



## Marketing and Student Recruitment Plan 2007-2010

### Contents

Executive summary.....	2
Current situation.....	3
Summary: Structural capability, tough local market, segment potential, PG focus .....	3
Marketing and Student Recruitment Division .....	3
Where Monash ranks.....	3
The international recruitment environment.....	3
The domestic (onshore) recruitment environment .....	4
Market and environmental analysis (international students).....	5
Market and environmental analysis (onshore students) .....	6
SWOT Analysis.....	7
The One Monash Challenge.....	8
Coordinated marketing effort .....	8
Critical internal and external partnerships.....	8
Effective and appropriate resources.....	9
Divisional objectives.....	9
Strategic marketing and student recruitment activities .....	9
International recruitment projections 2007-2010.....	10
Onshore opportunities from positive differentiation.....	11
Marketing to a wider range of stakeholders .....	11
Postgraduate and HDR focus.....	11
Enhanced International Admissions processes .....	11
Governance.....	11
Summary: Diverse source data and research, ongoing review, cost-effectiveness ..	11
Appendix 1: Marketing and Student Recruitment Action Plan 2007-2010 .....	13
Appendix 2: International Student Enrolment Projections 2007-10 .....	25

## Executive summary

The University sector and Monash face a challenging and increasingly competitive environment. The Marketing and Student Recruitment Division (the Division) plans to improve student recruitment outcomes by diversifying operations into emerging markets while also shoring up relationships and market presence in traditional markets. This approach has been planned after careful analysis, combined with market intelligence, cost-benefit analysis and dialogue with internal stakeholders.

This plan recommends a clear framework for achieving improved outcomes through intra-University collaboration, enhanced governance and a better analysis of return on investment for marketing and student recruitment operations across the University.

With the benefit of the University's considerable international presence and this strategic approach to marketing and student recruitment, Monash is well positioned to maintain and/or increase both the quality and quantity of commencing students.

This *Marketing and Student Recruitment Plan*, including the *Action Plan* (attached as Appendix 1) outlines the key strategies that the Division will employ to support the University's immediate objectives. Further detail is contained in the University Marketing, Student Recruitment, Postgraduate and HDR Recruitment, Monash Abroad, International Admissions and Advancement portfolio plans.

The Division, within the Advancement Portfolio, has a vital role in supporting the University in achieving its goals in education, research and international engagement.

The *Marketing and Student Recruitment Plan* should also be read in conjunction with a series of other University-wide plans: *Monash Directions 2025*, the *International Plan*, the *Education Plan (2006-2010)*, and the *Research and Research Training Plan (2006-2010)*.

For some time Monash has pursued an ad hoc approach to international student recruitment and brand positioning. In the past, the University has also suffered from a fragmented approach to student recruitment and marketing in terms of the domestic and international market. This resulted in mixed messages about the Monash brand and a paucity of forward strategy in student recruitment.

The Division was formed in mid-2005, uniting international admissions, student recruitment, marketing and Monash Abroad areas with domestic marketing and student recruitment.

This Marketing and Student Recruitment Plan provides a blueprint for marketing and student recruitment activities that align to the University's *Monash 2025* priorities and underpins the success already achieved in attracting talented students from Australia and offshore.

The unification of the central marketing and student recruitment operation in the Marketing and Student Recruitment Division has enabled a clear direction to be achieved.

The Division has five key objectives:

- 1. Increase and secure student revenue**
- 2. Attract and increase the number of quality students enrolling in Monash University programs and its pathways**
- 3. Increase the University's research, international and academic profile to support strategic objectives**
- 4. Enhancement of the Monash University profile to improve engagement with key stakeholders, internally and externally**
- 5. Ensure high quality outcomes through effective governance and measurement of marketing and student recruitment activities**

A clear priority of the Division is to increase the number of quality students enrolling in Monash and to secure our current student markets.

The importance of strengthening our markets and ensuring diversity was highlighted in semester 1, 2005. The number of new commencing international students at Monash University in Australia declined by 18%, with a reduction in international student numbers across a number of faculties. In semester 1, 2006, Monash recovered some of the lost ground from 2005 and increased international student commencements by 7%. The University now confronts the challenge of maintaining market share in a declining market. In view of this, the current

projection is that there will be 5% growth in Monash's international student enrolments in 2007, predicated on slow growth through until 2010.

