COLLABORATIVE MARKETING FRAMEWORK

Australian Government
Austrade

Australia UNLIMITED

A framework for international education market prioritisation, collaboration and reputation management.

Objective

A nationally consistent approach to marketing and branding of Australia is key to the sustainable growth of the sector. Activities by the range of marketing bodies across Australia present some risks and many opportunities to coordinate and align efforts. Coordination has the potential to increase Australia's profile, improve stakeholder engagement and amplify industry capacity amongst sector representatives.

This Collaborative Marketing Framework reflects the views of sector representatives (from the Council for International Education's Marketing and Collaboration Working Group) on opportunities for collaboration.

The framework also reflects the views of Commonwealth and state and territory representatives of the International Education Marketing Forum (IEMF).

The framework is intended to:

1. Identify where joint marketing activities can be most beneficial (Market Prioritisation)
2. Outline potential models and approaches to collaboration and co-design (Collaboration Opportunities)
3. Support collaboration across governments and the sector
4. Guide collective responses to incidents that have the potential to adversely impact the reputation of Australian education and training.

Principles

The framework is underpinned by the following principles:

1. Cooperation provides benefits for all international stakeholders and can occur at various levels (for example, Commonwealth, state and territory governments, city organisations, regions, study destinations, sectors).
2. Collaboration occurs on an 'opt-in', rather than mandated basis. It recognises that available resources are not a reflection of commitment.
3. The framework is a tool to provide insight and guidance, not dictate action.
4. The framework relies on quality data that is updated annually.
5. The framework is a dynamic, iterative resource. It will build on what works, based on the evolution of the data.

How the framework will be used

The framework is a co-created resource, overseen by the International Education Marketing Forum (IEMF). Data will be updated annually and the usability and value of the framework will be regularly reviewed.

1. Where to focus collaborative effort: Market Prioritisation

Market Prioritisation under the framework is a data-driven guide to identifying collaboration opportunities across governments and sectors. It provides an evidence base to support marketing decisions and collaborative approaches within regions, states and territories or among member organisations.

The Market Prioritisation approach ranks collaboration opportunities by market size (overall enrolments), and market diversity by provider/sector enrolment activity. This is presented conceptually in Figure 1, which uses full year 2017 onshore enrolment data (see Appendix B). The presentation of collaborative opportunities comprises the following features:

1. The **breadth** of each market (national coverage) is represented on the x axis.
2. The **depth** of each market — diversity of sector[1] enrolments — is represented on the y axis.
3. The coloured bars on the matrix represent the overall **enrolment numbers** from the market.
4. In addition to the four square matrix, the framework identifies **'wildcard' markets**, based on:
    a) changes, over time, to Australia's global competitive position; and/or
    b) where our competitors are active and there may be opportunity for Australia to increase market share.

The resulting five tiers of markets are summarised in Table 1.

For a more detailed description of the methodology, see Appendix A.

1. encompassing Schools, ELICOS, VET, HE, Non-award

Table 1: Five tiers of Market Prioritisation to guide collaborative effort

Tier	Description
1	Market where activity is **widespread and intensive**. › Six or more states or territories have over one third of providers with enrolments; and › Four or more sectors have over one third of providers with enrolments from the market. These are strong and mature markets with established links to Australian education providers. Opportunities for collaboration could include addressing challenges of scale.
2	Market where activity is **widespread**. › Six or more states or territories have over one third of providers with enrolments. These markets have significant potential for increased sector diversity. Opportunities for collaboration should be actively sought, including cross-sector products and services and sharing costs, across sectors, associated with market entry.
3	Market where activity is **intensive**. › Four or more sectors have over one third of providers with enrolments from the market. These markets have significant potential for increased enrolments, particularly in some states or territories. Opportunities for collaboration should be actively sought, including partnerships between state and territory, and Commonwealth governments.
4	Markets where Australia's competitive position provides **for opportunistic marketing activities.** These markets are emerging and may present future growth potential. Opportunities for collaboration should be monitored by observing trends and analysing competitor behaviours.
Wildcard	Markets where our **competitors are active** and/or there may be opportunity for Australia to increase market share. Wildcard markets are markets with more than 1,000 enrolments where Australia had lost, or gained, competitive position in the most recent data for outbound tertiary mobile students, vis-à-vis the US and UK (UNESCO, 2015). Wildcard markets take into account: a) changes, over time, to Australia's global competitive position; and/or b) where our competitors are active and there may be opportunity for Australia to increase market share.

The figure below represents opportunities for collaborative actions in Australia's top source markets. It is organised by:

1. The **breadth** of each market (number of jurisdictions with threshold numbers of enrolments from each market).
2. The **depth** of each market (number of sectors with students enrolled from each market).
3. The height of the coloured bars on the matrix represent the overall **enrolment number**s from the market.

