

Swedish Universities Meeting

Perspectives on International Recruitment

DISCLAIMER

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- **The presentation shall be considered incomplete without oral clarification**
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Housekeeping

Welcome: Linköping University

A Brief Recap of the Introduction of Tuition Fees

Perspectives on 2011-12 Non-EEA Student Enrollment Figures

Key Challenges

Strategic Options Going Forward

Discussion

HOUSEKEEPING

- The session will be introduced and thematically framed by Lars Holberg from Linköping University
- The ICG presentation section is geared for about 35 minutes
- About 20 minutes are allocated for discussion
- ICG members will be available to answer further questions throughout the conference, and at upcoming sessions including
 - ICG *Web 3.0 in Higher Education* report release – Thursday, 8:30 am
 - ICG *ISAFM Version 2.0* release – Friday, 8:30 am
 - EAIE session on *How Students use the Web to Counterbalance Institutional Recruiting Processes* – Friday, 1:00 pm
 - EAIE session on *International Alumni as Talent Scouts* – Friday, 3:00 pm

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- **Comments go here...**

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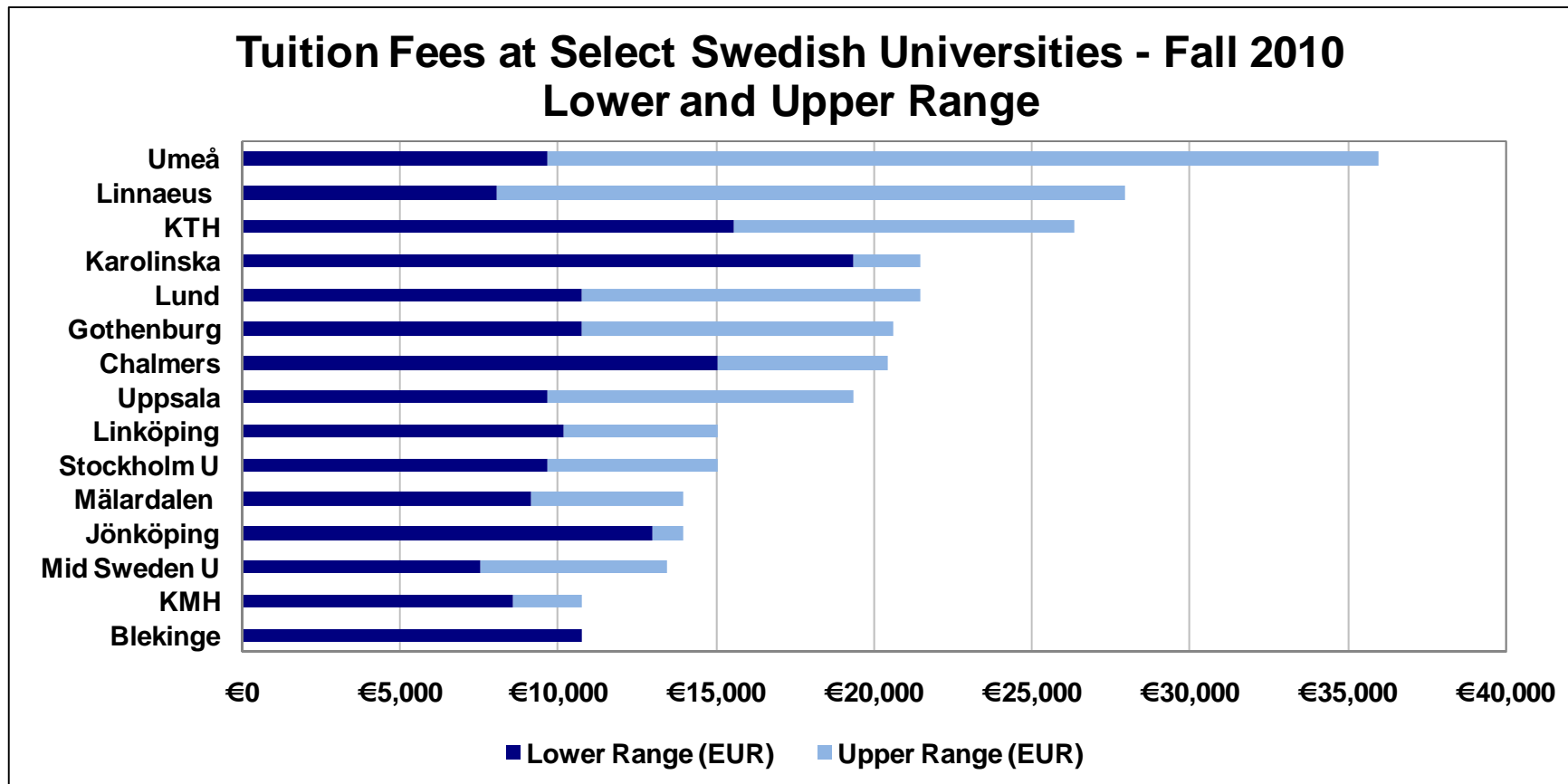
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A BRIEF RECAP OF THE INTRODUCTION OF TUITION FEES