## Current situation

**Summary: Structural capability, tough local market, segment potential, PG focus**

### Marketing and Student Recruitment Division

The Marketing and Student Recruitment Division was established in mid-2005 as part of the Advancement portfolio. It combines the areas of international marketing, student recruitment, admissions and Monash Abroad from the previous Monash International, together with the marketing, public affairs and domestic student recruitment activities of the previous MAPA Division.

Dual reporting relationships have been established with Advancement staff in Malaysia and South Africa, so staff now jointly report to the Divisional Director of Marketing and Student Recruitment as well as their respective PVC's. This new relationship aims to improve integration and resourcing of marketing and student recruitment operations for the Malaysia and South Africa campuses, with a strong emphasis on reducing duplication of effort.

Established in response to changing market dynamics and recommendations from the *International Self-Review 2004-05*, the Division delivers the following functions: offshore and onshore student recruitment, international admissions, marketing, Monash Abroad, media liaison, advertising, publications and Web content development.

Recent operational changes have resulted in better student recruitment outcomes, improved admissions processes and seamless integration of onshore and offshore student recruitment. The Division has also launched marketing and media campaign on 'Success begins with Monash' and 'Engaging the world' themes.

### Where Monash ranks

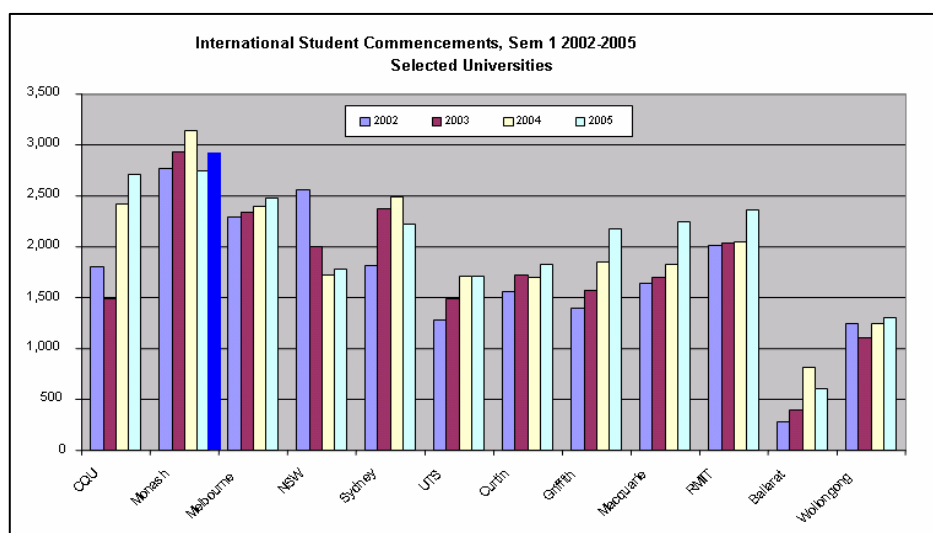
Monash University aims to rank as one of Australia's top three universities in research and teaching by 2008. According to the most recent rankings released by the Times Higher Education Supplement, Monash was ranked 33 in the world and 3 in Australia.

### The international recruitment environment

Monash faces a challenging and increasingly competitive environment in recruiting quality international students as the Division looks to sustain this important source of revenue to the University.

Monash University continues to attract more quality international coursework students than any other university in Australia (see Figure 1). However, Monash's share of new commencing international students declined dramatically in Semester 1, 2005, emphasising the need to work collaboratively with our agent network and better understand the international student decision making process and buying cycle.