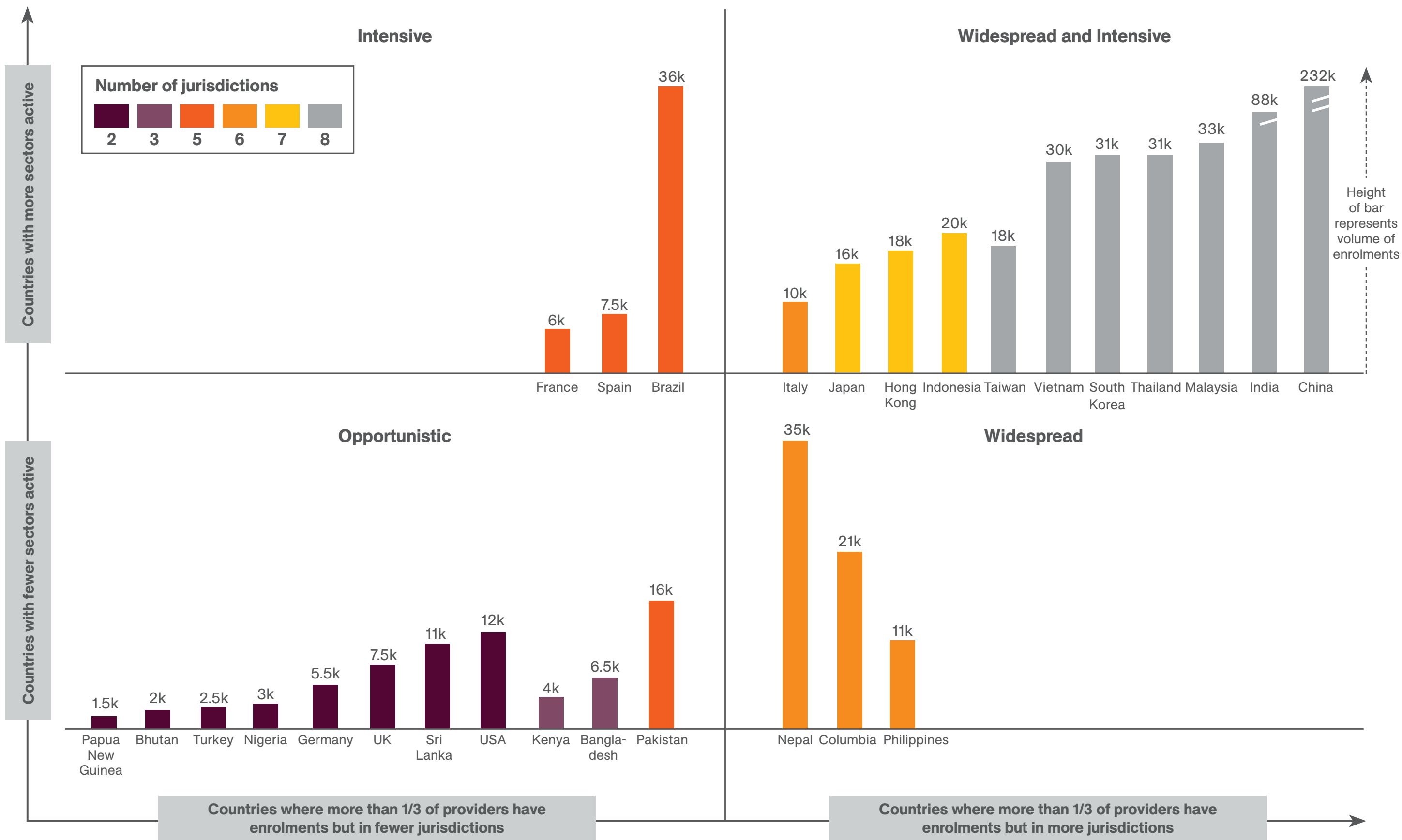
Figure 1: Conceptual presentation of Market Prioritisation across tiers

TIER 3 This quadrant represents markets with enrolments across a number of sectors, but in a limited number of jurisdictions.

These markets have significant potential for increased national coverage, Opportunities for collaboration should be actively sought.

TIER 1 This quadrant represents markets that are active across sectors and have broad national coverage (enrolments in 6-8 jurisdictions).

These are strong and mature markets with established links to Australian education providers.



TIER 4 This quadrant represents markets that have limited sector diversity, and limited national coverage.

These markets are emerging and may present future growth potential. Opportunities for collaboration should be monitored by observing trends and analysing competitor behaviours.

TIER 2 This quadrant represents markets with enrolments from a limited number of sectors, but with broad national coverage.

These markets have significant potential for increased sector diversity. Opportunities for collaboration include cross-sector products and services.