- **After years of discussion, the Swedish Government passed the bill “Competing on the basis of quality – tuition fees for foreign students” in the spring of 2010. It went into effect on 1 July 2010.**
- **Most but all Swedish universities struggled with putting strategies as well as the many interlocking operational details into place by the fall of 2010.**
- **An application fee of SEK 900 was set, covering up to four choices.**
- **By the winter of 2010, Swedish universities had published their fee tables.**
- **The application cycle opened on 1 December 2010 and closed on 18 January 2011.**
- **Applicants were notified of decisions starting in late April 2011.**

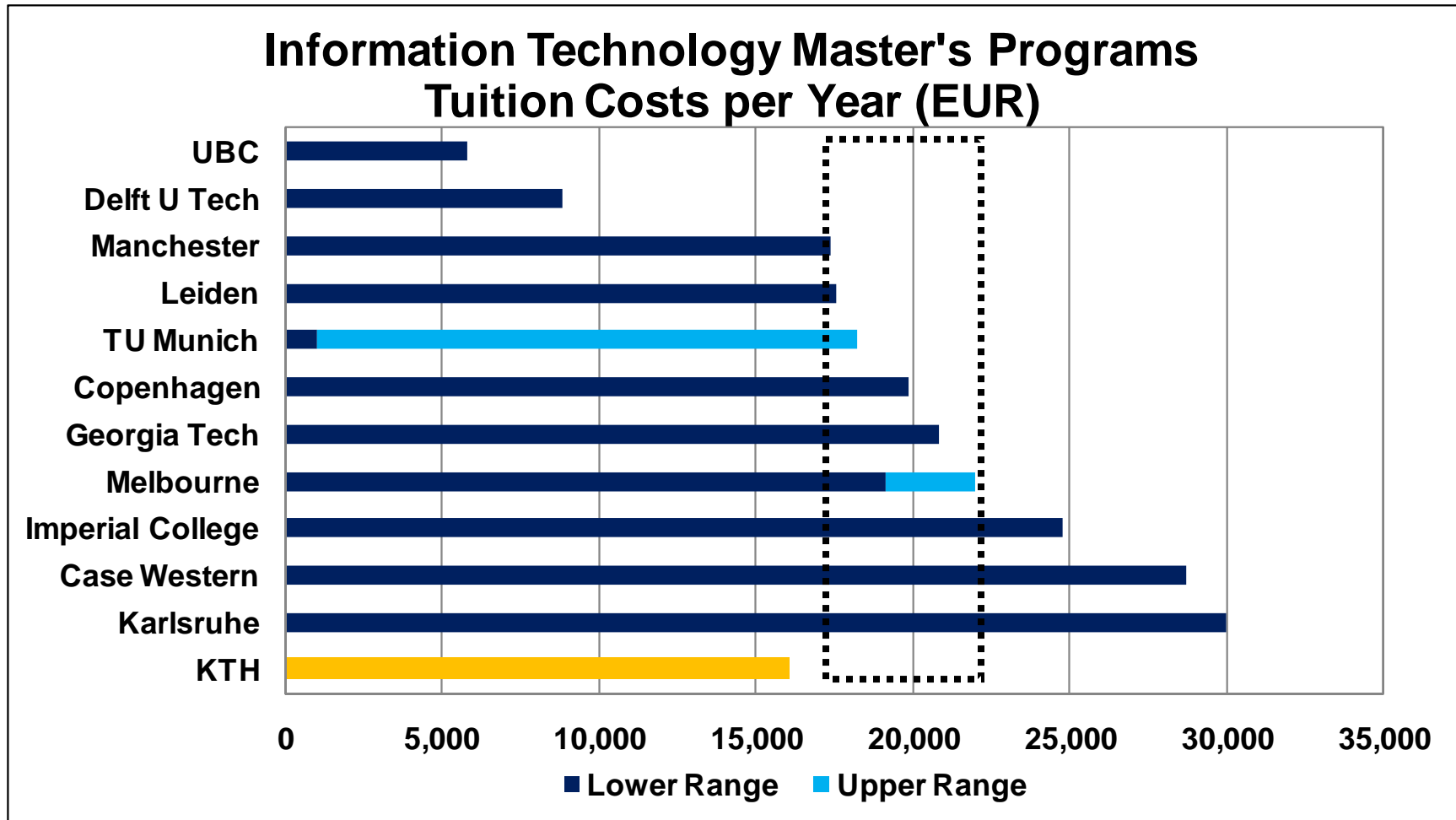
SAMPLE OF 15 SWEDISH UNIVERSITIES' TUITION FEE BANDS



