2008 ANNUAL CEC CONFERENCE

An Introduction to Marketing and Recruiting in Online Communities

The Illuminate Consulting Group

24 November 2008

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

- 55 minutes for the presentation and 20 minutes for discussion
- The presentation will be posted on www.illuminategroup.com
- Some 2008 Web 2.0 / online community-related presentations:
 - CASE Leadership Summit / Europe Annual Conference
 - The Future of Community and Affinity in an Online World
 - The Online Communities Workshop
 - The Online Community Agenda
 - EAIE Annual Conference
 - Web 2.0, Alumni, and International Student Recruiting
 - AIEC/IDP Annual Conference
 - How Online Communities Change International Education
 - CBIE
 - Strategic Responses to Online Communities & Platforms

IS ALL OF THIS WEB 2.0 STUFF FOR REAL?

- When it comes to marketing and recruiting higher education institutions, conditions have changed drastically across multiple dimensions
- International students have begun to matter a great deal to institutions, from tuition income to talent acquisition. At the same time competition between institutions and countries for such students has increased
- Technology has been a key driver moving on from e-mail to IM to text messaging (SMS). Reaching today's and tomorrow's students is fundamentally different than it was just 10 years ago
- Online communities/platforms and a number of Web 2.0 tools are already instrumental in reaching (potential) students and alumni, and will eventually act as the main communication conduit to reach everyone

The future already arrived yesterday

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

- You've heard about Facebook. But who has an account?
- What in the world is Orkut?
- What accounts for the majority of interactions on Second Life?
- Who has posted a video on YouTube?
- What is the largest / most frequented online community?
- Who spends more than 30 minutes a day in communities?
- Have you been tweeted?
- Bonus question: Whose institution has developed an integrated, crossfunctional social media communication strategy?

- 1. Google Sites
- 2. Microsoft Sites
- 3. Yahoo! Sites
- 4. Facebook.com
- 5. eBay
- 6. Wikipedia Sites
- 7. AOL LLC
- 8. Yellow Pages Group
- 9. Amazon Sites
- 10. Canoe Network

⁽¹⁾ A not insignificant amount of traffic to Microsoft Internet properties is based on service and other requests related to Microsoft software. Source: Comscore, March 2008.

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

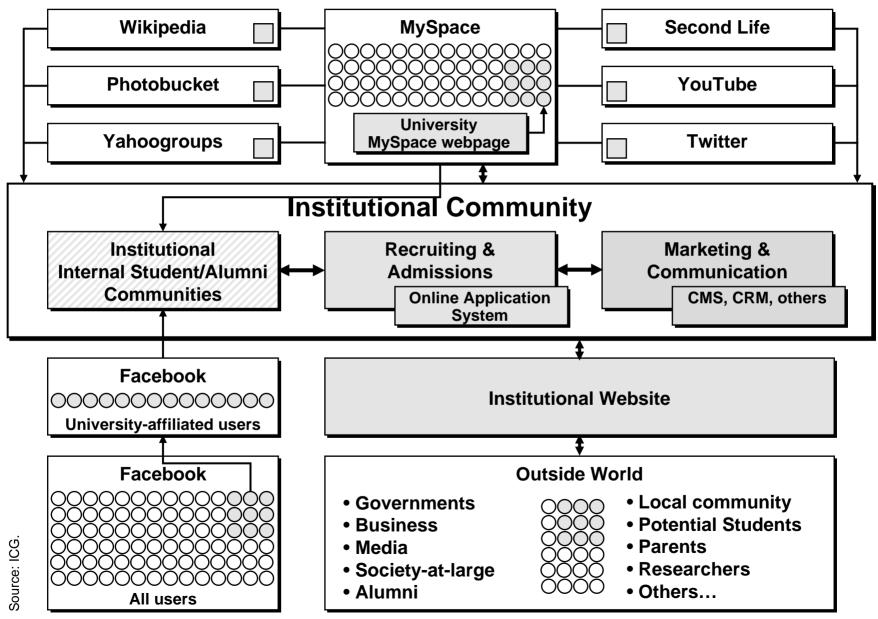
User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

