



The image shows a table of contents for the report. The title "Overview" is on the left, underlined with a red line. To its right is a vertical list of bullet points. The JWT logo is in the top right corner. The bullet points are: "The Impetus", "Branding", "Research Objectives", "Methodology/Sample", "Key Findings:" (with three sub-bullets: "Choosing an Institution", "Universities' brand images", "Conclusions by objective"), and "Implications for institutional branding/recruiting".

Overview	<ul style="list-style-type: none">• The Impetus• Branding• Research Objectives• Methodology/Sample• Key Findings:<ul style="list-style-type: none">• <i>Choosing an Institution</i>• <i>Universities' brand images</i>• <i>Conclusions by objective</i>• Implications for institutional branding/recruiting
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The Impetus

- Research shows the increasing role that a brand plays in a student's choice of institution.....but

an institution's brand also impacts:

- Its ability to attract, recruit and retain quality staff both academic & professional;
- The outcomes of its students;
- Its ability to raise research and philanthropic funds;
- Its overall ranking; and
- Its profile/relationship within its local community



The Impetus

- The market place is more cluttered and competitive than ever before, with students needing help to make sense of its complexities and to make important decisions about which learning establishment to invest so much of their time, effort and money with.
- As more people go to university, the difference between individual qualifications will lie less in the fact of having a degree and far more in where the qualifications came from.
- Communicating the quality and worth of the qualifications and the establishment awarding them in a compelling and believable manner will be fundamental in providing a sound basis on which to compete.
- All of which reinforces the need to build a strong brand



Branding Defined

- *Brand n. comes from the Norse word Brandr, meaning literally to burn*
- It is a means of identifying a product, service, a company, even a nation
- Amalgam of tangibles and intangibles: features, services and benefits that create and sustain an on-going relationship
- The emotional and relational bonds that brands establish are what distinguish them as brands
- Most importantly, it is not what we say about ourselves, but *what others say about us*



Branding Defined

- Your target audiences determine your Brand - you can only manage it by attempting to influence their:
 - Awareness
 - Perceptions
 - Familiarity with the brand
 - Experience with the brand
- A brand is a set of convictions that surrounds a product/ service in the consumer's/ student's mind it's image is derived from all that impact the target audiences' perceptions of it: its products and services; its rankings; physical buildings; personality; experience; reputation and identity/logo
- Products/ services are what organisations want to sell - brands are what people want to buy (Culture, persona, "what's different")



Education Branding

The same principles that drive consumer branding can be transferred to the building and maintenance of education/service brands

A strong brand provides sustainable competitive advantage



Research Objectives

1. Better understand the role and significance of an institution's brand to students in their decision making process to consider, choose and remain with an institution
2. Investigate how education branding is similar to and different from that of retail products and/or services branding
3. Identify the key insights for institutions to assist them in branding and recruiting efforts

**Methodology/
Sample**

- 10 focus groups comprising 7-9 participants:
 - 3 Australia
 - 2 city, 1 regional
 - 2 Continental Europe
 - 2 China
 - 1 Singapore
 - 2 US
 - *Most groups recruited from same uni, but one of Chinese groups included students from four unis*
- Undergraduate students
- 4 more groups to be conducted
- Followed by extensive quant work

***Choosing an
Institution***



Choosing an Institution

- **Factors taken into consideration (in approximate order of mentions)**
 - Reputation/prestige/brand name
 - Ranking
 - Course availability
 - Entry requirements
 - Environment/feel
 - Friendliness/social life
 - International character
 - Alumni (China)
 - Affordability (Singapore)
 - Teaching style/learning atmosphere (China and Singapore)
 - Facilities
 - Location/proximity
 - Money/cost
 - Size

Reasons Students Ultimately Decided to Study at Their Current University



	Overall	UK	Aust
Offered particular course/qualification I wanted	40%	41%	39%
Reputation of institution as a whole	36%	47%	32%
Course/qualification highly respected in my field	18%	21%	16%
Living expenses cheaper than many other institutions	12%	6%	15%
It was recommended to me	9%	6%	11%
Good career prospects	9%	14%	7%
Convenient location/easily accessible	8%	7%	8%
Only/first place I received an offer	8%	5%	9%
Relatives/friends studying there	8%	2%	10%
Family wanted me to study here	8%	12%	6%
Relatives/friends living near	7%	6%	7%
Tuition fees cheaper than many other institutions	6%	5%	6%
Good on-campus/accommodation facilities	4%	3%	4%
Offered a scholarship here	3%	7%	1%
Number of international/Asian students	2%	5%	1%
Other	11%	8%	13%
No response	1%	2%	0%
Sample size	519	155	364