Notes: Data as of 24 November 2010. This list is not complete. Lund University lists tuition fees by individual program.

Sources: Blekinge Institute of Technology, Chalmers University of Technology, Jönköping University, Karolinska Institute, KKH, KMH, KTH, Linköping University, Linnaeus University, Lund University, Mälardalen University, Mid Sweden University, Stockholm University, Umeå University, University of Gothenburg, Uppsala University.

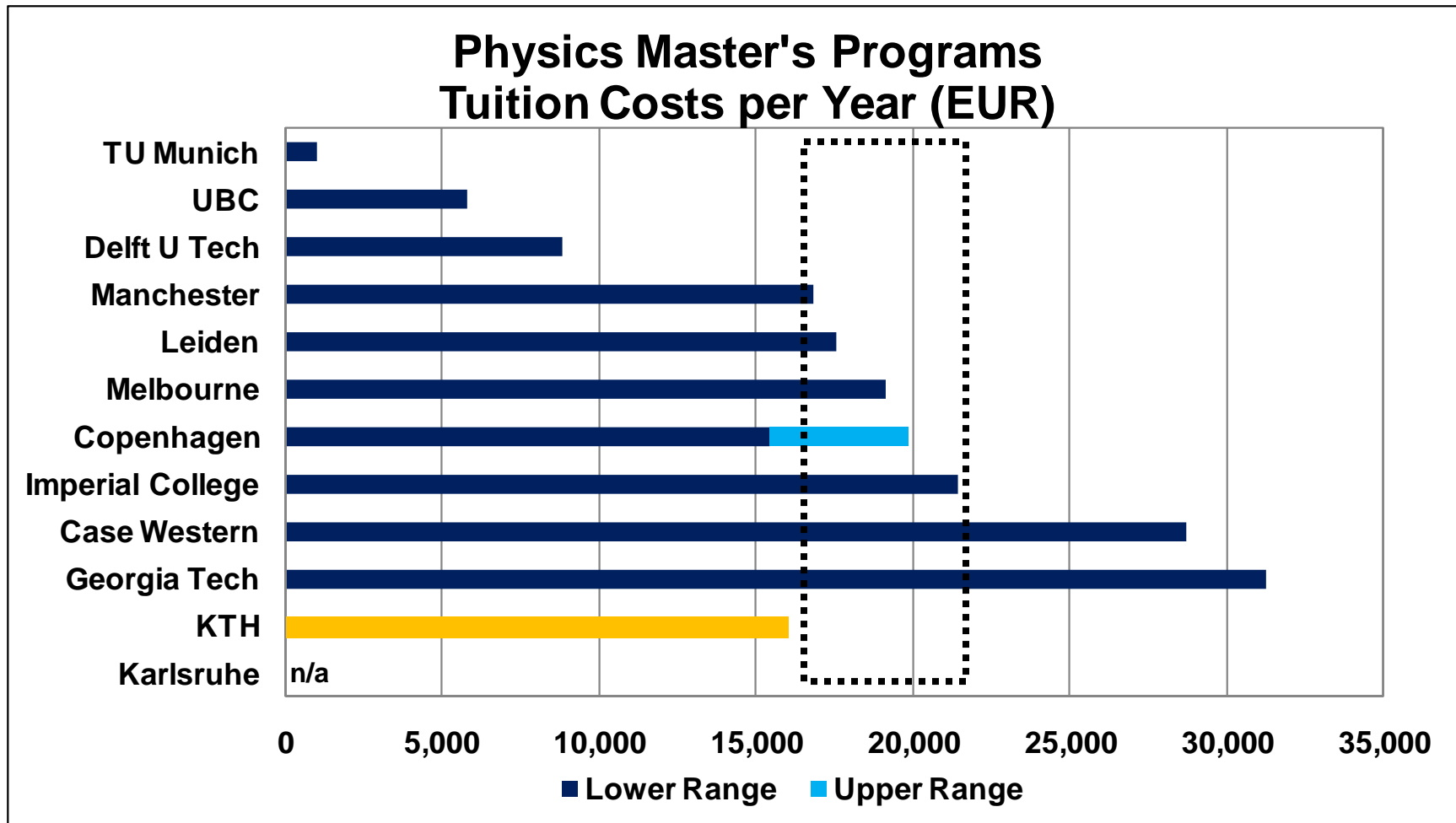
MASTER'S PROGRAM BENCHMARKING: INFORMATION TECHNOLOGY (FEES)