**Figure 1**

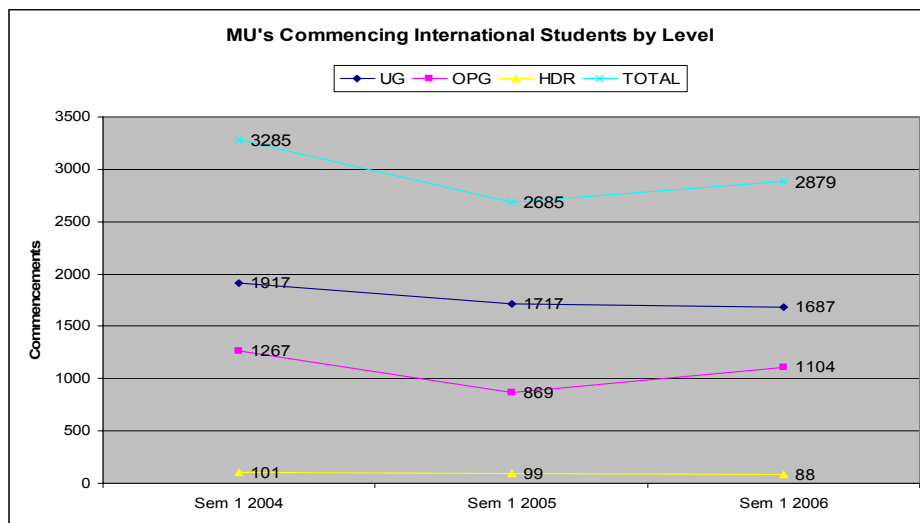


In the face of this decline and the forecast that the total number of international students to Australia has peaked, Monash needs to attract an increased share of the total international student market to Australia in order to maintain international student numbers.

In order to ensure a diverse student population while retaining sector leadership in international student recruitment, the strategy needs to be aligned to the University's international objectives. In addition, considerable attention needs to be paid to the disproportionate reliance on General Postgraduate (GPG) enrolments, (see Figure 2) with diversification of both source countries and student category expansion required to provide improved international student recruitment outcomes.

Considerable attention needs to be paid to increasing the recruitment of HDR students in particular, to support the University's research objectives. At present, Monash's proportion of international HDR students is below its Australian competitors, and in 2005 represented only 6.5% of the total international HDR market to Australia.

**Figure 2**

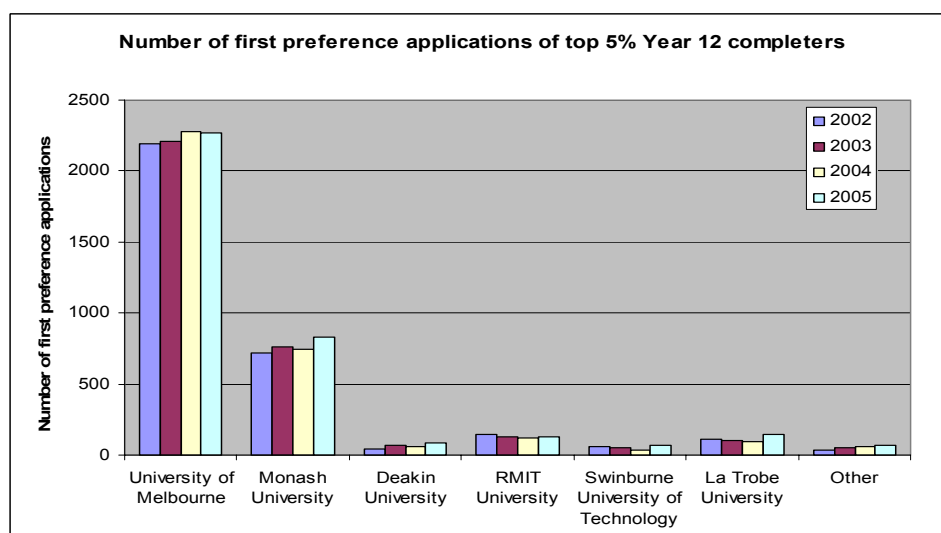


### The domestic (onshore) recruitment environment

On the domestic front, there is a clear need to boost the University's HDR numbers, GPG demand and share of the top 5% of students. Within the Victorian market, the University continues to compete primarily with Melbourne University (Figure 3) for the top 5% of students, although with the introduction of the *Melbourne Model*, the nature of this relationship is expected to change considerably.

The Division plans to improve domestic enrolments through a rejuvenated program of marketing and student recruitment impacting not only on Victoria, but also on interstate and New Zealand markets.