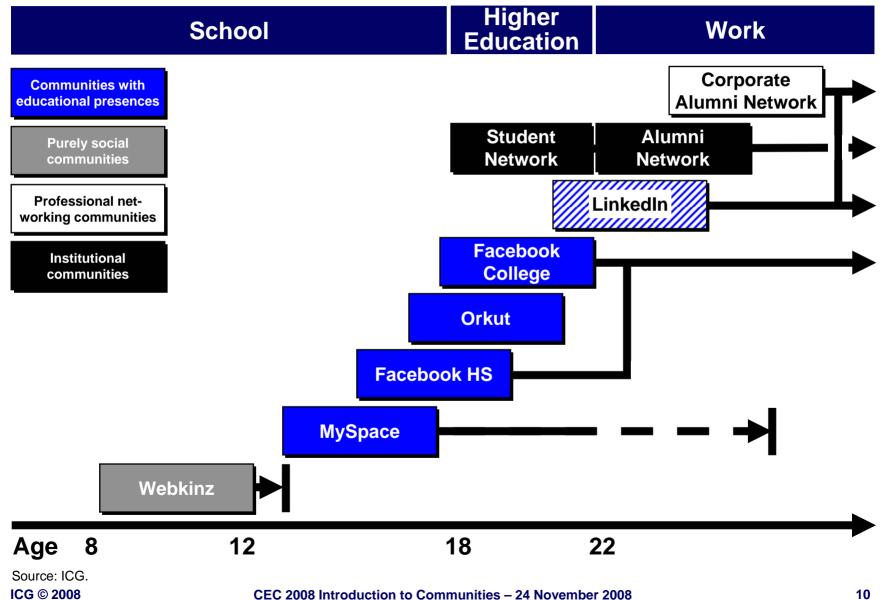
Strategic implications

WHETHER YOU WANT IT OR NOT, YOU ARE ALREADY EMBEDDED IN A GLOBAL COMMUNITY LANDSCAPE



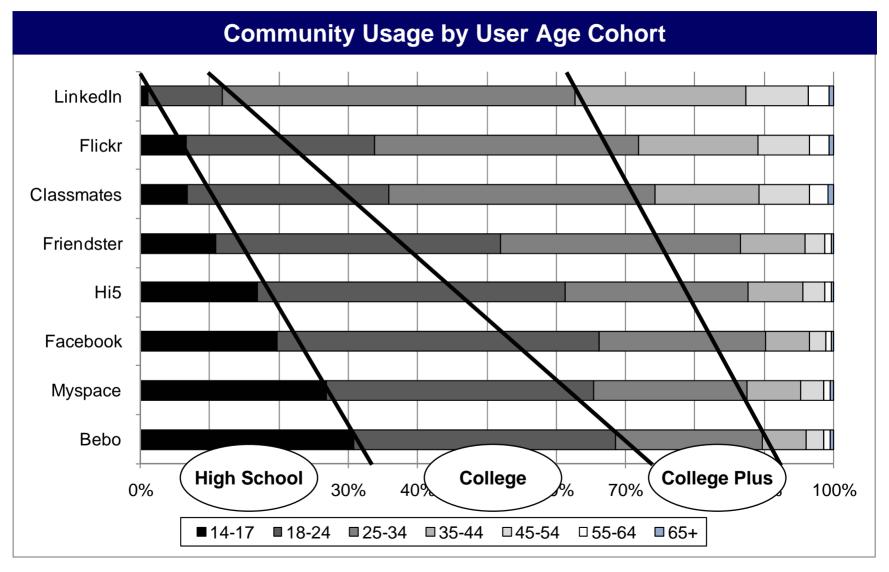
ICG © 2008

BY THE TIME STUDENTS ENTER HIED, THEY ARE ALREADY **DEEPLY IMMERSED IN MULTIPLE COMMUNITIES**



10

DIFFERENT COMMUNITIES OFFER VASTLY DIFFERENT RECRUITING POOLS



Source: Rapleaf, June 2008.

ICG © 2008

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

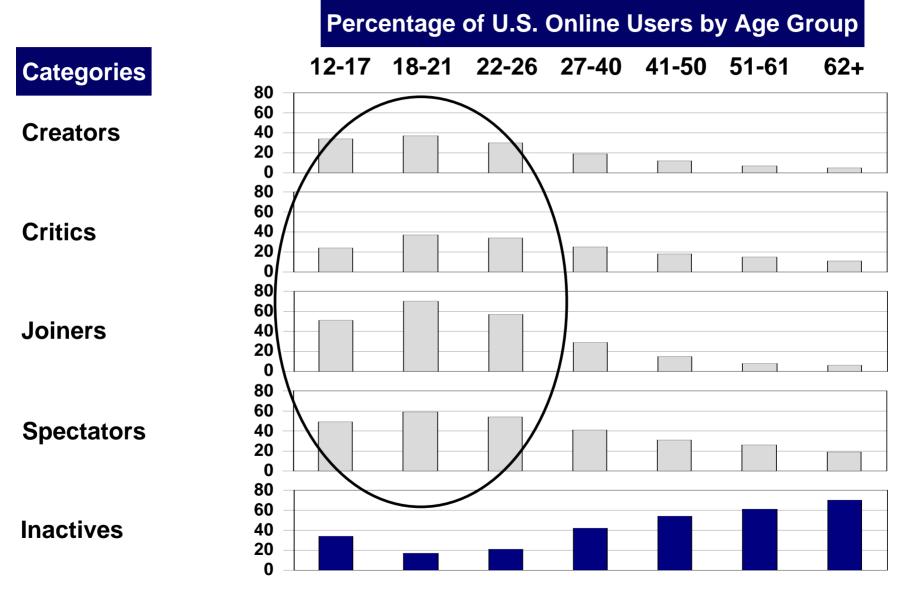
Strategic implications

COMMUNITY USER BEHAVIOR AND ADOPTION: IMPLICATIONS FOR STUDENT RECRUITING

- What do have teenagers in London, Los Angeles, Sydney, Singapore, and Toronto in common?
- They do not like homework? Maybe...
- They will regret fashion choices when their teenage kids find pictures of them in the future? Probably...
- They share two devices:
 - An iPod
 - A cell phone
- They have moved their social infrastructure, communication patterns, and media consumption more or less entirely online
- This has drastic implications: For the first time, a globally homogenous technology user experience has emerged

Does your institution know how to recruit these students?

