワード

☐ 次回から自動的にログイン

[※パスワードを忘れた方はこちら](#)

ログイン

[SSL \(https\)はこちら](#)



# ORKUT: STRONG IN INDIA (AND BRAZIL)

The screenshot shows the Orkut user interface. At the top is a navigation bar with 'orkut' logo, 'Home', 'Scrapbook', 'Friends', and 'Communities'. On the right of the bar are 'Happy Diwali!', a user email 'mailork@gmail.com', a 'Logout' link, and a search bar labeled 'search orkut'. The main profile area for 'Ram' includes a profile picture, a 'Welcome, Ram' message, and statistics: 'scraps 2,214', 'photos 2', 'fans 51', and 'messages 0'. Below this, it says 'Profile views: Since Feb '06: 3,301, Last week: 11' and 'Today's fortune: The great pleasure in life is doing what people say you cannot do'. A yellow box contains a 'New!' announcement about asking friends for advice. Another yellow box says 'New!' about adding 'Hindi' to the 'languages i speak' field. To the left of the main content is a sidebar with a 'Fast Appearance' section (male, single, NOIDA, India) and a list of links: 'edit profile', 'profile', 'scrapbook', 'album', 'videos', 'New York Hack', 'add stuff', 'lists', 'messages', 'testimonials', 'updates', and 'settings'. Below the main content is an 'invite friends' section with an 'email addresses' input field. To the right of the main content are two sections: 'my friends (188)' showing a grid of friend avatars, and 'my communities (30)' showing a grid of community avatars. At the bottom of the main content area is an 'updates from your friends' section with a video player showing a sequence of frames.

orkut Home Scrapbook Friends Communities Happy Diwali! mailork@gmail.com Logout search orkut

Welcome, Ram

scraps 2,214 photos 2 fans 51 messages 0

Profile views: Since Feb '06: 3,301, Last week: 11

Today's fortune: The great pleasure in life is doing what people say you cannot do

**New!** Have a question you'd like to ask a friend or group of friends on orkut? Want to seek and share advice, knowledge, recommendations or plans in private? Try [ask friends](#), [click here](#) »

**New!** Add "Hindi" to the "languages i speak" field in your [profile](#) to **type your scraps in Hindi**. [Click here](#) to learn more.

Fast Appearance: male, single NOIDA, India

edit profile

profile

scrapbook

album

videos

New York Hack

add stuff

lists

messages

testimonials

updates

settings

invite friends

email addresses

upcoming birthdays

updates from your friends

my friends (188)

my communities (30)

The screenshot shows the QQ.com homepage with a green and white color scheme. At the top, there's a banner for the 2010 South Africa World Cup with the text "2010 南非·世界杯 精彩在线 我在场". Below the banner is a navigation bar with links for News, Blog, Forum, etc. A weather widget shows 24°C in Beijing. A search bar with the Soso logo is present. The main content area is divided into several sections: a left sidebar with links to various QQ services, a central area with a TT browser advertisement and a "Today's Topics" section, and a right sidebar with product promotions like t-shirts and watches. The "Today's Topics" section lists news items related to the World Cup and other events.

**2010 南非·世界杯 精彩在线 我在场**

新闻 博客 论坛 评论 财经 证券 港股 基金 娱乐 明星 电影 音乐 体育 NBA 彩票 世界杯 汽车 房产 家居 家电 科技 数码 手机 下载 女性 情感 育儿 时尚 购物 旅游 读书 教育 高考 出国 游戏 动漫 动画 星座 视频 直播 图片 世博 公益 儿童

24°C 北京

SOSO 搜索

今日话题

发改委：楼市游资炒作与媒体效应导致物价大涨  
 全总要求加强青年心理疏导 提高一线职工报酬  
 温家宝：必须尽一切努力维护东亚和平与稳定  
 朝鲜举行10万群众集会谴责韩国伪造天安号事件  
 《金融时报》全球五百强企业排名出炉 中石油登顶  
 印度火车脱轨141人遇难 铁道部长称是政治阴谋  
 胡锦涛：确保基本药价格合理 使群众看得起病  
 美股5月份跌近8% 英国陷财政危机担心成下个希腊

南非世界杯

热身赛-正在图文直播英格兰vs日本  
 西班牙3-2险胜沙特 德国3-0匈牙利

超值热卖 放心正品 最热卖场

夏日海边 必备SPEEDO 全场1折起 正品低价

时尚手表大全 全场3-4折 官方认证商家 请放心购买!

小熊冰淇淋机 高速搅拌 定制冰爽 密酿舌尖的甜美

教育 培训 招生 出国

轻松择校 前途无忧!  
 中国海洋大学欢迎您!



The screenshot shows the Wretch website (無名小站) interface. At the top, there's a rainbow logo and navigation links: Album, Blog, Video, Find, Digu, and Join. A search bar is also present. Below the navigation, there's a message section with a user profile 'ace7391303' and a 'Leave a message' button. The main content area features a 'Hot Album' section with four user avatars and their names: nice444888, coti, goldenfocus, and jessebibi. To the right, there's a 'Hi, Not Login' section with 'Login' and 'Sign up' buttons, and a 'Take A Join Page Tour' section. At the bottom, there's a banner for '把相簿變影片' (Turn photo album into video) and a news section with the headline '我們的希望地圖'.

無名小站

Album Blog Video Find Digu Join

Help Yahoo! Join VIP

Girl Food Movie Art Celebrity MenStyle Beauty

Search

Message ace7391303 要對大家說：帥哥受傷了!想找個人來療傷或來打打氣

Hot Album

無名人氣相簿精選

無名精選正妹相簿

nice444888  
光頭一樣很有型

coti  
還是家裡讓人最自在

goldenfocus  
簡單是最好的打扮

jessebibi  
嘗試不同的造型

PK 正妹最愛的美食大集合都在無名美食

更多人氣相簿 More Album

把相簿變影片

News 我們的希望地圖

More News

Hi, Not Login

Login

Sign up

Take A Join Page Tour

Play music automatically: Off On

Announce

[公告]各服務「分享」功能上線

[公告]請移除侵權影音內容

[公告]誰來我家檢舉功能上線

More Announce

全台灣約有  
3363 家民宿

# POPULARITY OF LEADING WEB 2.0 PLATFORMS AND ONLINE COMMUNITIES IN ASIA

Platform	Popularity in Asia
• facebook.com	Taking over Asian market
• friendster.com	Popular in Southeast Asia
• linkedIn.com	Popular in India only
• twitter.com	India, Japan and Indonesia among top 10 user countries
• flickr.com	Some India, Japan
• orkut.com	India and Japan
• qq.com	China
• hi5.com	Thailand and India
• renren.com	China, some other Asian countries
• wordpress.org	India, China, Pakistan
• mixi.jp	Japan



# SOCIAL NETWORKING REACH IN ASIA-PACIFIC

Country	Percentage Reach	Average Minutes per Visitor	Average Visits per Visitor
Philippines	90.3	332.2	26.3
<i>Australia</i>	89.6	228.0	20.9
Indonesia	88.6	324.4	22.6
Malaysia	84.7	226.0	22.3
Singapore	83.7	220.9	22.1
<i>New Zealand</i>	81.2	217.5	20.3
Taiwan	75.9	131.3	18.3
Hong Kong	75.4	223.3	25.4
India	68.5	130.1	13.0
South Korea	63.5	131.4	16.0
Vietnam	46.1	49.5	7.2
<i>Japan</i>	42.3	120.5	14.0
Asia Pacific Average	50.8	148.9	15.1

Note: Data denote total Internet audience, age 15 plus, at home and work locations (no public places such as Internet cafes).

Source: comScore World Metrics (April 2010).

# TOP SOCIAL NETWORKS IN ASIA-PACIFIC

## By Percent Reach of Web Population

Country	Top Social Network in Market	Percent Reach of Web Population
Australia	Facebook	69.4%
Hong Kong	Facebook	62.6%
India	Orkut	46.8%
Indonesia	Facebook	84.9%
Japan	Mixi	18.9%
Malaysia	Facebook	77.5%
New Zealand	Facebook	63.6%
Philippines	Facebook	84.5%
Singapore	Facebook	72.1%
South Korea	CyWorld	54.2%
Taiwan	Wretch	62.5%
Vietnam	Facebook	18.4%
Asia Pacific	Facebook	14.9%

Note: Data denote total Internet audience, age 15 plus, at home and work locations (no public places such as Internet cafes).