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By Country

1. Australia, regional	Reputation , proximity, environment, atmosphere
2. Australia, city	Reputation , atmosphere, physical environment,
3. Australia, city	Reputation /job opportunities, atmosphere
4. Europe, city	Reputation , ranking, international, business
5. China, city	Location, ranking, course availability, prestige/ reputation
6. China, city	Learning atmosphere, practical experience, self- development, course availability
7. Singapore	Course availability, affordability, teaching style/quality
8. US, city	Size, location, atmosphere, cost

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Choosing an Institution

Prestigious reputation appears to trump all other considerations

- For students, going to a prestigious institution helps to distinguish oneself from one's peers (with a better regarded qualification)
- Prestigious seems to resonate as a statement of establishment, tenure (old school) and sometimes pertaining to academic excellence but not exclusively.

"I think prestige is still pretty important and if you get a choice of different offers, you are more likely to go to the most well-known and prestigious one." (Australia)

"I will probably transfer to another uni next year as I'm not really liking the course. I would prefer to go to Melbourne as the whole prestige thing is getting to me. My friends sometimes make me feel small." (Australia)

"An overarching thing is name - a big name that you could throw around (not that I'd want to admit that). I don't want a no-name school. So I'd say more prestigious (which is old). It's just something you know from hearing the name." (US)



Choosing an Institution

Reputation trumps all other considerations

- Students (in Australia) speak in terms of the 'tiers' (And always rank theirs higher than other people do)
- Choosing an institution on the basis of reputation is an easy decision to make:
 - it pleases everyone, especially parents
 - it requires less information seeking, you just go to the best known place
 - no risk strategy



Building a reputation

- Most students did not specify or were not able to easily articulate how they came to perceive an institution as prestigious/having a good reputation.

- Some of the sources that they mentioned were:

- Awareness
- Hearing about it in the media

"If you hear that a particular academic has published some research." (Australia)

- Word of mouth:
 - including teachers
 - peers
 - family



Building a reputation

- Alumni

"Looking at alumni, looking at leaders in architecture and see where they are from." (China)

"Ranking and tracing where the famous law people from." (China)

- An awareness that there are high entry requirements

"Entry score and reputation. Melbourne and Monash are really difficult to get into as they are really good unis." (Australia)



Choosing an Institution

So what about less prestigious institutions?

- Those students who don't qualify for academically elite/prestige institutions tend to have a longer list of factors that they take into consideration in making their decision

- Students acknowledge that there are other elements that can make for an enjoyable university experience

"Focus also the culture, wellness, and human side of the university - they are important factors for us to consider." (Australia)

- The experience of attending appears more important: if they're not going to get the most highly rated qualification, at least it should be enjoyable



Choosing an Institution

So what about less prestigious institutions?

- There are also trade offs between some of these factors, e.g. hard to argue prestige AND fun
- However, many people thought there was also a trade off between prestige and quality. They gave examples of the unhappy experiences of students at prestigious institutions.
- Then there seems to be a group of people who while academically (and financially) could have qualified for an academically prestigious school they have a strong sense of what they wanted beyond the generic prestige and went for the total package that they felt would better meet their needs and values and better position them for their career choices.

"I was concerned that I was stepping down a level in terms of prestige, but I'm happy to discover it was the right decision."



Information sources

Australia, regional	Rankings, websites, open days, word of mouth
Australia, city	Reputation, advertising, websites
Europe, city	(very thorough) Word of mouth, rankings, websites (including discussion boards)
China, city	Teachers, ranking, information about alumni, open days, school seniors
Singapore	Website, open days, word of mouth
US, city	Career counselors, websites/search engines, visits, ranking books

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Information sources

- Students seem to value open days/visits more than any other source

"We had a day with a student where we followed them around all day and got to see the uni through the eyes of a student, which was really good. We got information packs and got to ask lots of good questions." (Australia)

"Inviting top students in secondary school to go for one week field visit." (China)

"At college visits – that's when I really felt I knew what I wanted and didn't want." (US)

- Can allay some of their considerable concerns about how it will actually feel to be at any/this university

"My school did a trip to [uni] and I liked it so that was what really sold me." (Australia)

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Information sources

"Open day where you could do a day like a science student or a law student, where you could go to lectures and be like a student. Go to a few classes to get a feel for it and give you more of an idea of what it's like to be a uni student." (Australia)