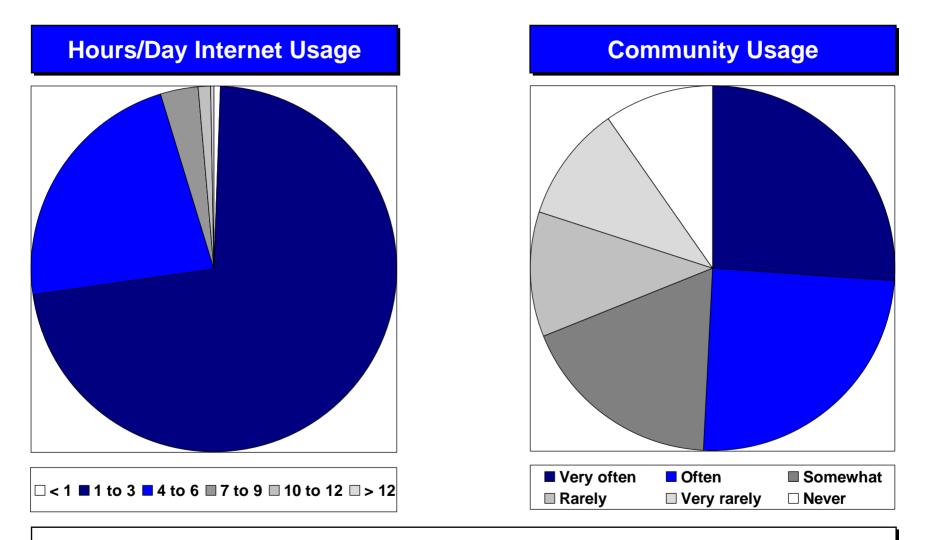
TARGET AGE COHORTS ARE BY FAR THE MOST ACTIVE ONLINE COMMUNITY USERS



Source: Forrester Research, 2007.

ICG © 2008

INTERNET AND COMMUNITY USAGE PATTERNS OF GERMAN HIGHER EDUCATION STUDENTS



Online community usage is a global phenomenon

Source: HIS Studieren im Web 2.0, 2008.

ICG © 2008

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

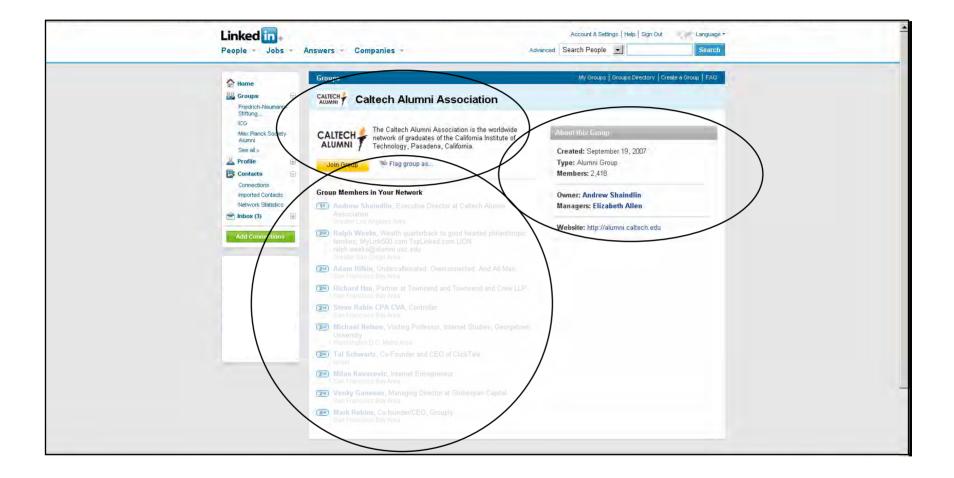
User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

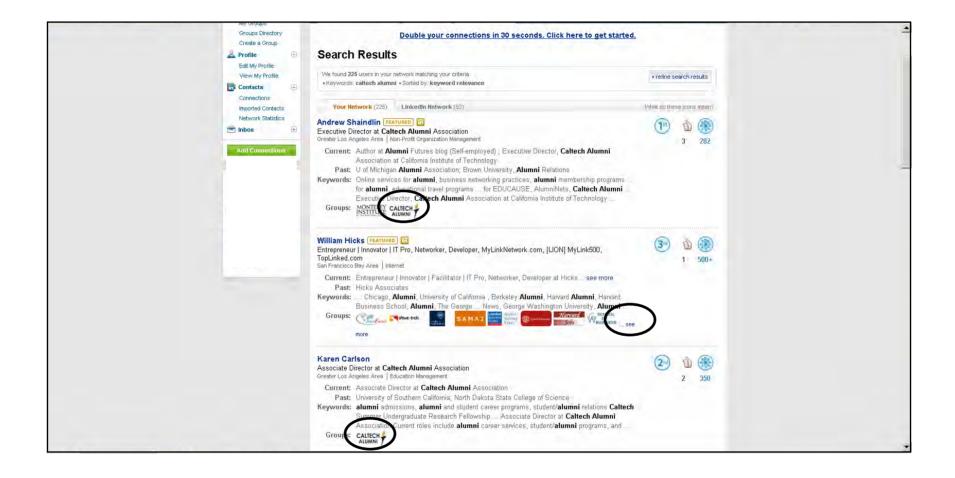
Strategic implications

CALTECH ON LINKEDIN



There is not a lot to see from the outside...