Information Technology Programs have a fee bracket (Euro 17-22,000)

Sources: Universities, ICG.

MASTER'S PROGRAM BENCHMARKING: PHYSICS (FEES)



Physics Programs have a fee bracket (Euro 17-21,000)

Sources: Universities, ICG.

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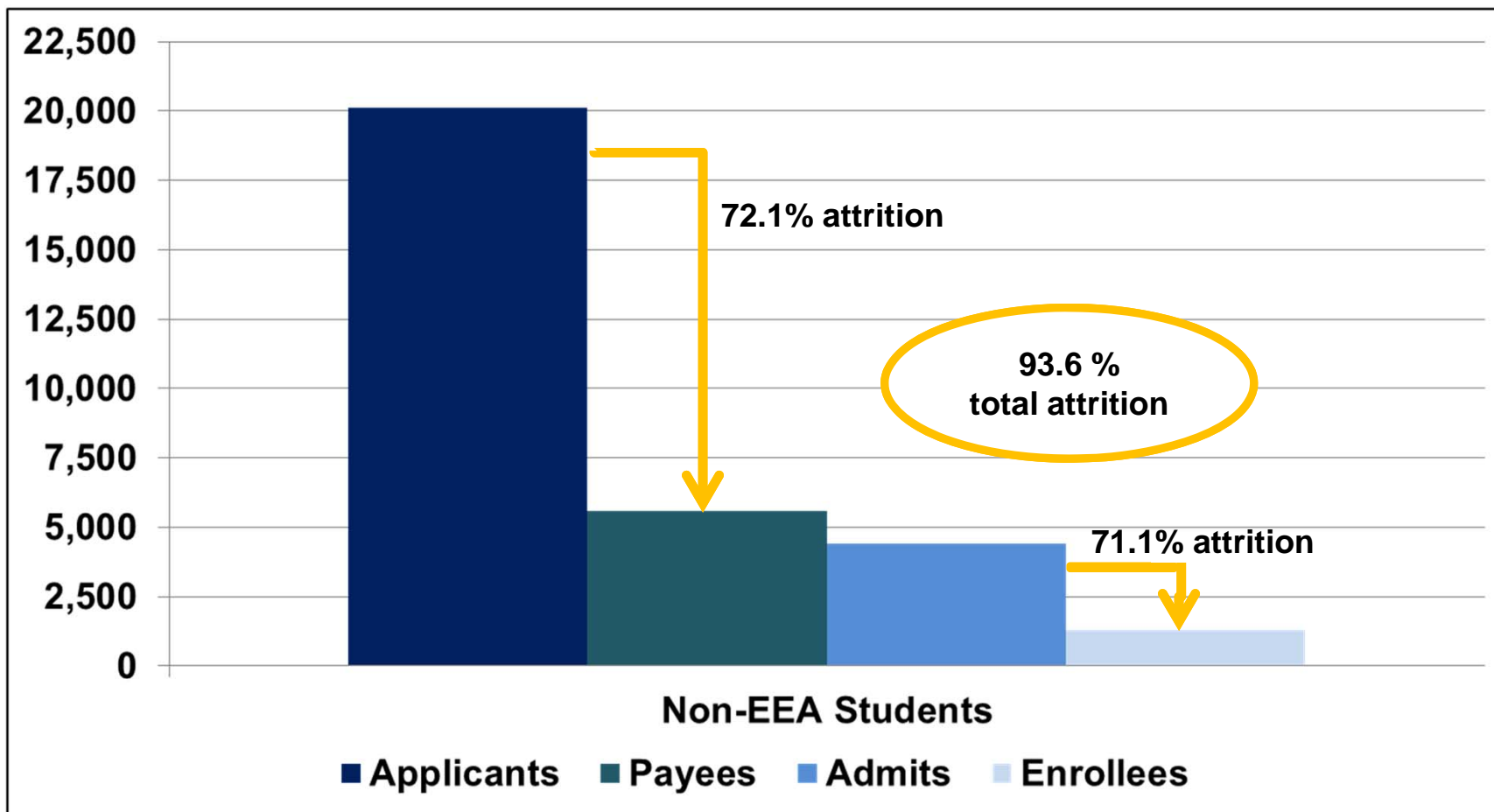
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AY 2011-12 APPLICATION TO ENROLLMENT INTERNATIONAL STUDENT PIPELINE SEGMENTS