Source: comScore World Metrics (April 2010).

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**Brand Canada**

**Balanced portfolio approach**

**Quality control**



- **The introduction of the brand was a major step forward**
- **Many of the standard components are in place**
- **Some improvement areas remain**
- **The usage of the brand has in many ways just begun**
- **Colleges should be amongst the key beneficiaries of using the brand**
- **The Canada pavilion at NAFSA was amongst the best three country presences in 2010**

**Growth scenario**

**Overview recruiting countries**

**Comments on new/old players**

**Private providers**

**Emerging issues**

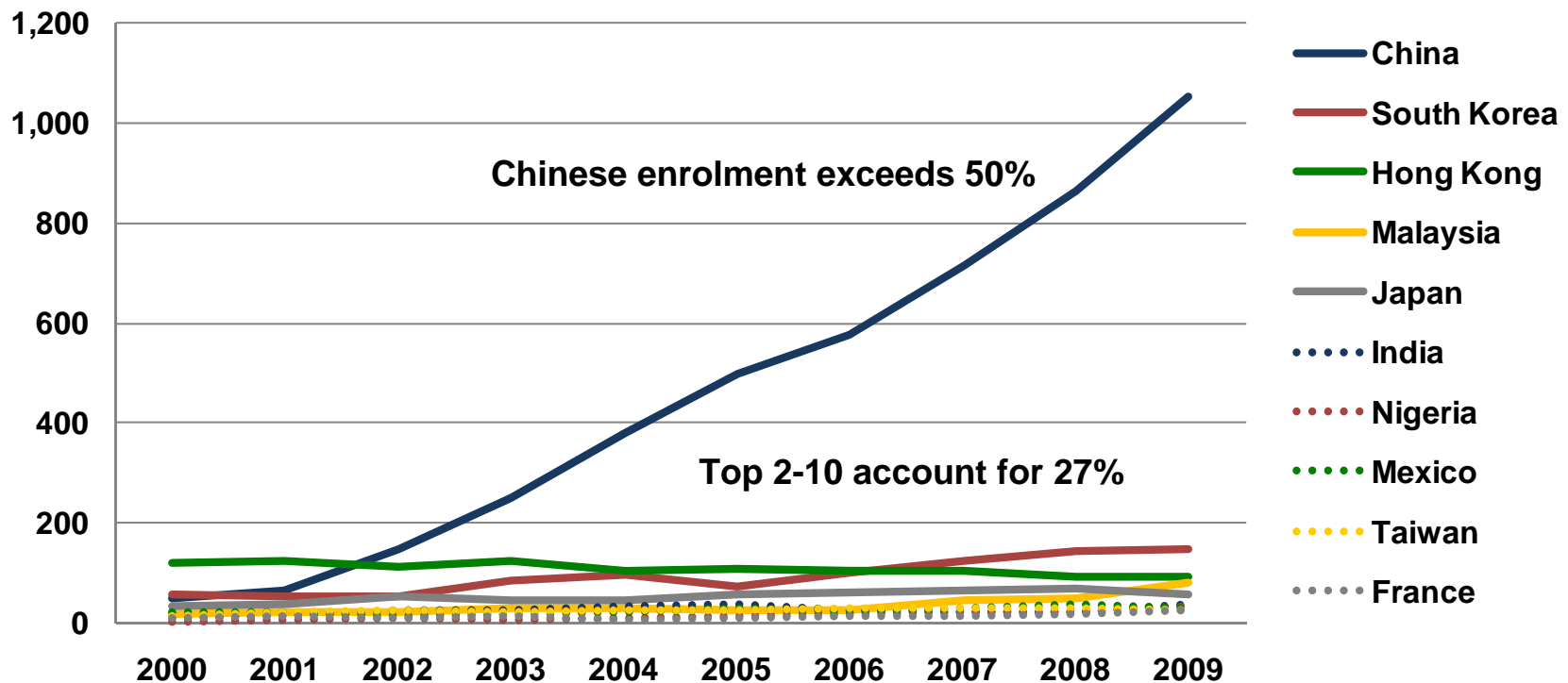
**Social media**

**Brand Canada**

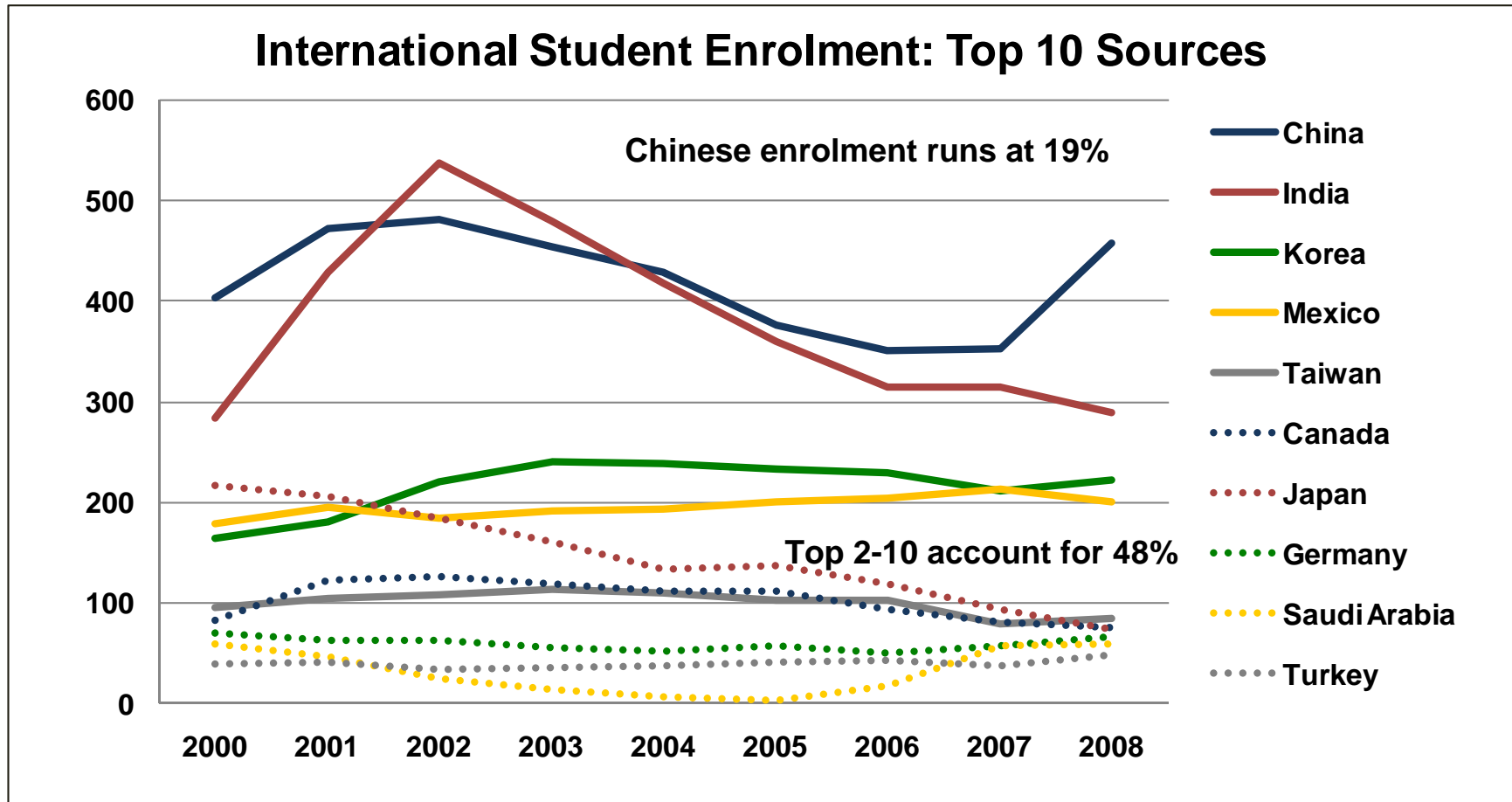
**Balanced portfolio approach**

**Quality control**

## International UG Student Enrolment: Top 10 Source Countries



**Highly elevated structural risk**



**Sets of second-tier and third-tier countries create a technical balance**



- **What are hallmarks of a balanced recruiting portfolio?**
  - Sustainability – built for the long-term
  - Multi-modal (exchanges, direct recruiting, etc.)
  - Multi-channel recruiting (academic, agents, Web 2.0, alumni, etc.)
- **What are drivers for an imbalanced recruiting portfolio?**
  - A few dominant sending countries (China, India, South Korea)
  - Economies of scale can look attractive
  - Income-based considerations dominate
- **Technical aspects**
  - Leading single source does not exceed one-third of enrolment
  - Top 3 sources do not exceed one-half of enrolment
  - Strong set of “second-tier” countries at 5-10% enrolment each
  - Emerging and declining countries (at least) balance out