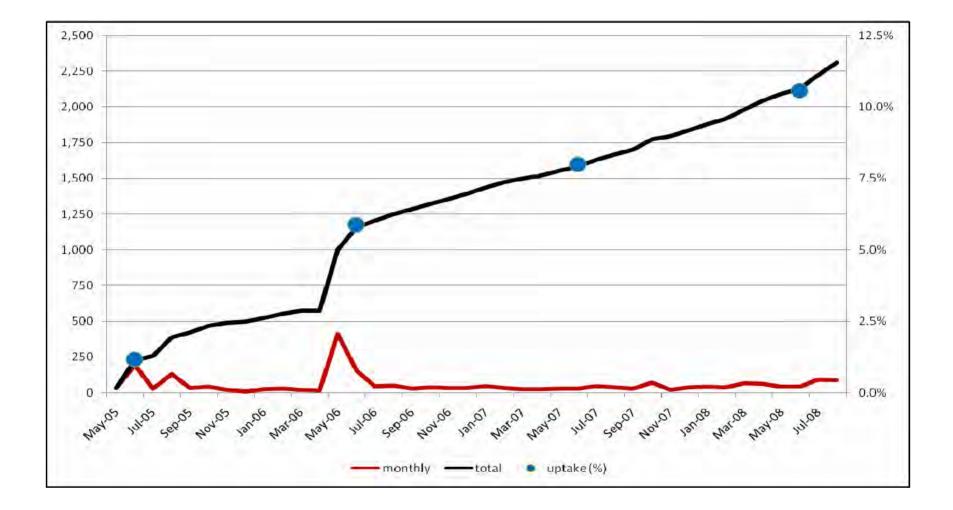
Source: LinkedIn Caltech Alumni Association Group page, October 2008.



It is about branding - which applies to alumni, students, and recruits

Source: LinkedIn search results page, July 2008.

CALTECH ALUMNI GROUP ON LINKEDIN: GROWTH RATES



Sustained growth – despite LinkedIn not appealing to many Caltech alumni

Source: Caltech Alumni Association, September 2008.

ICG © 2008

- The University of Alberta has an exceedingly small footprint on LinkedIn with a total of a mere 460 members
- Only "10" University of Alberta-affiliated groups exist:
 - University of Alberta Alumni 409 members
 - Schulich School of Engineering 25 members
 - Alberta MBA 15 members
 - University of Alberta Gold Key Society 5 members
 - University of Alberta, Law Alumni 1 member
 - University of Alberta, MHSA Alumni 1 member
 - Libon Cardiovascular Institute of Alberta 1 member
 - University of Alberta, Faculty of Extension, MACT 1 member
 - University of Alberta School of Business Alumni Association 1 member
- The overall brand and faculties are represented, but the little differentiated group presence evidences clear brand disassociation patterns

How can future students relate to Alberta in the absence of a networked presence?

Source: LinkedIn, November 2008.

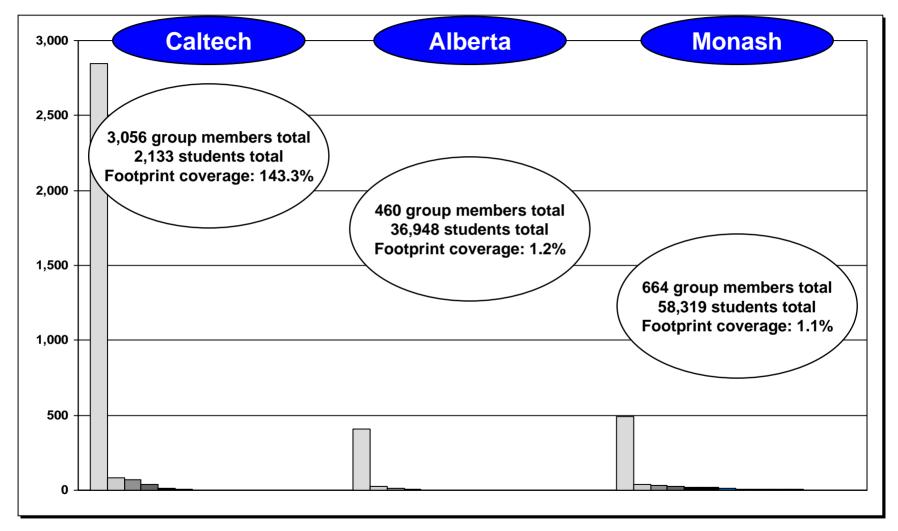
MONASH ON LINKEDIN

- No official presence of Monash University on LinkedIn
- A total of 7,166 alumni are registered but only 664 are registered in groups
- 14 unofficial, recently created and highly fragmented groups relating to Monash University exist on LinkedIn, resulting in brand overlay:
 - Monash University Alumni (created 20 March 2008, 430 members)
 - Monash Uni Alumni (created 13 June 2008, 6 members)
 - Monash Alumni (created 27 February 2008, 19 members)
 - MonashAlumni (created 10 June 2008, members 1)
 - Monash University International Alumni (created 20 June 2008, 36 members)
 - Monash Australia Alumni (created 1 July 2008, 26 members)

Very small footprint: < 1,000 out of > 300,000 Monash community members

Source: LinkedIn, October 2008.