- However, students appear to prefer to attend without parents

"Taking year 11 and 12 students to the universities and let them speak to some lecturers and some existing students. When you are there for open days, the parents take over and sometimes you don't get to ask the questions you want to ask." (Australia)



Information Sources

Rankings can also be a useful device

- They are perceived to be factual and based in the present (whereas prestige could just be due to past successes or longevity)
- Students, at otherwise less elite schools, also appear to be well aware of their respective institution's success in ranking tables
- Some students actually specify sources, but others just talk about general rankings

"Elsevier magazine, Time magazine." (Europe)

"The well known ones, Financial Times and others." (Europe)

"Barron's, specialty magazines like Time, Newsweek and US World News and Report" (US)

Other sources

Websites/internet a growing source

- Students visit websites in order to get factual information, for example about courses

"Going straight to the internet is so easy so there is no point in asking the university for brochures." (Australia)

"On line - I did almost everything on line. I didn't know where to start so I typed in college search on Google. I used Fast Web - a scholarship search engine mostly but you can also find colleges there. Everything was on line. I had a five-paged spreadsheet. I couldn't get any printed materials because I was away on my junior year abroad." (US)

- Not only did they provide factual information, these websites also provide them with a feel for the university and its brand
- In Europe and the US students are clearly very web-savvy, and talk about their use of discussion forums to gather independent, but first-hand information about specific institutions.
- An expected increase in this type and other forms of communication means it will be very difficult for non-performing universities to sustain a positive brand image.



Other sources

Word of mouth, friends, family, seniors, career counsellors and teachers

- Word of mouth provides invaluable first-hand knowledge

"I asked trustable contacts." (Europe)

"I relied on the opinions of my older friends and checked the rankings." (Europe)

"You take someone's opinion that you know rather than someone you don't know." (Australia)

- Parents and siblings are often a source

"I had discussions with my parents – my school counselor wasn't very good and we only had one for all of us (I came from a small school). But my dad was really into it. My mom said "she'll go where she needs to go" but my dad said, "well this school..." and he would cite a statistic. He told me what schools were good at what." (US)



Other sources

Word of mouth, friends, family, seniors, career counsellors and teachers

- Careers counsellors, teachers and professors are seen as an independent source

"I spoke to teachers and [institution] had a good reputation." (Australia)

"I started with my college counselor in my school – she was very good. The basis came from there and then I went to collegeboard.com or Barron's. I went to a very small private school and we each had tons of time with our counselor. I knew mine very well, she was my Spanish teacher." (US)



Persuasive sources and influences

A lot say they ultimately made the decision themselves, conducting their own research online

"It was my decision and I just told my parents what I was doing." (Australia)

- *"My mom would point out mail from colleges. I was fine on my own. I didn't get any negative influence. I don't think I needed help. I think I kind of did OK by myself."*

"I knew that if I let my parents tell me where they wanted me to go or where they thought I should go that that's where I would go. So I only went to them with specific questions and I didn't want it to be their decision so I was very careful about that." (US)

- As well as being information sources, parents may play a role in the decision, particularly if they are funding it, and for cultural reasons in certain countries (China) and for certain groups (Asian students elsewhere in the world)

"When you are from an East Asian culture like me, there is always pressure for an academic success." (Australia)



Universities' Branding

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**University 1:
Australia,
Regional**

What looking for	Reputation, proximity, environment, atmosphere
Brand perceptions	Leafy, laidback <i>"It's by the sea, so you just expect it to be a bit more relaxed and easy going."</i>
Sources	Rankings, websites, open days, word of mouth
Matches expectations	Yes, matches rational expectations
Comments	No real sense of the university brand. Most chose because it was the closest institution.

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**University 2:
Australia, City**

What looking for	Reputation, atmosphere, physical environment
Brand perceptions	Fun, career opportunities
Sources	Reputation, advertising, websites <i>"Through their advertising and the website, it is not as stiff as some others."</i>
Matches expectations	Good environment, but lacking prestige which may affect opportunities
Comments	Strong, distinctive branding, clearly communicated and delivered upon. Still some residual issues relating to reputation.