**Growth scenario**

**Overview recruiting countries**

**Comments on new/old players**

**Private providers**

**Emerging issues**

**Social media**

**Brand Canada**

**Balanced portfolio approach**

**Quality control**

- **Growth in international education has resulted not just in more international students, but also in a more complex, differentiated overall landscape**
- **On the student side, a segment of “pay-for-credential” has emerged which is proving challenging for educational providers**
- **In highly commercialized systems, providers many times put income considerations before delivery quality**
- **Self-regulation has proven challenging, as have overly regulatory systems which induce avoidance behavior**
- **For Canada’s colleges, maintaining teaching/delivery quality is essential in order to not replicate the Australian experience**

## **Positioning Canada**

**Recruiting tools**

**The issue of "college"**

**Academic Brand Matrix**

**Perceptions of Canada**

**Value-added recruiting**

- **Coordination (from a fragmented to a focused promotion landscape)**
- **Professionalization (general global trend)**
- **Intelligence acquisition (kind, source, cost)**
- **Culture shift (commercialization, competition)**
- **Overall resourcing (federal, provincial, institutional)**
- **Revenue raising (coming back to a levy model)**
- **Delivery model (being discussed)**

**Drivers – external competition and student preferences)**

**Positioning Canada**

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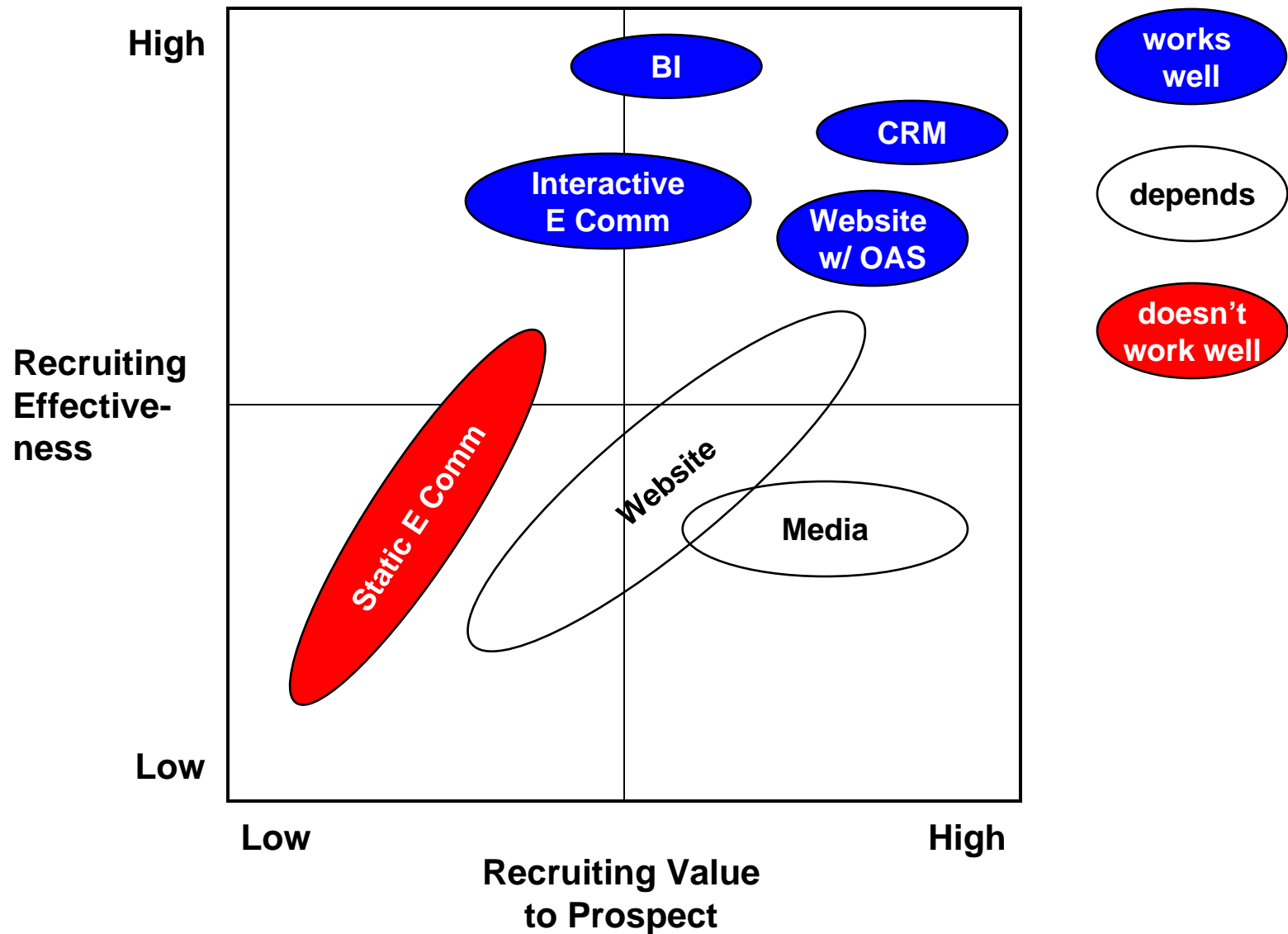
**Value-added recruiting**

**The following discussion places 35 international student recruiting tools based on their effectiveness for the institution, and their value for a prospective student, in a strategy matrix:**

- **Seven marketing tools**
- **Eight relationship-based approaches**
- **Eight leverage-based approaches**
- **Seven return on investment approaches**
- **Five academic branding approaches**

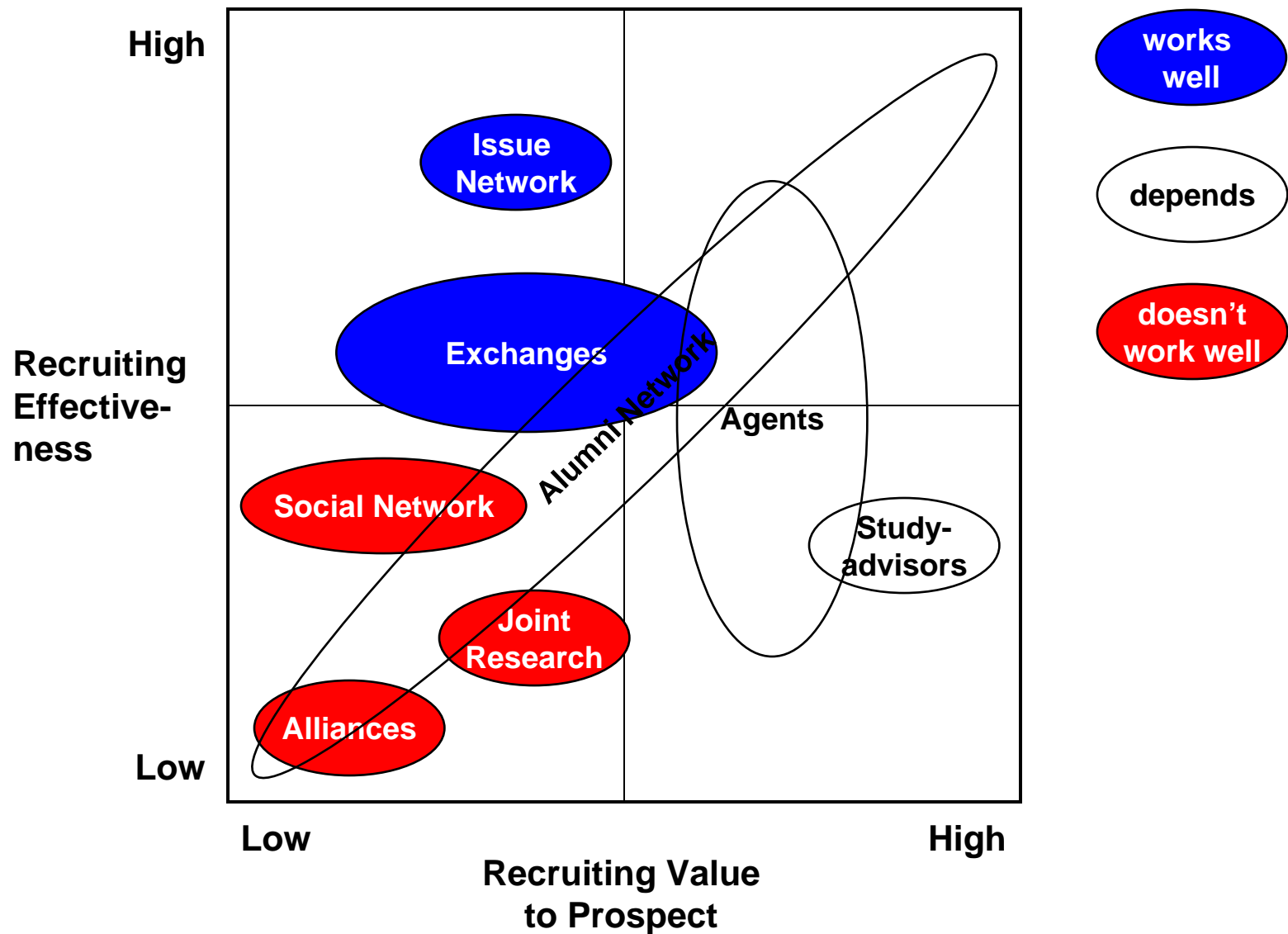
**Each tool has eight components which define its utility, direction, and value to the institution. Websites are used as one example to illuminate the need for understanding each component of each tool.**