2. How to maximise collaborative opportunities: Models and approaches

Benefits of collaboration include aggregating and sharing of information and leading practices, in a cost-effective way. Specifically, collaboration:

- Builds a stronger presence for Australia through consistency of message
- Enables greater traction in markets by maximising impact of spend and lowering buy-in thresholds
- Helps articulate market needs and opportunities
- Responds to instances where Australia has a loss of market share, is tracking below projections, or opportunity emerges relative to key competitors
- Ensures supply side capacity and appetite for growth.

The framework considers proactive opportunities based on data and market insights and reactive marketing to respond to events that may adversely impact the reputation of Australian international education and training.

Following the prioritisation of collaborative opportunities across different markets, there are a number of models and approaches that could be considered:

- Development of Market Action Plans (as is the case with Vietnam, Indonesia and Mexico)
- Specific sector, discipline or industry opportunities
  - Recognising that Australia's competitive differentiation is more effective in discrete areas, but not all jurisdictions may share in the same strengths
- Shaping strategic messaging and other shared collateral
- Enhanced data collection and dissemination
- Joint market research and student insights
- Campaigns (including but not limited to traditional advertising campaigns, digital marketing, and social media campaigns)
- Alumni Engagement
- Collaboration with tourism industry.

Case study 1

#GoBeyond Regional campaign

The *#GoBeyond* regional Australian education campaign ran on Facebook from April – June 2018 targeting international students in Indonesia, Philippines, Brazil, Colombia and Malaysia. The campaign was a collaborative approach between Austrade and states and territories to raise the profile of Australian study options for international students outside of Sydney, Melbourne and Brisbane. States and territories sourced images for the campaign from regional institution partners to assist campaign asset development. States and territories were then able to utilise the campaign assets to conduct their own state-based campaigns.

Case study 2

Philippines Digital Influencer Campaign for Education

In April 2018, Philippine social media influencer, athlete and TV host Gretchen Ho travelled to Queensland, the Northern Territory and Victoria to showcase the best of *#studyinAustralia*.

Gretchen shared with her millions of social media followers, the best of Australian cities and education campuses, while meeting international students and Australian academics. The digital campaign was organised by Austrade in partnership with Study Queensland, Study Northern Territory, Study Melbourne and Qantas. This campaign was co-funded delivering great value and exposure to participating jurisdictions. The campaign included interviews with students and academics, classroom participation and promotion of campus facilities. Through Gretchen's extensive social media presence and demographic following, the campaign has raised awareness about Australian education, showcased Filipino students' and alumni experiences studying in Australia and engaged potential students and parents.

3. Reputational Response Framework

In the design and testing of this framework, partners agreed that if we are to collaborate to grow and open markets, we must also collaborate in our messaging and responses to incidents that have the potential to negatively impact the reputation of Australian education and training.

The Reputational Response has the following objectives:

- Implement a structured and repeatable process to govern Australian stakeholder interactions in response to incidents.
- Overlay (and not duplicate) existing incident management planning within jurisdictions, and utilise existing good practice.
- Consider both **reactive** incident management and **proactive** monitoring.

Appropriate responses to incidents will be tailored according to the nature of the incident. This work should complement incident management plans that are owned and maintained locally within jurisdictions. This approach continues to acknowledge the requirement of providers to have incident plans in place address the immediate and ongoing safety and welfare of students.

The severity of the incident and potential for reputational damage determines the frequency and seniority of mobilisation across Australian Government and between jurisdictions to monitor and respond.

Key messages for reputational response will be developed as part of the Strategic Messaging Framework.

Appendix A: Market Prioritisation Methodology and Data

The Market Prioritisation approach ranks collaboration opportunities by market size (overall enrolments), and market diversity by provider/sector enrolment activity. The presentation of collaborative opportunities is based on the following methodology.

To capture markets of significant opportunity, only those with a minimum of 1,000 onshore enrolments in Australia in 2017, or for schools a minimum of 200, are included.

States and territories where **more than one third of providers in that jurisdiction** had enrolments from the market are categorised. This identifies markets of broad value across providers within each state or territory, rather than a market of value for only one or two providers. The framework distinguishes between markets:

- a) with **six to eight** states and territories where one third of providers are active in the market (tiers one and two); and
- b) with **two to five** and territories where over one third of providers are active in the market (tiers three and four).
- c) Markets with enrolments in only one state or territory are not included.

Sectors[2] where **more than one third of providers in that sector** had enrolments from the market are identified.

The framework distinguishes between markets:

- a) with **four or more** sectors where over one third of providers are active in the market (tiers one and three); and
- b) with **up to three** sectors where over one third of providers are active in the market (tiers two and four).

In addition to the four square matrix, the framework identifies **'wildcard' market**s. Wild card markets are markets with more than 1,000 enrolments and Australia had lost, or gained, competitive position in the most recent data for outbound tertiary mobile students, vis-à-vis the US and UK (UNESCO, 2015). These wildcard markets take into account:

- c) changes, over time, to Australia's global competitive position; and/or
- d) where our competitors are active and there may be opportunity for Australia to increase market share.