Massive attrition in two segments of international student pipeline

Notes: Enrollee data is preliminary and assumed at 1,280.

Source: VHS, University World News. .

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ANALYSIS OF STUDENT PIPELINE ATTRITION ISSUES – THREE CRITICAL ISSUES REQUIRE ATTENTION

- **Swedish universities faced multiple challenging issues in their international student recruiting pipeline**
 - **A late and largely unprepared start into a tuition-fee based recruiting landscape**
 - **Limited (insufficient) resources for new/different international marketing and recruiting operations**
 - **A historical source country portfolio which did not map well to the new tuition fee requirement**
 - **Limited funding options for international students**
 - **Changes in internal governance, operational, and skills requirements**
- **More critically, Swedish universities face three serious issues in their international student recruiting pipeline**
 - **The application-to-decision timeline and cycle was (and remains) unaligned with competitive realities**
 - **Support tools such as studera.nu (and now universityadmissions.se) were flawed and constituted a competitive malus**
 - **The cost, complexity, and fragmentation of the application process was (and remains) a key contributor to students deciding against studying in Sweden**

CRITICAL ISSUE ONE – TIMELINE AND CYCLE


- **Both application and admissions cycles in Sweden have and continue to be misaligned with competitive realities**
 - **The lack of direct university ownership and control makes achieving the needed adjustments difficult**
- **Even if the application cycle is pulled forward (or more than one cycle is run), the calendar day for delivering a decision to an applicant is simply too far in the calendar year**
 - **Competitor institutions issue admissions letters to applicants as early as January (“regular” northern hemisphere cycle)**
- **Competitor universities operate with multiple intake cycles, rolling admissions models, fast processing times (sometimes within days), powerful IT solutions, and a process-excellence model**
 - **Swedish universities face a substantial competitive gulf, including the near complete absence of actionable intelligence**

CRITICAL ISSUE TWO – SUPPORT TOOLS (I)

- **studera.nu and now universityadmissions.se were/are intended as portals for international student applicants**
- **Both were/are seriously flawed from multiple evaluation view points**
 - **Language usage**
 - **Web design**
 - **Click-through flow**
 - **Imagery**
 - **General user friendliness**
 - **More**

CRITICAL ISSUE TWO – SUPPORT TOOLS (II)

Welcome to Universityadmissions.se



A website for you, the international student

Every year, many international students choose Sweden as their destination for university studies.

There are 52 universities and university colleges in Sweden, offering courses and programmes at the bachelor's, master's and doctoral levels.

This website is here for international students wishing to study in Sweden. Here, you can find out more about the educational system, learn about other important agencies and find links to their websites and, most importantly, apply for courses and programmes.