**The aim of this discussion is to highlight structural and strategic aspects of what works and what does not work in international student recruiting.**

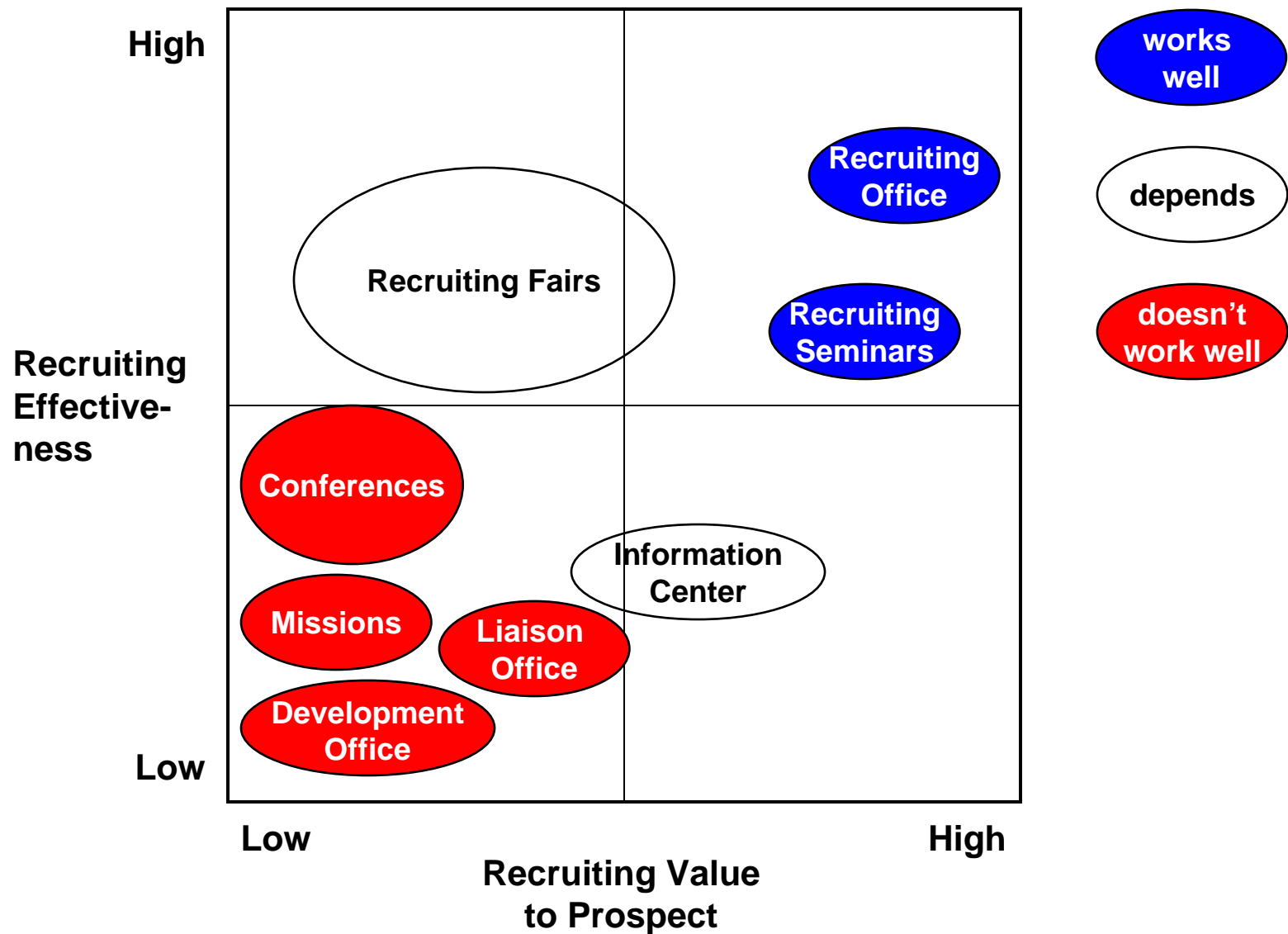




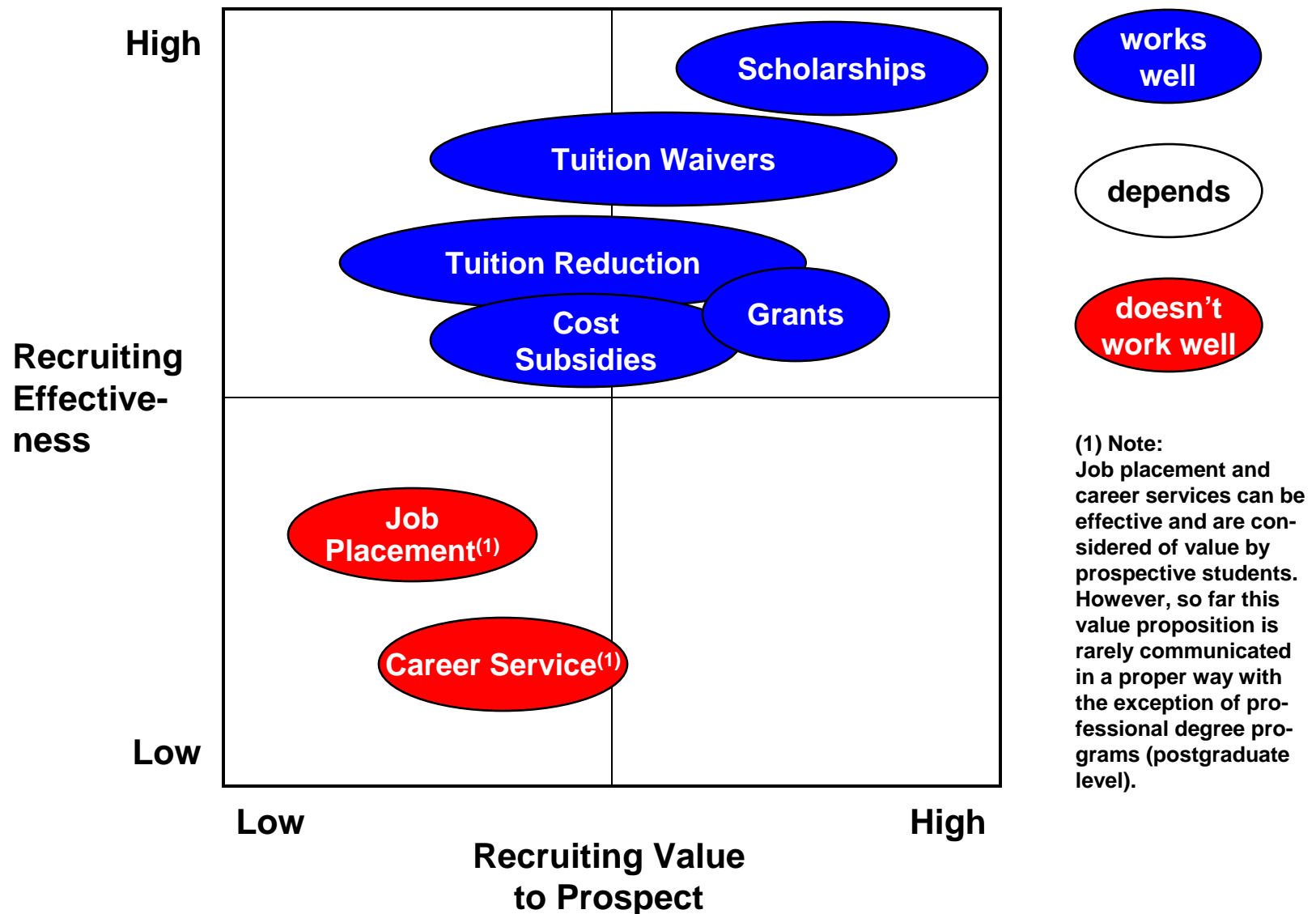
# RELATIONSHIP-BASED APPROACHES



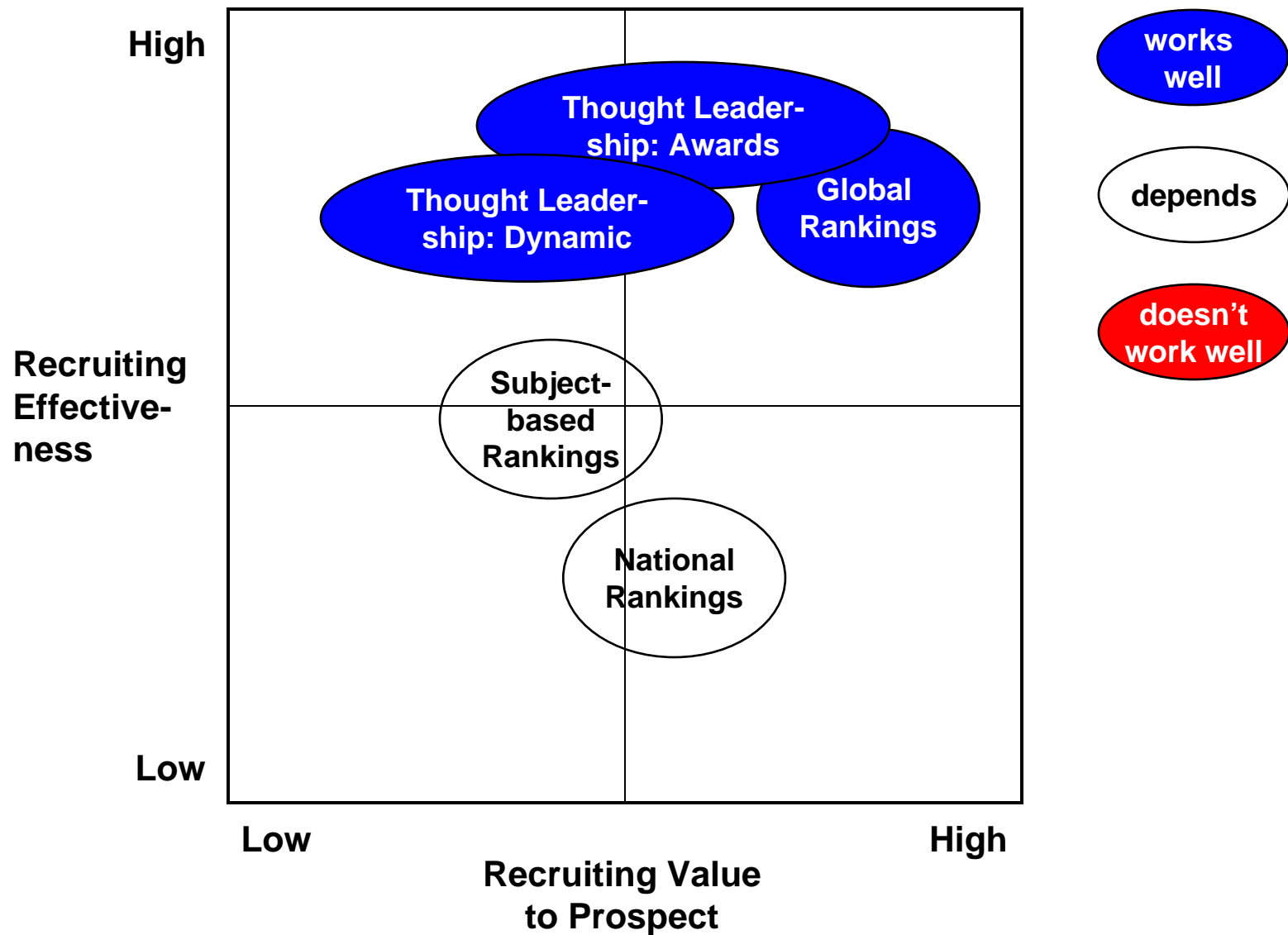
# LEVERAGE-BASED APPROACHES



# RETURN ON INVESTMENT APPROACHES



# ACADEMIC BRANDING APPROACHES



**Positioning Canada**

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**Value-added recruiting**

- **College as a term has a history to be subject to in-country interpretation and contextualization**
- **This can be a challenge in certain countries which equate college with a lesser form of higher education, or an a priori lower degree of desirability**
- **Responses around the world have been movements towards re-labeling (UK, Germany, Sweden, and on some level in the US)**
- **Even at an elite level, the term “college” can cause issue (i.e. Imperial College London)**
- **There does not appear to be a definitive answer to over-coming this issue. However, an active brand positioning, coupled with clear in-country communication, should be able to address many of the misunderstandings**