2. Deloitte Access Economics and EduWorld, *Growth and opportunity in Australian International Education* (A report prepared for Austrade), December 2015

Appendix B: 2017 Onshore Enrolment Data

Total / all sectors

Market	Number of widely active states/territories	Enrolments (2017)	Competitive position
China	All	231,191	
India	All	87,615	▲
Malaysia	All	32,899	
Korea	All	31,112	
Vietnam	All	30,356	▼
Thailand	All	30,730	
Taiwan	All	18,227	
Indonesia	7/8	20,028	
Hong Kong	7/8	17,772	▼
Japan	7/8	16,041	
Philippines	7/8	10,803	▲
Nepal	6/8	35,423	▲
Colombia	6/8	21,628	
Italy	6/8	10,248	
Brazil	5/8	36,496	▲
Pakistan	5/8	15,738	▲
Spain	5/8	7,729	
France	5/8	5,914	
Zimbabwe	4/8	1,441	
United Kingdom	3/8	7,497	
Bangladesh	3/8	6,565	
Kenya	3/8	4,035	
Singapore	–	8,335	▼
Mauritius	–	2,389	▼
Oman	–	1,280	▼

▲ Australia has lost more than 1 per cent market share and the US, UK or both have gained market share in 2015.

▼ Australia has gained more than 1 per cent market share, and the US, UK or both have lost market share in 2015.

NOTES

- Markets with no indicator in the competitive position column have 2015 market share of within 1 per cent of their 2014 market share.
- There is no data available for Taiwan.
- Competitive position is calculated on the latest available market share data for outbound tertiary mobile students by country and destination from UNESCO (2014 and 2015). This does not include all sectors, only tertiary education- ISCED levels 5 to 8.

Higher Education

Market	Number of widely active states/territories	Enrolments (2017)
China	All	133,891
India	All	54,376
Nepal	All	21,481
Vietnam	All	15,092
Malaysia	All	14,680
Pakistan	All	11,000
Indonesia	All	9,293
Hong Kong	All	8,888
Sri Lanka	All	7,566
Singapore	All	7,214
Bangladesh	All	5,401
Korea	All	5,083
Philippines	All	4,198
Taiwan	All	2,648
Thailand	All	2,586
Kenya	All	2,086
Nigeria	All	1,899
Brazil	All	1,639
Japan	All	1,594
Colombia	All	1,543
Canada	All	2.634
United States	7/8	2,815
Germany	6/8	1,258
France	6/8	1,191
Mauritius	7/8	1,026
Saudi Arabia	4/8	4,003
Iran	3/8	2,304
United Kingdom	4/8	1,444

VET

Market	Number of widely active states/territories	Enrolments (2017)
India	All	27,560
China	All	18,544
Vietnam	All	6,977
Philippines	All	5,856
Korea	7/8	17,657
Thailand	7/8	17,349
Brazil	6/8	16,164
Malaysia	7/8	12,905
Taiwan	7/8	9,460
Nepal	7/8	9,396
Indonesia	6/8	8,306
Italy	7/8	5,776
Japan	6/8	4,481
Hong Kong	7/8	4,386
Pakistan	7/8	3,641
Spain	5/8	2,787
France	5/8	2,334
Colombia	4/8	7,077
United Kingdom	3/8	3,829
United States	3/8	2,432
Sri Lanka	4/8	2,058
Kenya	3/8	1,751
Chile	3/8	1,570
Germany	3/8	1,240

ELICOS

Market	Number of widely active states/territories	Enrolments (2017)
China	All	45,617
Brazil	All	18,205
Colombia	All	12,901
Thailand	All	10,195
Japan	All	8,082
Korea	All	6,697
Taiwan	All	5,412
India	All	5,071
Vietnam	All	4,545
Hong Kong	All	2,077
Spain	6/8	4,175
Malaysia	7/8	3,703
Nepal	6/8	3,176
Italy	7/8	2,655
Chile	6/8	2,104
Indonesia	6/8	1,361
France	6/8	1,190
Saudi Arabia	4/8	1,998
Mongolia	3/8	1,659
Turkey	3/8	1,270

Schools

Market	Number of widely active states/territories	Enrolments (2017)
China	All	13,547
Vietnam	6/8	2,924
Taiwan	7/8	290
Korea	4/8	1,203
Thailand	3/8	428
Malaysia	3/8	377

Non-Award

Market	Number of widely active states/territories	Enrolments (2017)
China	All	19,592
United States	All	6,508
Germany	7/8	1,894
Hong Kong	6/8	1,236
Malaysia	7/8	1,234
France	7/8	1,123
United Kingdom	4/8	2,143
Nepal	3/8	1,326
Norway	3/8	1,255