Simplistic language talks down to student // no mention of quality/specific attributes // front loads “agencies” role // use of “courses and programs” can fundamentally mislead a potential applicant

Notes: Screen shot from 13 September 2011..
Source: www.universityadmissions.se .

CRITICAL ISSUE TWO – SUPPORT TOOLS (III)

The screenshot shows the University Admissions website interface. At the top left is the logo for 'UNIVERSITY ADMISSIONS.SE'. To the right is a 'Log in (or create an account)' link. Below the logo is a 'Courses & programmes' section with a stack of books icon and the text 'All you need to know'. A search bar is prominently displayed with the text 'Search for courses at all universities for Spring 2012'. A green search button with a magnifying glass icon is to the right of the search bar. Below the search bar is a link for 'More search options'. In the center, there is a calendar for the month of September 2011, with the 1st of September highlighted in blue. To the left of the calendar is a section titled 'University Admissions in Sweden' with a welcome message and a photo of a woman. To the right of the calendar is a section titled 'What's happening now?' with a '1 SEP' icon and the text 'Last day to complete your application'. Further right is a 'Study in Sweden' button with a globe icon. At the bottom right is an 'Important links' section with several links: 'Antagning.se, Swedish admissions', 'Fees and scholarships', 'Key dates', and 'Application timeline and checklist'. Below this is a 'Have a question? Contact us!' link.

Unfortunately, it is already “too late” to apply...

Notes: Screen shot from 13 September 2011..

Source: www.universityadmissions.se. .

CRITICAL ISSUE TWO – SUPPORT TOOLS (IV)

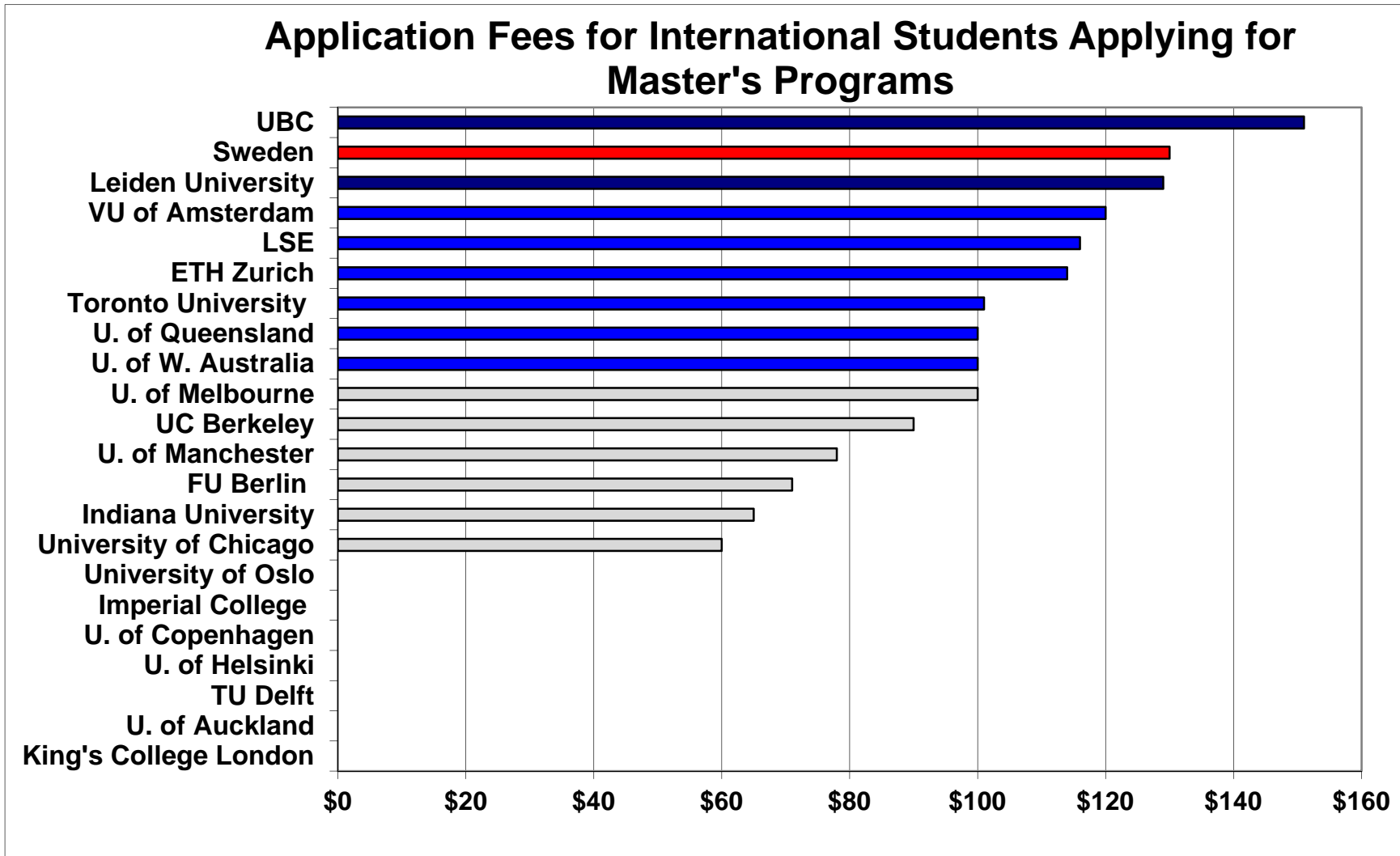
The screenshot shows the University Admissions website. At the top left is the logo 'A UNIVERSITY ADMISSIONS.SE'. To the right is a 'Log in (or create an account)' link. Below the logo is a 'Courses & programmes' section with a stack of books icon. A navigation menu contains 'Studying in Sweden', 'Applying for studies', 'Finding out more', and 'Frequently asked questions'. Below the menu is a search bar with the text 'What are you looking for?' and a 'Find' button. The main content area features a blue arrow icon and the text 'First day for students to apply for Autumn semester 2012'. The main heading is 'First day for students to apply for Autumn semester 2012'. The text below reads: 'Application to courses and programmes for the autumn semester 2012 opens here on Universityadmissions.se on December 1. Students who wish to apply for international courses and programmes at the bachelor's and master's level can search for what interests them and submit their application. Please remember that the last date to apply for autumn semester is January 15, 2012. For more information on applying for admission in Sweden, you can start with [Overview of the applicaiton process](#).'