**Positioning Canada**

**Recruiting tools**

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**Academic Brand Matrix**

**Perceptions of Canada**

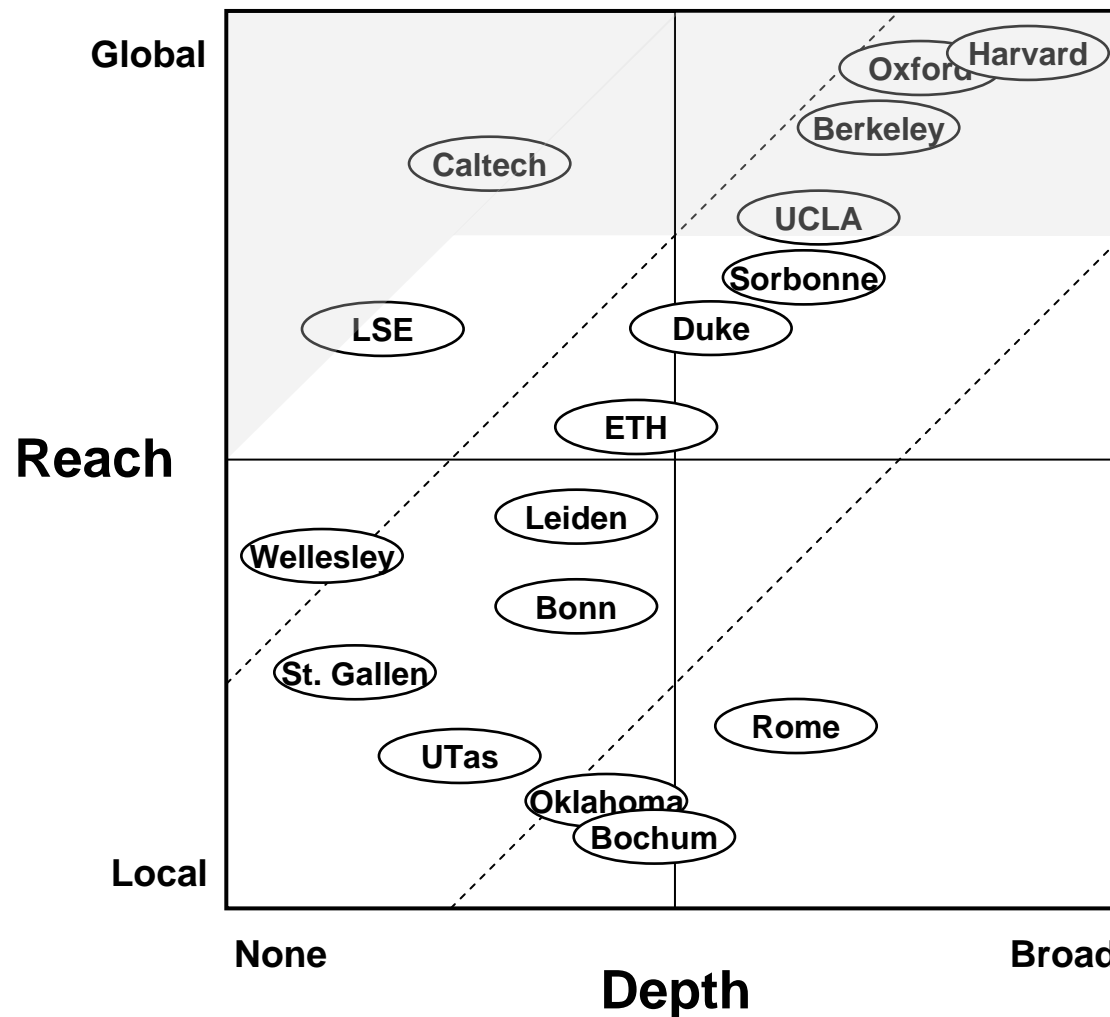
**Value-added recruiting**

# BRANDING IN THE ACADEMIC WORLD: INTRODUCTION

- Professional, active academic branding is a relatively recent phenomenon. Yet competition for talent, funding, and attention has led to a strong acceleration of branding activities
- Higher education institutions are both complex as well as granular – this makes a unified brand positioning approach difficult
- Many faculty members – and entire academic cultures – still resist branding in the academic world. This is nothing short of naive. Academic branding is real, it is important, and it will not go away
- Branding in academia is often mis- or only partially understood. It is not just a logo (“crest”), slogan (“world class”), or a ranking (THES vs. Shanghai). It certainly is not simply based on academic reputation alone, though reputation underpins much of the an academic brand



# ACADEMIC BRAND MATRIX – MEASURING AN INSTITUTIONS EXTERNAL PERCEPTION-BASED POSITION



Notes: The definition for the reach and depth axes is included in subsequent slides

Source: ICG.

# ABOUT THE ACADEMIC BRAND MATRIX I

- **Axes**
  - Reach is broadly defined by geographic reach as measured by the level of general public awareness of a given academic brand
  - Depth is defined by a combination of seven criteria: academic performance, innovation, financial strength, leadership, social/cultural contributions, athletics, and marketing/ positioning efforts
- **Factors**
  - Quantitative (most)
  - Qualitative transformed into quantitative (some)
  - Qualitative (a few)
- **Placement**
  - An institution's position is driven by both axes. Regarding the depth axis, the Academic Brand Matrix allows for customization (weighting)
- **Competitive Aspect**
  - The Academic Brand Matrix's main use is to establish an institution's relative, competitive position – and to highlight brand development pathways

**The Academic Brand Matrix is a conceptual and competition tool**

- **Internal world**
  - **Everyone**
- **External world**
  - **Alumni and friends**
  - **Applicants**
  - **Communities and networks (online and offline)**
  - **Employers**
  - **Experts (rankings, assessments, etc.)**
  - **Faculty members**
  - **Government**
  - **Influencers**
  - **Media**
  - **Peer and competitor institutions**
  - **Prospects**
  - **Staff members**
  - **Students**

**The outside world matters (more)**

# BEST PRACTICE INTERNATIONAL BRAND LEVERAGE MODEL



**Positioning Canada**

**Recruiting tools**

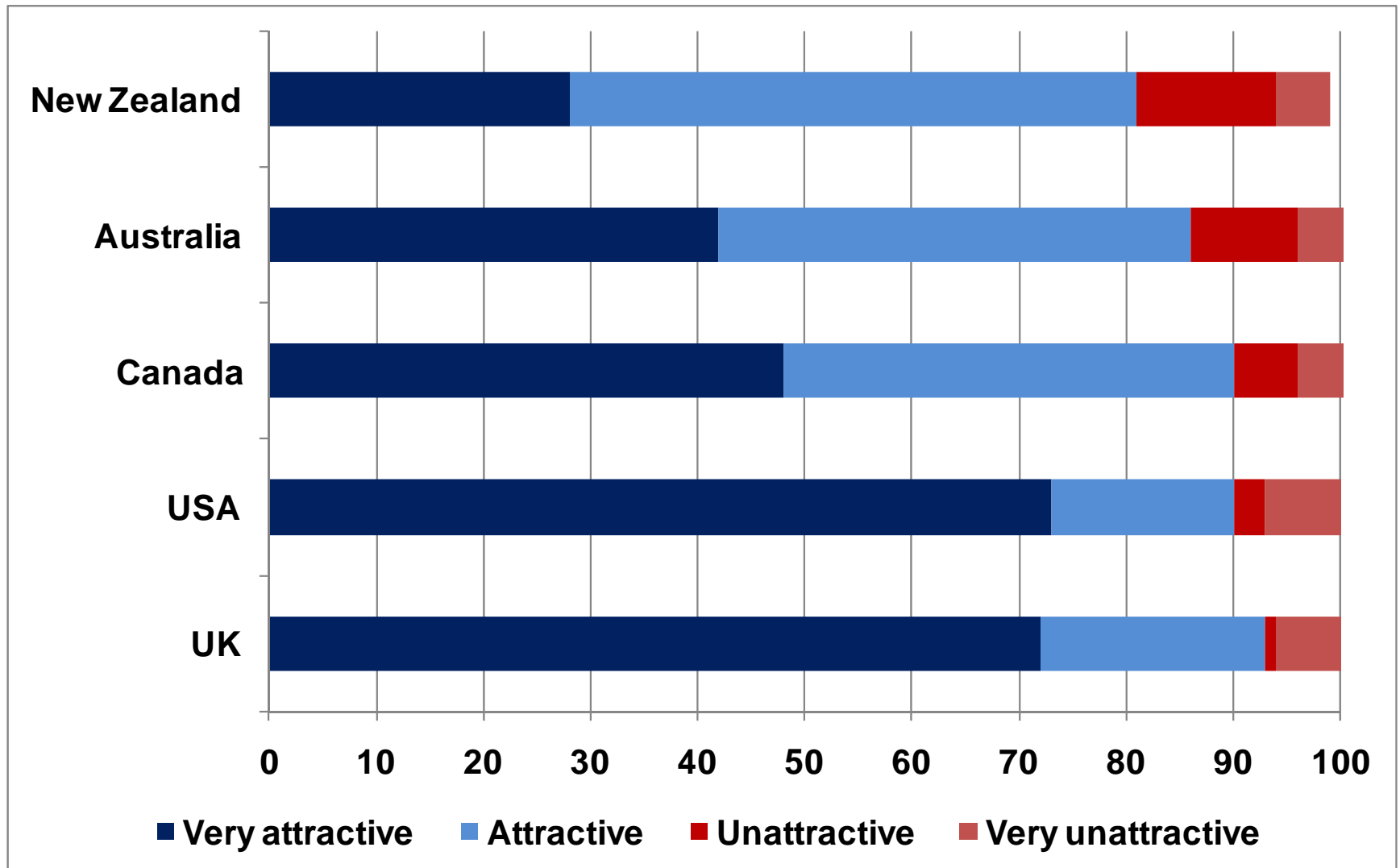
**The issue of "college"**

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# PERCEPTION OF CANADA – Overall Attractiveness as a Study Destination