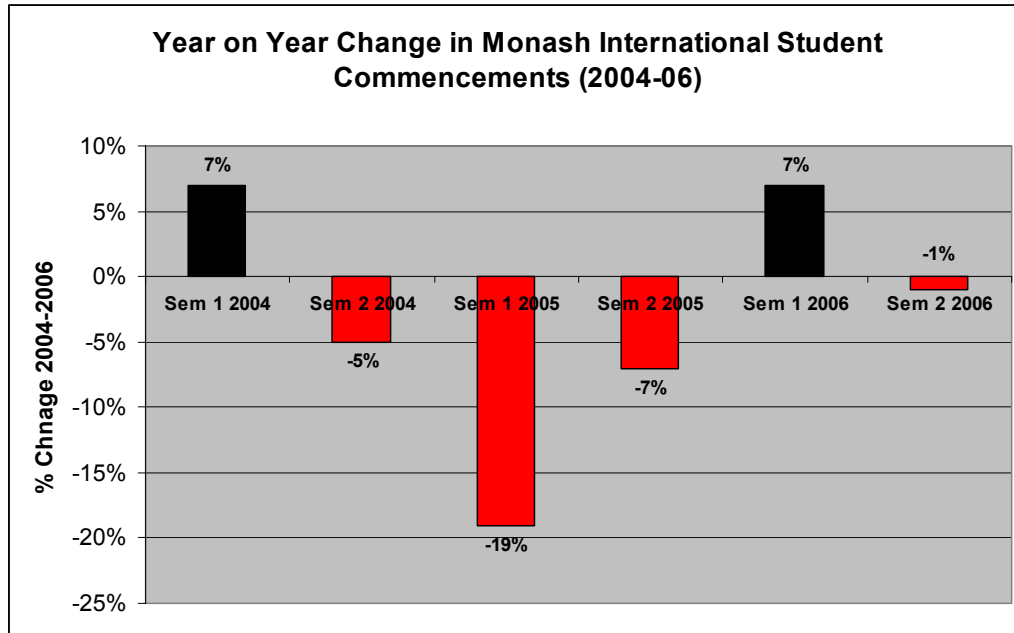
**Figure 3**



## Market and environmental analysis (international students)

The downturn for international student enrolments experienced in semester 1, 2005 was arrested in semester 2, 2005, and this upward recovery has continued in 2006 (Figure 4).

**Figure 4**

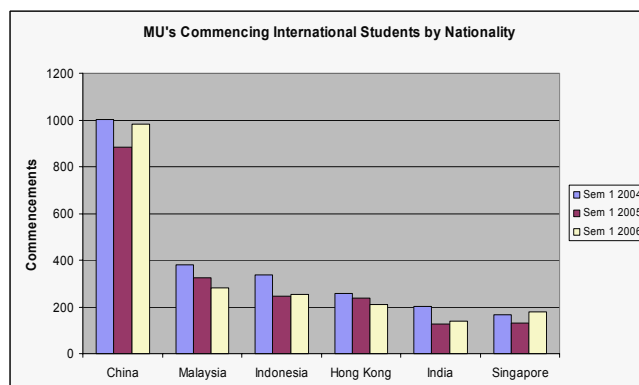


\* Note: post-census data for Semester 2, 2006 was not available at the time of producing this Plan. Comparisons for Semester 2 have been made against acceptance data available July 28, 2006

The recovery has been evident in traditional international markets (Figure 5), such as Singapore and Indonesia, and key emerging markets (Figure 6), such as Vietnam and South Korea, but the ongoing strength has been from China with growth in semester 1, 2005 to 2006 of 11%. In Semester 2, 2005 and semester 1, 2006, there have been strong GPG enrolments from the Faculty of Business and Economics, with less growth and some decline in other areas, such as undergraduate programs in the Faculty of Information Technology.