LINKEDIN DEFINED GROUP FOOTPRINT ANALYSIS FOR CALTECH, ALBERTA, AND MONASH



Notes: ICG makes no claim of ultimate accuracy. Data furthermore may be incomplete or structurally inaccurate given a number of methodological constraints. Please see ICG's general commentary on methodological issues. Footprint is calculated as the percentage of respectively affiliated group members on LinkedIn vis-à-vis the student enrollment headcount. Source: LinkedIn, November 2008.

ICG © 2008

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

FACEBOOK: HARVARD UNIVERSITY – WHERE IT ALL STARTED From...

facebook Home Profile Friends Inbox	2 John P Hawk Settings Logout Search Q
My Account	
Settings Networks Notifications N	
You are in one network.	croisière
Harvard Cambridge, MA	
Status: Alumnus/Alumna You have no friends at Harvard.	
There are 66,234 people in the Harvard network.	Join Network
	Gagnez une croisière pour 4, valeur de \$5,000 avec Travelaierts.ca l Restez
	branchés sur les meilleures aubaines de voyage au
	pays 1 $e^{i \omega_{m}} = e^{i \omega_{m}}$
	Vêtements et Accessoires
	ALLESSOILES
	(bour)
	Rends-toi sur le www.laboutik.ca.pour l'achat
	de vétements et d'accessoires à l'effigie de tes artistes préférés
	artistes préférés <u>e^m</u> (^e)
	Welcome Stag's Head
	Stout
	NOER FE
	ALES STATE

Amalgamation: 20,024 enrolled students – 66,234 Facebook members

Source: Facebook, November 2008.

ICG © 2008

FACEBOOK: HARVARD UNIVERSITY – WHERE IT ALL STARTEDTo

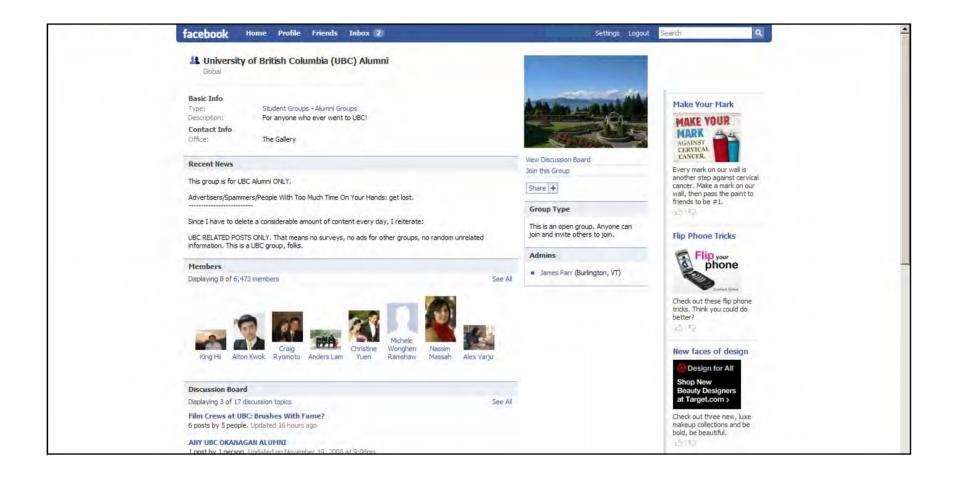
 facebook Home Profile Friends Inbox 2	Settings Logout Search	November 2008
Airvard Q Search Friend Finder All Results Groups Show results from All Networks Image: Comparison of the second se	sites Univer egree fr ink with w. ersityGu Harvard Univer Research and com schools. Get a deg financial aid. www.USADegreeP Join Group	ister than financial ides.com sity pare online ree with
Group: Size: Type: Type: Type: Type: Groups - General Type: Group: Type: Groups - General Groups - General	Request to Join	
Size: 1,332 members Type: Student Groups - General	Join Greux	

Fragmentation reigns

Source: Facebook, November 2008.

ICG © 2008

FACEBOOK: UBC'S ALUMNI GROUP



6,473 out of ~ 160,000 UBC alumni in Facebook group

Source: Facebook, November 2008.

ICG © 2008

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

YOUTUBE: UC BERKELEY WAS THE FIRST UNIVERSITY TO UPLOAD ENTIRE COURSES ONTO ITS YOUTUBE CHANNEL



1.9 million channel views & 16,000 subscribers since October 2007

Source: http://www.youtube.com/user/ucberkeley

ICG © 2008

YOUTUBE: A 5 MINUTE MIT LECTURE VIDEO = A GLOBAL LEARNING AND RECRUITING COMMUNITY



2.4 million views (and it is not even a YouTube channel)

Source: http://www.youtube.com/watch?v=NZNTggIPbUA

YOUTUBE: TORONTO UNIVERSITY RECRUITING CENTER EMERGENCY ROOM

Broadcast Yourself** Home Videos Ch	annels Community	
Videos	Search advanced Upload V	
Toronto University / Recruiting center Emergency Ro	om	
	From: awarenessmuscle Added: March 08, 2008 (more info)	
	2007 http://www.emergencyrooms.org URL http://www.youtube.com/watch?v=lu227Gktjfs	
	Embed <object height="344" width="425"></object>	