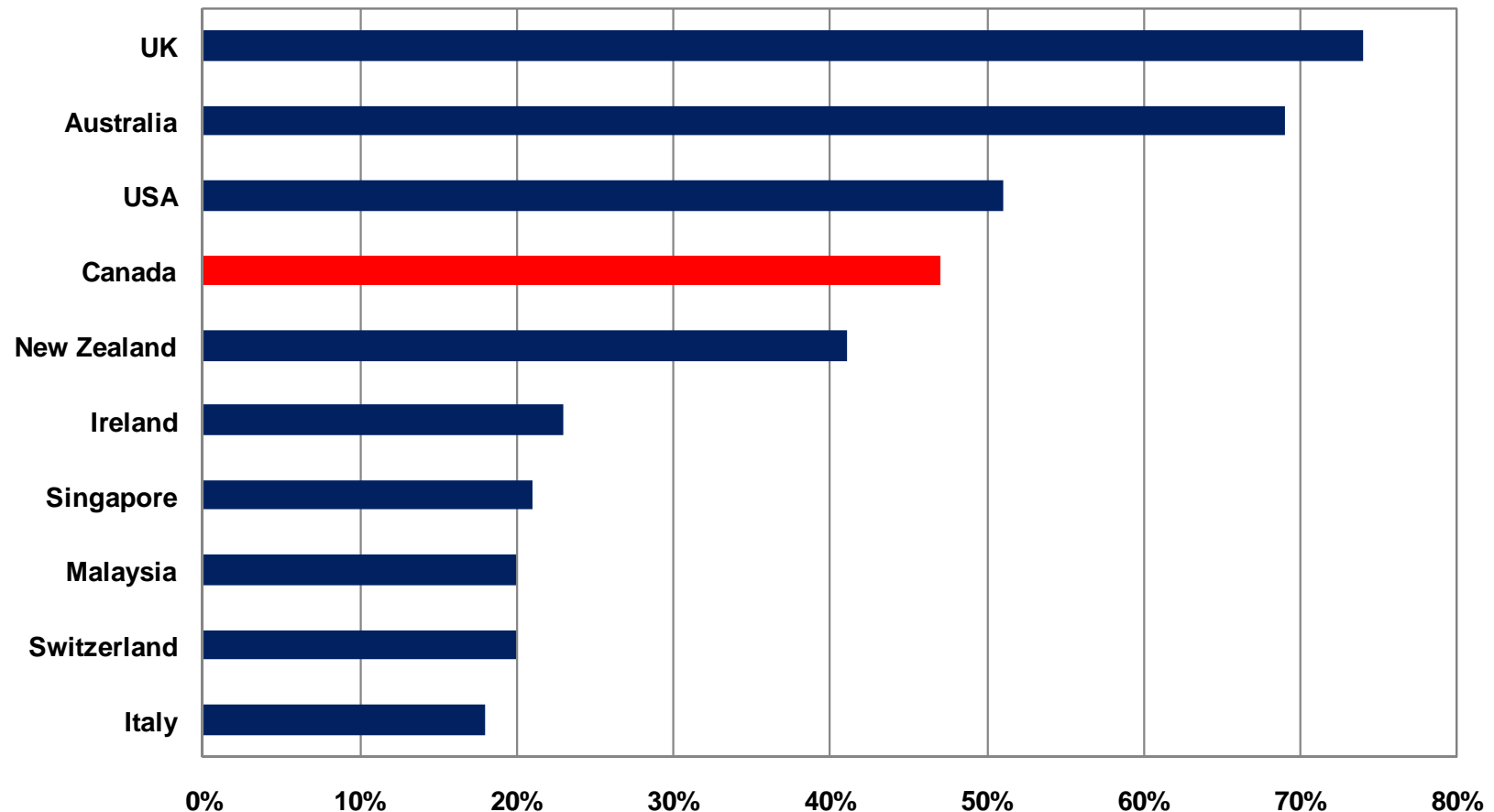
Notes: Sample size is 1,033 agents in 110 countries.

Source: ICEF Agent Barometer, September 2009.

# PERCEPTION OF CANADA

## VET Sector Destination

### Top Placement Destinations - VET Sector



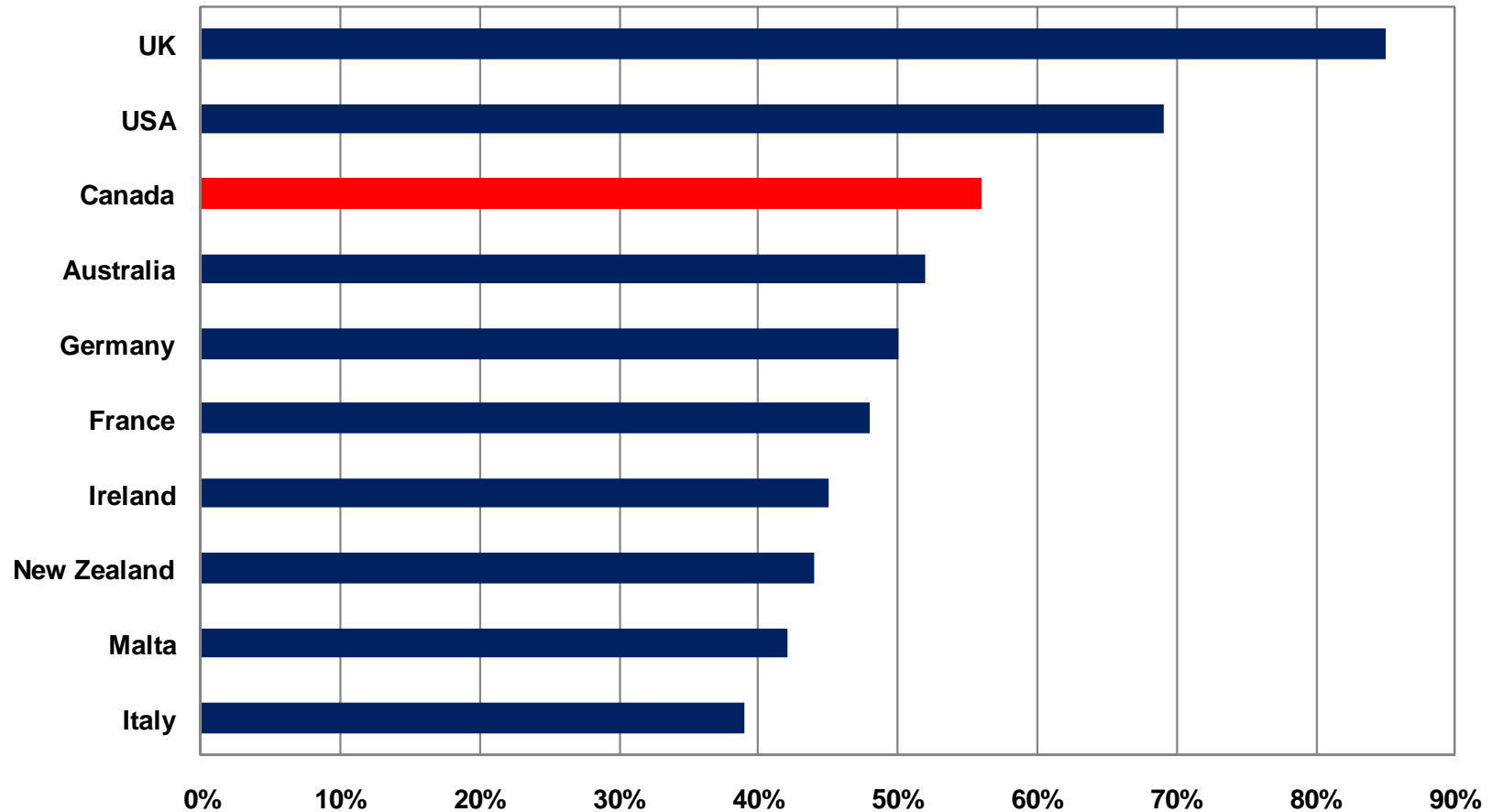
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# PERCEPTION OF CANADA