**This screen shot is indicative of an uncompetitive, error-laden approach:
A very visible typo, incorrect wording, non-standard spelling, incorrect date of application cycle opening, and so on**

Notes: Screen shot from 13 September 2011..
Source: www.universityadmissions.se.

CRITICAL ISSUE THREE (I)

International Master's Application Fee Comparisons



Source: Institution's websites.

Notes: Exchange rates calculated on 7 January 2011.

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- **The competitiveness of the entire application-to-conversion segment chain in the recruiting pipeline is compromised. This pertains to underlying systems as much as to client-centric interfaces or service levels**
 - **Little will be accomplished without addressing this issue**
- **The mis-timing of the application decision cycles is directly responsible for forcing applicants to accept offers from competitor institutions.**
 - **This issue is one of the more easily fixable items but needs to be based on global benchmarking**
- **Application costs are at the top of the global benchmark list**
 - **There are a number of creative solutions to satisfy national requirements yet off-set costs for applicants**

STRATEGIC OPTIONS GOING FORWARD – STRATEGIC AND TACTICAL ISSUES (I)

- **Marketing and recruiting**
 - **Recruiting fairs**
 - **Agents**
 - **Feeders**
 - **Foundation/bridge programs**
 - **Collateral**
 - **Institutional websites**
 - **Web 3.0 engagement**
 - **Joint activities (domestic)**
 - **Joint activities (international)**
 - **Partnerships (academic)**
 - **Partnerships (business)**
 - **Other**

STRATEGIC OPTIONS GOING FORWARD – STRATEGIC AND TACTICAL ISSUES (II)

- **Revised target markets**
 - Addressed in the SDS report
- **Portfolio re-design**
 - The number, nature, and composition of programs needs revision
- **Funding**
 - Scholarships help, but are not the answer
- **Value-Add**
 - Alumni network
 - Internships
 - Placements
- **Market intelligence**
 - Research on markets, modes, segments, behavior, competitors, etc.
 - Forecasting and predictive modeling

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