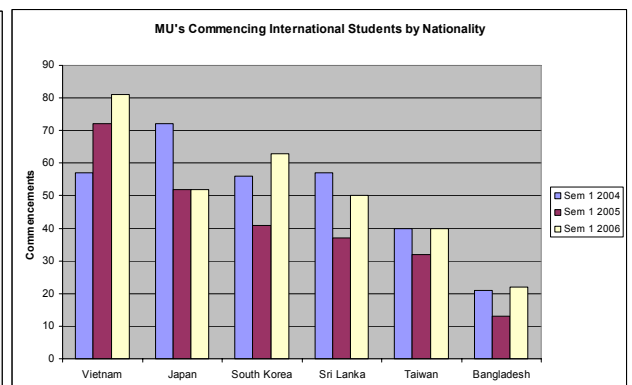
**Figure 5**

**Recovery in some major markets**



**Figure 6**

**Growth in some key emerging markets**

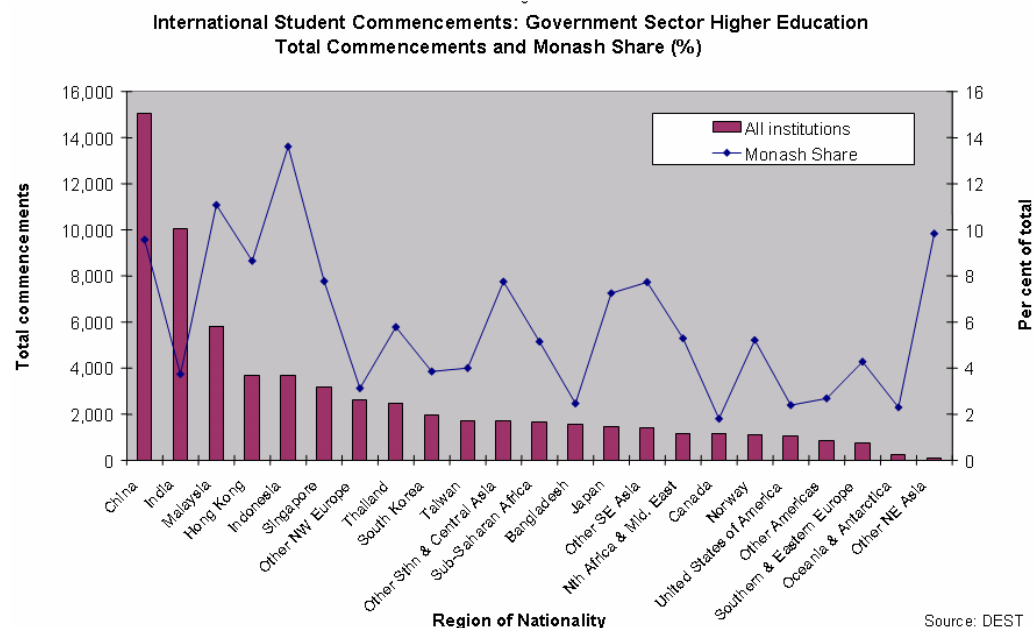


The Monash Malaysia and South African campuses have recorded positive recruitment outcomes in 2006. Monash South Africa's enrolment is in excess of 1,100 students and Monash Malaysia recorded growth of 13% in new student enrolments from Semester 1, 2005 to Semester 1, 2006.

While international student numbers to Monash University have improved recently, indications suggest minimal or negative growth expectations in international student commencements in

Australia. As a result of this forecast, greater emphasis will be placed on Monash gaining market share from competitors in order to grow international student numbers. Figure 7 demonstrates where unrealised market opportunities for Monash may exist.

**Figure 7**



### Market and environmental analysis (onshore students)

There has been a noticeable decline recently in international student commencements in the high school sector in Victoria. More students are undertaking their secondary studies within their home countries. The number of international VTAC students commencing at Monash declined 14% in semester 1, 2006.

There has been a demographic and locality shift in the key feeder schools to Monash. The traditional key feeder schools to Monash have been located in the eastern suburbs. However, there has been a noticeable shift to the outer eastern suburbs, with PLC and Glen Waverley Secondary College now significant providers to Monash. Significantly, Berwick has the most children two years away from high school of any area in Melbourne.

Monash has been successful in attracting a greater proportion of the top 5% of domestic applicants, with the 2006 data indicating that Monash has achieved its 2008 goal of attracting excess of 30% of the Top 5% of VTAC applicants.

**Figure 8 – Monash enrolments by ENTER 2002-2006**

ENTER	Year					Change from 2005	
	2002	2003	2004	2005	2006	Enrolled	%
Under 70.00	146	103	43	50	52	2	4%
70.00 to 74.99	197	227	250	208	203	-5	-2%
75.00 to 79.99	428	383	424	359	396	37	10%
80.00 to 84.99	554	532	581	490	608	118	24%
85.00 to 89.99	660	700	775	679	771	92	14%
90.00 to 94.99	796	813	911	799	883	84	11%
95.00 to 98.99	512	540	608	601	695	94	16%
99.00 to 99.99	127	155	156	167	187	20	12%
<b>TOTAL</b>	<b>3420</b>	<b>3453</b>	<b>3748</b>	<b>3353</b>	<b>3795</b>	<b>442</b>	<b>13%</b>

There is increasing competition in the domestic market as a result of the reduced pool of VTAC applicants, with growing importance on attracting non-school leaver applicants. More high achieving students are moving interstate to pursue studies in higher education, with students attracted to specialized or boutique courses. These changes have highlighted that interstate markets and New Zealand are important student sources for Monash.

## **SWOT Analysis**

***Summary: Strong market position and brand, challenging environment, realisable potential.***

Through analysis of contemporary market research, discussions with key stakeholders and other data, the following strengths, weaknesses, opportunities and threats were considered in shaping this plan.