## Language Sector Destination

### Top Placement Destinations - Language Courses



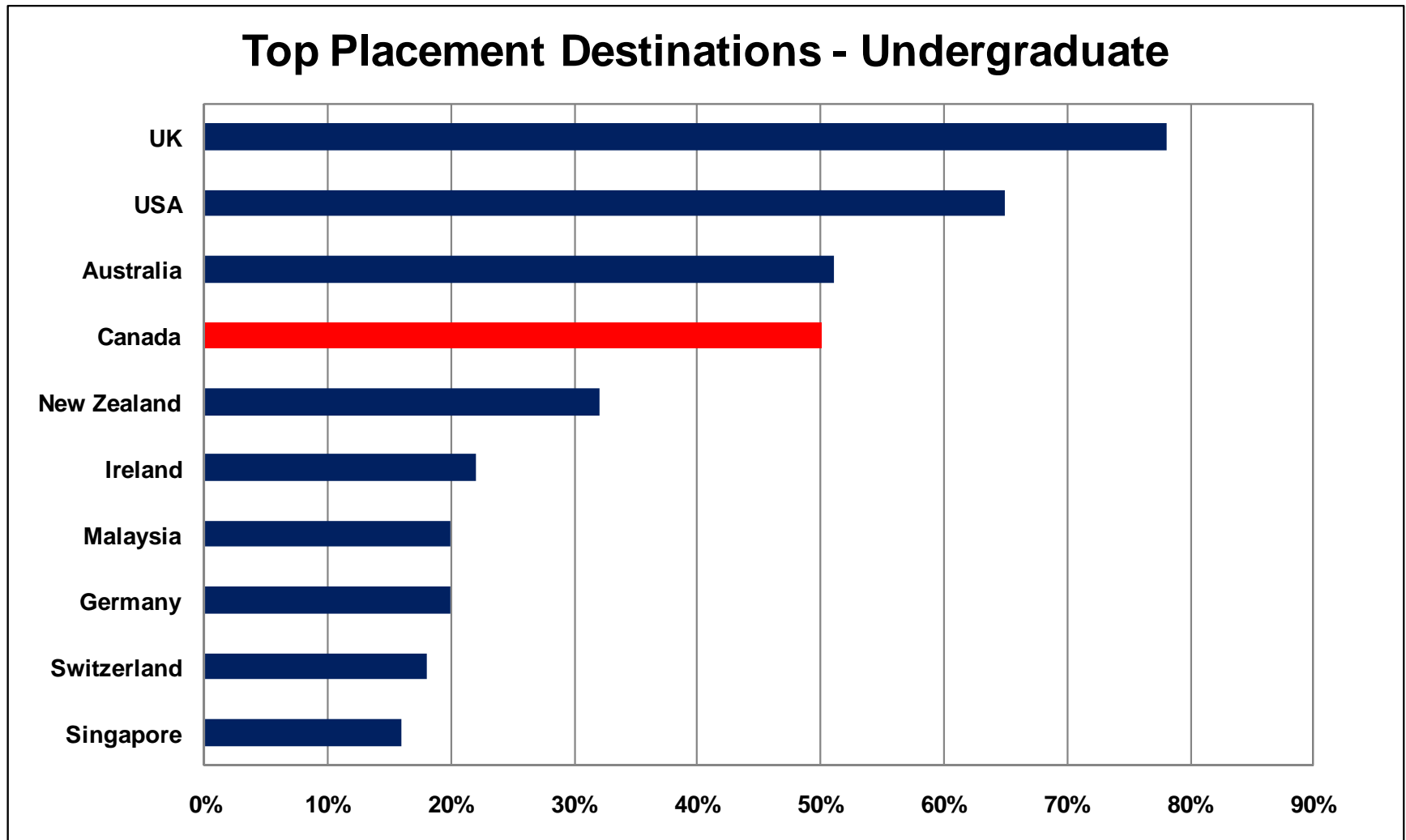
Notes: Sample size is 1,033 agents in 110 countries.

Source: ICEF Agent Barometer, September 2009.



# PERCEPTION OF CANADA

## Higher Education (Undergraduate) Destination

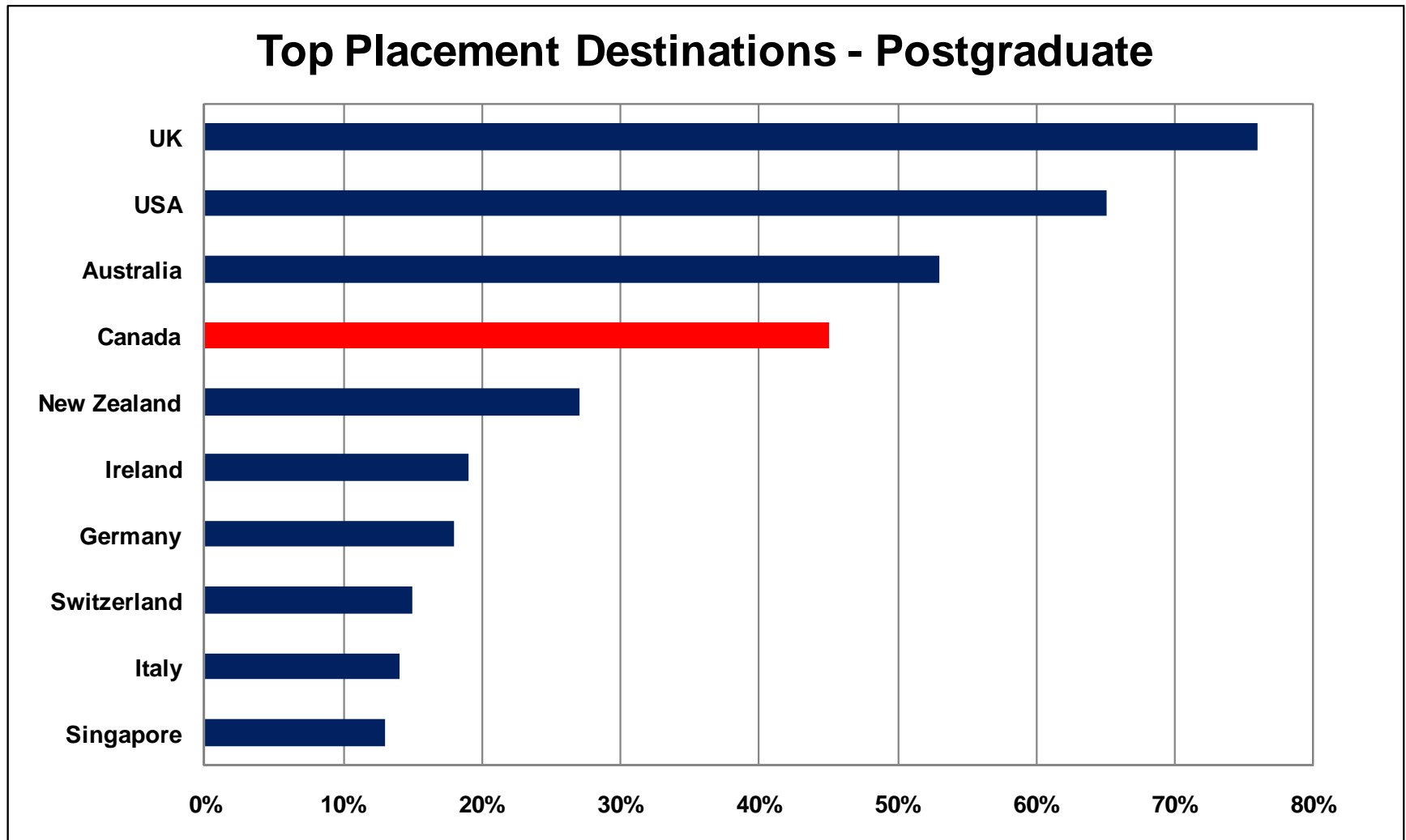


Notes: Sample size is 1,033 agents in 110 countries.

Source: ICEF Agent Barometer, September 2009.

# PERCEPTION OF CANADA

## Higher Education (Postgraduate) Destination



Notes: Sample size is 1,033 agents in 110 countries.

Source: ICEF Agent Barometer, September 2009.

# GLOBAL INNOVATION CAPACITY INDEX

## Canada Ranks Seventh

Rank	Country	ICI
1	Sweden	82.2
2	Finland	77.8
3	United States	77.5
4	Switzerland	77.0
5	Netherlands	76.6
6	Singapore	76.5
7	Canada	74.8
8	United Kingdom	74.6
9	Norway	73.5
10	New Zealand	73.4

**A high correlation between ICI and recruiting success**

# RECOMMENDATION: CREATION OF AN INTERNATIONAL EDUCATION MARKETING AGENCY



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**Value-added recruiting**

- **Multi-international experiences**
- **Internationalization at home**
- **Alumni networks**
- **Internships**
- **Co-op programs**
- **Work permit**
- **Permanent residency**
- **Citizenship**

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