What? Luckily, few are watching this video

Source: http://www.youtube.com/watch?v=lu2Z7Gxtjfs

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

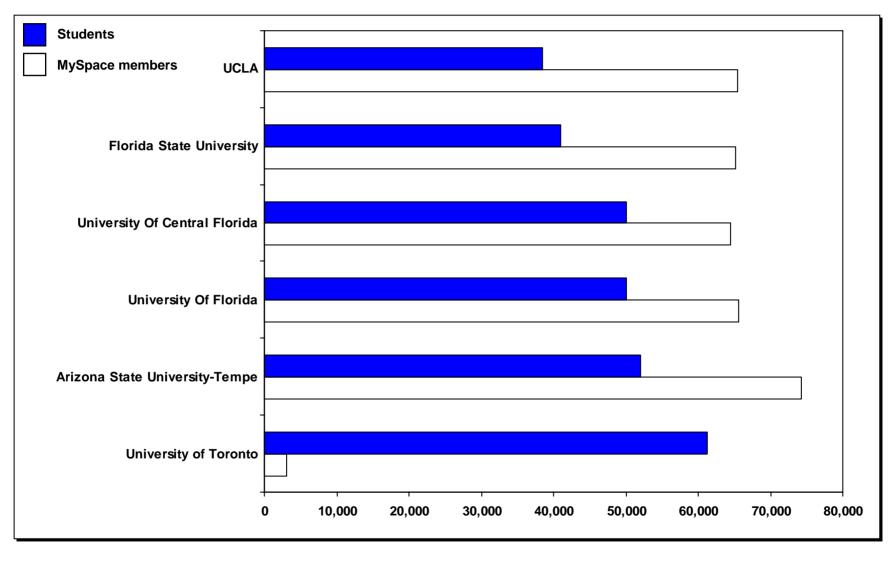
User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

TOP FIVE US UNIVERSITIES AND TORONTO ON MYSPACE

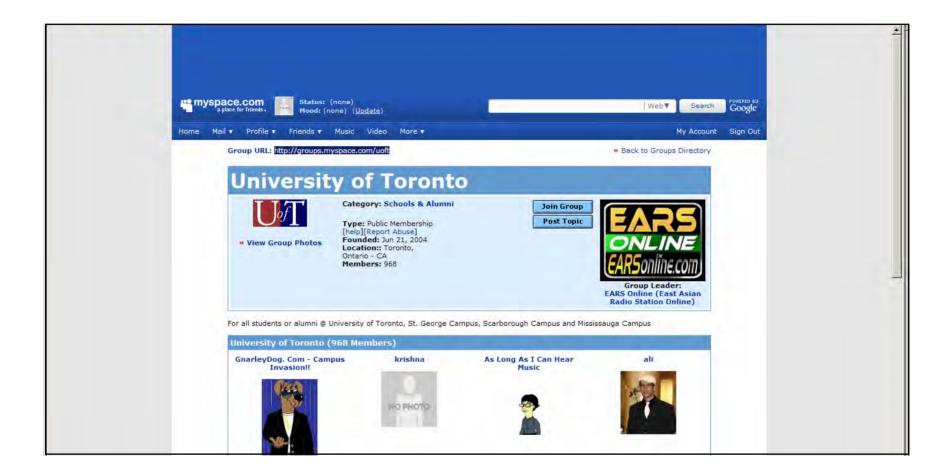


Notes: MySpace list for Top 5 US universities. UoT data per browse function.

Source: MySpace, November 2008.

ICG © 2008

MYSPACE: TOP 5 US UNIVERSITIES & TORONTO GROUP Via Groups Menu



Less than 1,000 dedicated users affiliate with UoT

Source: MySpace, November 2008.

ICG © 2008

MYSPACE: TOP 5 US UNIVERSITIES & TORONTO GROUP Browse Function

Home Ma	ail 🔻 Profile 🕶 🛛	Friends 🔻 Music	Video More 🔻				My Account Sign Out	
Schools >> UNIVER	SITY OF TORO	ΝΤΟ				**	Add this School to your Profile	
Grade yo	our professor	Members (309	4)			9. Browse Schoo	l's Members	
Start g	rading now!!	Current Studen	ts (1788) Alumni	(1306)		Browse For: Female		
Moderate	or	Jonathan	midnight to	Michelle	Hitokiri	between ages:	18 💌 and 68 💌	
Want to b moderato	e this school's r?				(A)	Browse by:	Alumni 💌	
Just Add	led	tenni	٧.	chongkee.	Adamadamada	Adv	anced Browse	
A	manda		NO PHOTO	Ô.	1 A	▲ adverțisement		
Mz	Smooth	Vagabond!	Caro	hErBeRt	NO PHOTO			
	Maddi	<u>1</u> 2 3 4 5 Last	55		<u>view all ></u>			
	TIME	Forum (1 Topics)					📝 Post a New Topic	
		Topics		Posts Las	t Post	Topic S	tarter	

3,094 overall affiliated users: UoT's brand footprint runs at around 0.5%

Source: MySpace, November 2008.