### **Strengths**

- A member of the Group of Eight, and a well known and recognised brand in many markets in Australia and internationally
- Multi-campus presence
- Established international presence
- Size and breadth of alumni network
- Wide range of course offerings
- Quality of academic staff
- Industry and international linkages

### **Weaknesses**

- Ineffective utilisation of Web as an external communication tool
- Lack of efficiency and confusion in the roles and responsibilities between the centre and faculties in terms of marketing and recruitment
- Data collection from domestic enrolment makes forecasting and targeting difficult
- Low rate of conversion of current undergraduate students to postgraduate programs
- Internal communications
- Staff engagement with Monash vision
- Agents incentives are not as generous as those offered by our competitors
- Transparency of HDR, enquiry management and administrative processes

### **Opportunities**

- Improve Monash Web presence to be more useful and attractive for prospective and current students
- Enhance Monash profile in key emerging markets
- Clearly differentiate Monash in the market, particularly in terms of quality vocational and double degree undergraduate programs
- Increase non-school leavers applying from TAFE or other universities to transfer
- Changing product offerings to respond to market demand
- Leverage size and breadth of Monash to offer unique research opportunities to students including pathways from postgraduate coursework to research

### **Threats**

- Melbourne Model, in terms of postgraduate education and research
- Impact of Voluntary Student Unionism legislation on the student experience and student retention
- Physical and financial capacity to provide world-class resources to HDR students
- Environmental factors, such as:
  - exchange rate fluctuations
  - comparative course fees
  - increased competition – such as UNSW Asia, Carnegie Mellon, local universities and TAFE
  - changing employment markets

- changes to permanent residency regulations
- global threats such as SARS, terrorism, wars, natural disasters
- changing demographics in the local market
- Perception of Monash pathway programs impacting on Monash positioning
- Quality of the student experience
- Negative outcomes from quality reviews

## The Challenge

### ***Summary: Collaborative processes, effective working partnerships, strategic resourcing***

The higher education student market is evolving rapidly, both nationally and internationally. In order to position Monash to continue to attract quality students to all programs and in a forecast declining international student market, it is necessary to regularly review the operational structure and resources that are allocated to marketing and student recruitment.

### **Coordinated marketing effort**

Critical to the Division's operations are the inter-dependencies between:

- Onshore and offshore student recruitment
- Student recruitment and international admissions
- Marketing and student recruitment
- Marketing and international admissions
- Monash Abroad and Marketing/Student Recruitment/International Admissions, and
- Central, faculties, campuses, pathway programs marketing and student recruitment.

It is important that central marketing and recruitment areas, faculties, campuses and pathway programs continue to leverage off each other's work and take joint responsibility for both action and outcomes. Significant work has already been undertaken to integrate these operational areas to deliver improved outcomes.

The Division seeks to improve its governance of activities and analysis of the return on the University's investment. In May 2006 the Division initiated the *One Monash* conference, bringing together marketing and student recruitment staff from each campus and faculty to establish a clear understanding of common goals and a clear path forward for marketing and student recruitment in the University.

The Division has established a Client Relationship Manager position to improve consultation and collaboration.

A new committee is being established to review market strategies and results, to improve governance and accountability within the University's formal reporting structure. This committee will provide a forum for appropriate staff to engage on marketing and student recruitment issues.

If resources are available, the Division will also explore possibilities for staff exchange programs with faculties and campuses, to enhance understanding and collaboration. In the longer term, the Division will also explore opportunities to embed central staff in faculties and campuses to improve communication and collaboration.

### **Critical internal and external partnerships**

The Marketing and Student Recruitment Division is highly dependant on a number of key partnerships and as part of the 2007-10 plans will place a strong priority on enhancing and expanding these partnerships to help achieve the University's goals.

The Division acknowledges that Faculties significantly value-add through specific analysis of enrolment trends, research capacity, education innovation and product development.