**University 3:
Australia, City,**

What looking for	Reputation/job opportunities, courses, atmosphere
Brand perceptions	Young, innovative, opportunities, success
Sources	Visits, website, word of mouth
Matches expectations	Brand matches up to expectations
Comments	Brand is moderately strong, though still compared (unfavourably) with other, more prestigious institutions



**University 4:
Europe, City,**

What looking for	Reputation, ranking, international, business
Brand perceptions	Multicultural, diverse, part of team/class, serious
Sources	(very thorough) Word of mouth, rankings, websites (including discussion boards)
Matches expectations	Mixed/disappointed, not well organised, bureaucratic, no feeling of community
Comments	Clear brand position, but questionable whether it can be maintained given student experience



**University 5:
China, City**

What looking for	Location, ranking, course availability, prestige
Brand perceptions	Transformative, success <i>"An university that can transform me into a successful person with successful icons."</i>
Sources	Teachers, ranking, information about alumni
Matches expectations	Disappointment at quality of teaching, but somewhat expected of Chinese institution
Comments	High expectations of university as a place of self-development; reality does not match up.



**University 7:
Singapore**

What looking for	Course, affordability, teaching style/quality
Brand perceptions	Transformative, innovative <i>"Study in a place that is world class, transform me into something wow."</i>
Sources	Website, open days, word of mouth
Matches expectations	Yes, generally satisfied
Comments	Students aware of (attempts at) branding, but did not see their institution's position as personally relevant.

University 8: US City	What looking for	Size, Location, atmosphere, Cost/money
	Brand perceptions	Community atmosphere, involvement, internationalisation/culturally diverse, great location
	Sources	Career counselors, websites/search engines (collegeboard.com), book rankings, onsite visits,
	Matches expectations	Yes <i>"It is so much better than I thought it would be"</i>
	Comments	Desire for specific experience of internationalised campus with specific course offerings, size, location and money superseded desire for prestige



Research implications



Research Objective #1

Better understand the role and significance of an institution's brand to students in their decision making process to consider, choose and remain with an institution

Implications

- An institution's brand is fundamental in students' decision making process by the mere fact that students are looking for a very specific relationship with a university with both tangible and intangible features.
- As more and more students recognise the need to qualify themselves in terms of their career desires first by their choice of institution, students have a growing interest in understanding and believing in an institution's brand promise – what's in it for me?
- Students are starving for the most relevant, easily accessed information about universities to assist them in their decision making process – for many it is an overwhelming experience and those institutions that can ease the pain benefit



Objective #2

Investigate how it is similar to and different from that of retail products and/or services

Implications

- Key similarity between education branding and retail product/service branding – it *must* be customer/client centric, meaning it is imperative to:
 - a) *define who is your target audience*
 - b) *understand the needs and values of your target audience*
 - c) *identify most relevant segmentation to guide the most effective development of branding strategies*
- You need to know what's important to them, what they want to know about you, how they want to receive/access that information and when to provide that information during their busy lives



Objective #2

Investigate how it is similar to and different from that of retail products and/or services

Implications

- The same tenets of retail products/services branding apply to education branding
- The decision making process for students is very experientially based – critical in all branding initiatives.
- Whatever you claim to offer as unique and ownable must be a constant element of the student-university relationship at all touchpoints