ICG © 2008

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

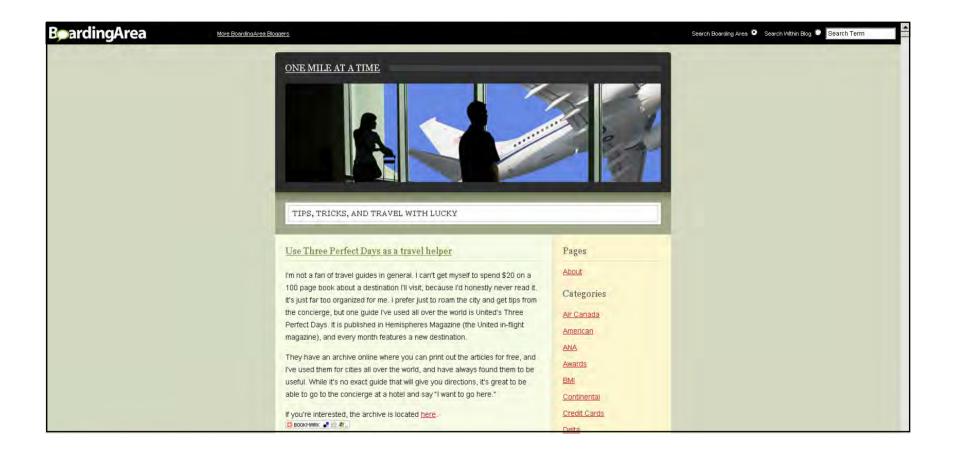
	*About UF	
	*Academics	
	*Admissions	
	Campus Life	
	*Research	Admissions
	*Services	
	RELATED SITES:	Why Choose UF?
	 Undergraduate Application, Status, Honors, Catalog Graduate Application, Deadlines, Fellowships, Graduate Minority Programs, Catalog Transfer Florida A.A. Degree, Freshman/Soph., Junior/Senior International International Admissions, 	UF offers more than 100 undergraduate majors, combined bachelor's/master's degree programs, in 65 departments and more than 200 graduate degree programs. Tour UF's beautiful Gainesville campus or take a <u>virtual tour</u> online. Undergraduate Admissions Outstanding students, faculty, programs, facilities and scholarship opportunities have made UF one of the nation's best universities, public or private, and one of the best deals. The Office of Admissions provides information to high school students preparing for college, freshman candidates applying to UF and students who want to transfer to UF. To apply online, complete the application for undergraduate admission. Graduate Admissions
	International Center Costs & Financial Aid Undergrad Costs, Graduate Costs, Housing, Meal Plans, Student Jobs, Scholarship, Bright Futures, Deadlines & Critical Dates	The graduate admission process is coordinated by the graduate departments and the admissions office. Graduate application instructions and graduate resources provide the information needed to choose a degree program. To apply online, complete the application for graduate admission. Already Applied? Undergraduates can check their application status online; graduate applicants should contact their graduate departments. While waiting for an admission decision, learn more about housing on campus, meal plans, computer requirements and scholarships and financial aid.
Done		

Let's remember this gentleman

Source: www.ufl.edu/admissions.

ICG © 2008

GETTING TO KNOW LUCKY: ONE MILE AT A TIME



Lucky's blog started eight months ago, now reaches up to 1,500 hits/day

Source: http://boardingarea.com/blogs/onemileatatime.

HOW LUCKY'S BLOG TIES INTO THE LARGEST COMMUNITY OF AIR TRAVELERS IN THE WORLD (FLYERTALK)

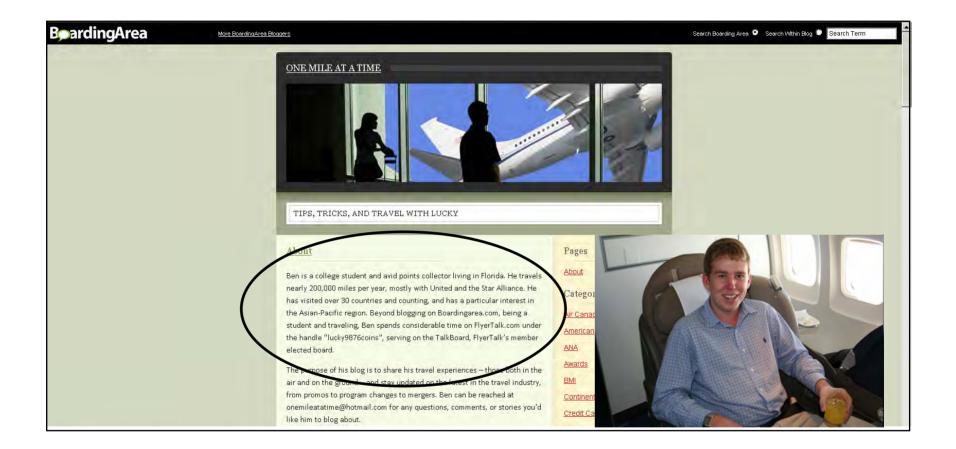
MyFlyerTalk	FAQ	Calendars	New Posts	Search 🐨	Quick Links 💙	Log Out			
iew Profile: lucky9876coins									
ICKY9876coins) IkBoard Member/FlyerTalk Evangelist									
						Last Activity: Today 8:40 pm			
Add lucky9876coins to Your Buddy List				Add lucky9876coins to Your Ignore List					
Inature									
heck out my trip report on NH	I/SQ/AC Biz to Asia	, as well as the Conrad Ho	ng Kong, InterContinental B	ali, etc 🆢					
orum Info			Contac	r 1010					
Join Date: Dec 8, 04 - Posts - Total Posts: 21,197 (15:89 posts per day) - Find all posts by lucky9876coins - Find all threads started by lucky9876coins			http://bo Email: Send a r Private 1	Home Page: http://boardingarea.com/blogs/onemileatatime/ Email: Send a message via email to lucky9076coins Private Message: Send a private message to lucky9076coins					
Réferrals: 1									
dditional Information			Group	vlemberships					
Date of Birth: April 20 Location: Tampa/Gainesville Program Affiliations: United IX/RCC, AA Gold, PC Plat, IC RA, I Interests: Travel, Photography, Aviation	Hilton Gold, Marriott Gold, S	tarwood Gold, Amex Plat	lucky98	lucky9876coins is not a member of any public groups					