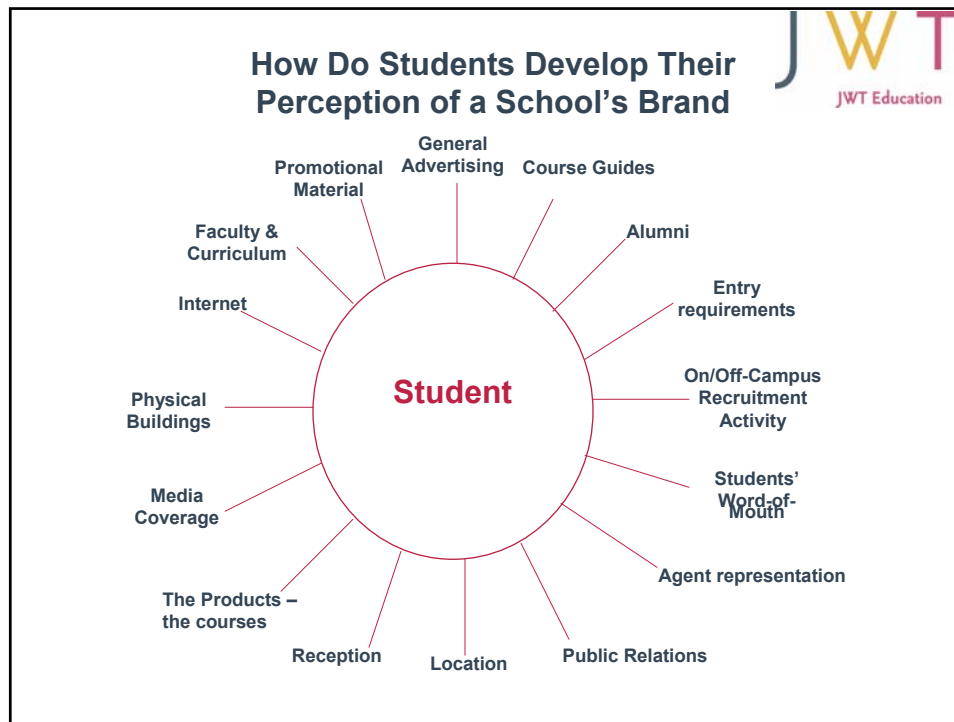


Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

Manage sources that build perceptions

- Internet a key and growing source: university websites
- Interesting that many sources used to gain perceptions are often those not controlled by universities (e.g. word of mouth, discussion boards)
- Opportunities for 'real' experiences of the brand, such as Open days work very well: they play an important role in getting a sense of what kind of place it will be (ie the brand)



Need to deliver on the 'brand promise'

Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

- It seems the more prestigious the reputation, the more likely the students are to be disappointed – the more the institution has to 'live up to'
- By comparison, those with less well regarded academic reputations often turn out to have other unexpected strengths and over deliver
- There seems to be an inverse relationship between reputation/prestige and having an enjoyable/quality experience
- Non-prestige institutions may to fight harder to find things that will appeal to students; prestigious ones don't have to try so hard; could be that the nature of the focus on academic makes them less 'fun'
- There is a general 'hying' associated with universities: it is so much the focus of education, that people have very great expectations, that are rarely fulfilled.
- Having a clear and well communicated brand positioning is meaningless if the promise is not met by reality....it's damaging to the brand

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Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

The Issue of Academic Reputation

Even at those institutions which have developed a clear, non-prestige based branding, the issue of reputation still arises

- However, it seems likely that with increasing recognition that institutions can excel in specific disciplines, the issue of overall 'prestige' is likely to diminish
- Moreover, improving communications (internet) may mean that prestigious institutions cannot rest on their laurels
- With an increasingly fee-paying clientele globally, students will demand quality (as well as a recognised qualification) – they are increasingly behaving like consumers and will change brands based upon their experiences



Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

The Emergence of Value Segments

- The students we talked to have different needs: some are looking for purely rational elements; some have emotional needs; and some want both; and some are willing to trade one factor for another; whereas others are not
- Some do not seem to know what they want at all: they are too overwhelmed by the very notion of 'university' to be able to distinguish between the various choices
- Distinct value segments starting to emerge – groups of people who share common values and for whom the brand plays a similar role in their decision about which university to study at



Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

Developing a Brand Strategy

- First step is to develop a clear sense of your brand's current positioning, what do your stakeholders think about the brand and want from the brand
- From there to develop a vision for your brand and a brand architecture
 - More difficult to achieve in a collegiate, democratic institution such as a university, than in other environments
 - Requires some clear decision making, and championed from the top



Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

Developing a Brand Strategy

- The most powerful brands immediately convey a set of rational and emotional attributes, influencing the thought processes of the audience.
- The value of the brand lies in its ability to deliver on the promised attributes.
- Focus leads to clearer, more memorable brands. Trying to be all things to all people inevitably leads to weaker branding.
- Need to start from a strong, clear positioning strategy and a willingness to stand out from the crowd: you need to have a point of difference.
- Could you replace your name in your branding strategy with that of a competitor? If so, you need to re-think it!

" If I was [university], I would run away from what everyone else is doing. Like the emblem is like everyone else's..." (Australia)



Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

Communicating the brand

- Need to ensure that branding is clearly communicated and delivered at all points in the process.
- Successful brands have a branding strategy that influences the entire institution.
- Need to manage all communications of the brand so they have the same consistent message.
- Not just about developing a corporate identity, a logo and an advertising campaign or only about selling to customers.
- It's also about ensuring that the branding remains true and consistent for all those who have involvement with the brand.
- Requires a 360° process which reinforces the brand at each contact point.



Objective #3

Identify the key insights for institutions to assist them in branding and recruiting efforts

Communicating the brand

- Does your website truly position you as different from your competitors?
- Does it convey all your key attributes?
Hands on experience
- Give potential students as much of a real taste of what your university offers as is possible
- Utilise strategies that build word of mouth
- Send out undergraduates to talk first hand about their experiences

***Next steps:
Quantitative Testing***

**Quantitative
Testing**

- Global quantitative test designed to quantify our findings across a larger sample
- Identify whether these value segments do exist and to what extent and provide more information about who comprises these different value segments – who they are, the role of a brand in their decision of institution, their values, demographics and psychographics