Three and a half year of community participation: 21,197 posts

Source: "Lucky's" profile on www.flyertalk.com.

ICG © 2008

MEET LUCKY



Not a CEO. Not a consultant. A college student at the University of Florida

Source: http://boardingarea.com/blogs/onemileatatime.

ICG © 2008

REVISITING THE UNIVERSITY OF FLORIDA ADMISSIONS WEBPAGE

What kind of Web 2.0 / community recruiting features does UF employ?

Source: www.ufl.edu/admissions.

ICG © 2008

INTERNATIONAL STUDENT RECRUITING AT UF



Here's a hint: This is not community or Web 2.0-based recruiting

Source: www.ufl.edu/admissions/prospectiveinternational.html.

JUST A SUGGESTION...

University of Florida	UF Web with Google 🗾 Search	8	
 About UF Academics Admissions Campus Life Research Services 	Why Choose UF?		Meet Lucky
	UF offers more than 100 undergraduate majors, combined bachelor's/master's degree programs in 65 departments and more than 200 graduate degree programs Tayr UF on a visit to UF's beautiful Gainesville campus or take a virtual tour online. Undergraduate Admissions Outstanding students, faculty, programs, facilities and scholarship opportunities hav made UF one of the nation's best universities, public or private, and one of the best deals. The Office of Admissions provides information to high school students preparing for college, frashman candidates applying to UF and students who want to transfer to UF to apply online, complete the application for undergraduate admission. Graduate Admissions The graduate admission process is coordinated by the graduate departments and the admissions office. Graduate application instructions and graduate resources provide the information needed to choose a degree program. To apply online, complete the application status online; graduate applicates should contact their graduate departments. While waiting for an admission decision, learn more about housing on campus, measures, computer resources and scholarships and financial aid. Status I Campus Map WebMail Ask UF (1323) 392-3251. Underdel October 6, 2008.	he e the	

Drivers: Credibility – relevance – leverage – timeliness

Source: www.ufl.edu/admissions (sort of).

ICG © 2008

AGENDA

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

Discussion

- For (international) recruiters
 - Soon nearly all target pools will participate in communities, revealing deep personal information but also acquiring specific knowledge about institutions. Response: Survey, observe, gently engage, and never push against a community's culture and tonality
- For alumni relations staff and career services
 - Communities have become a transactional meeting ground for alumni of all institutions – which challenges traditional service and communication models. Response: Connect, communicate, leverage
- For marketing and communication staff
 - Communities are on their way to become the most important (but not only) channel to reach students, while at the same time inducing a new intranetwork dynamic. Response: Seeding, encouraging, and monitoring
- For educational delivery (learning/teaching) staff
 - Web 2.0 tools and platform are fundamentally altering the way and modes of how teaching and learning is taking place. Response: You have to get in front

FIVE STEPS TO CONSIDER

- Educate all relevant units (alumni, fundraisers, marketing, admissions, communication, faculty leadership, legal, IT, etc.) on what is happening and the existing tactical and strategic challenges
- Analyze the implications for the institution. Map challenges and opportunities. Break rules and cross internal silos
- Devise an integrated strategic response and educate and train relevant units in the institution
- Test. Implement. Test some more. Map and measure. Revise. Change
- Repeat Steps One to Four

AGENDA

Introduction and Housekeeping

A survey of Web 2.0 tools and platforms

The Web 2.0 and online community landscape

User behavior and segmentation

Case studies

- LinkedIn: Caltech & Monash & Alberta
- Facebook: Harvard & UBC
- YouTube: Berkeley & MIT & Toronto
- MySpace: Top 5 US universities & Toronto
- Blogging: Do you want to get Lucky?

Strategic implications

Discussion

Daniel J. Guhr, Ph.D. Managing Director

San Francisco Bay Area Office P.O. Box 262 San Carlos, CA 94070 USA

- Phone +1 (619) 295 9600
- Fax +1 (650) 620 0080
- E-mail <u>guhr@illuminategroup.com</u> Web <u>www.illuminategroup.com</u>

This presentation was presented on 24 November 2008 at the CEC Annual Conference in Montreal.

ICG grants CEC the license to publish this presentation – unaltered, unabridged, and properly referenced – as part of the conference documentation.

All content, data, concepts, models, and case studies in this presentation are and remain the intellectual property of ICG or of specifically referenced institutions and sources.

This presentation shall be considered incomplete without oral clarification and thus no inferences or judgments shall be made about the content and statements included in this presentation.