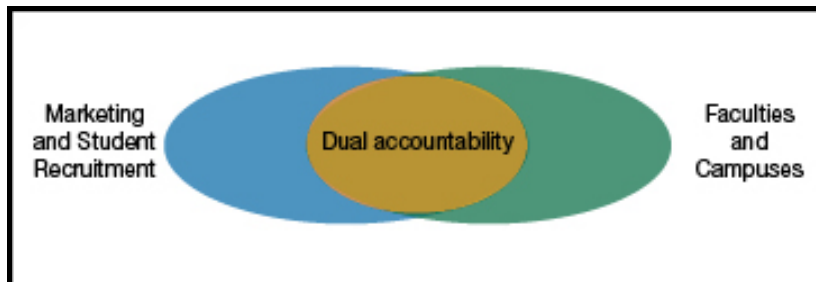
This will include partnerships with:

- other areas within the Advancement Portfolio

- international education agents
- the media
- schools (careers coordinators, discipline teachers and principals)
- corporate partners
- Student Services, including the VTAC admissions area, and
- faculty and campus marketing, student recruitment, admissions and enrolment staff

The relationship between faculties, campuses and central marketing and student recruitment is demonstrated in Figure 9. There are specific responsibilities and activities with a shared overlap for collaboration.

**Figure 9**



## Effective and appropriate resources

The Marketing and Student Recruitment Plan 2007-10 is predicated on having access to appropriate resources, including financial and HR, in order to deliver the required outcomes to the University.

Availability of timely and accurate data to support the plan is an important constituent to achieving the plan's objectives. Undertaking detailed analysis of the domestic market, particularly in fee-paying and postgraduate areas, has proven difficult with limited central control over that process and difficulties in accessing the required data.

The cost of international student recruitment has remained under 5% of revenue from international students for the past 5 years. There is no expectation that this cost-to-revenue ratio will increase throughout the duration of this plan.

## Divisional objectives

### ***Summary: Diversified strategic marketing, targeted campaigns, enhanced processes***

The Division has five clear objectives that it must fulfil in order to support the University's mission.

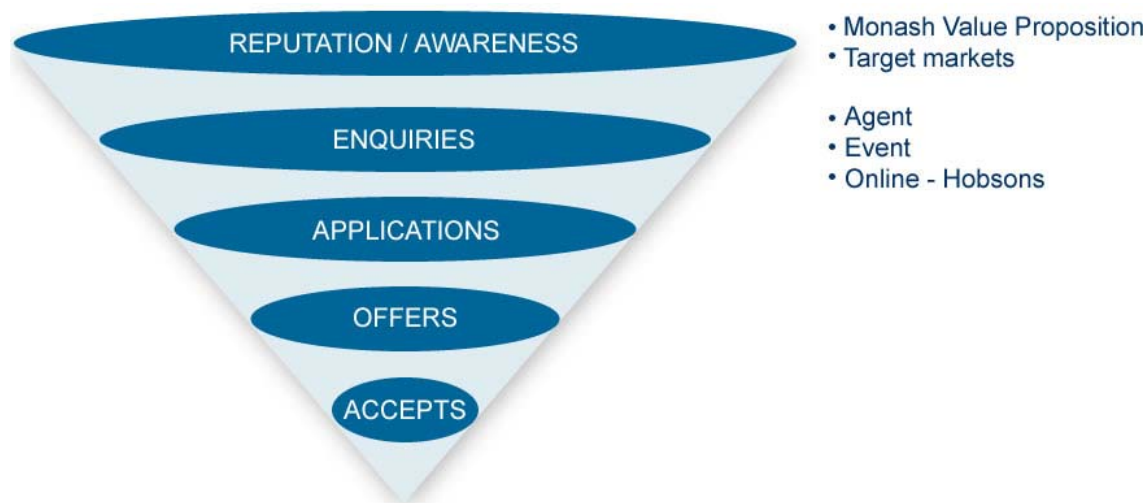
1. **Increase and secure student revenue**
2. **Attract and increase the number of quality students enrolling in Monash University programs and its pathways**
3. **Increase the University's research, international and academic profile to support strategic objectives**
4. **Enhancement of the Monash University profile to improve engagement with key stakeholders, internally and externally**
5. **Ensure high quality outcomes through effective governance and measurement of marketing and student recruitment activities**

## Strategic marketing and student recruitment activities

A successful approach to the student recruitment process is dependent upon establishing a clear value proposition around the University's reputation. The pool of enquiries from events and other recruitment channels will flow from this positioning and awareness of Monash.

The Division's ongoing ambition is to attract quality applications through strategic marketing and student recruitment. It would be inefficient to simply aim to increase the volume of applications irrespective of their likelihood of conversion. Applicants to Monash will be provided with transparent entrance requirements and clear procedures. Improvements to assessment and admissions processes will pull applicants through the process, as will the development of in-house call centre operations and capacity. This process is represented below in Figure 10.

**Figure 10**

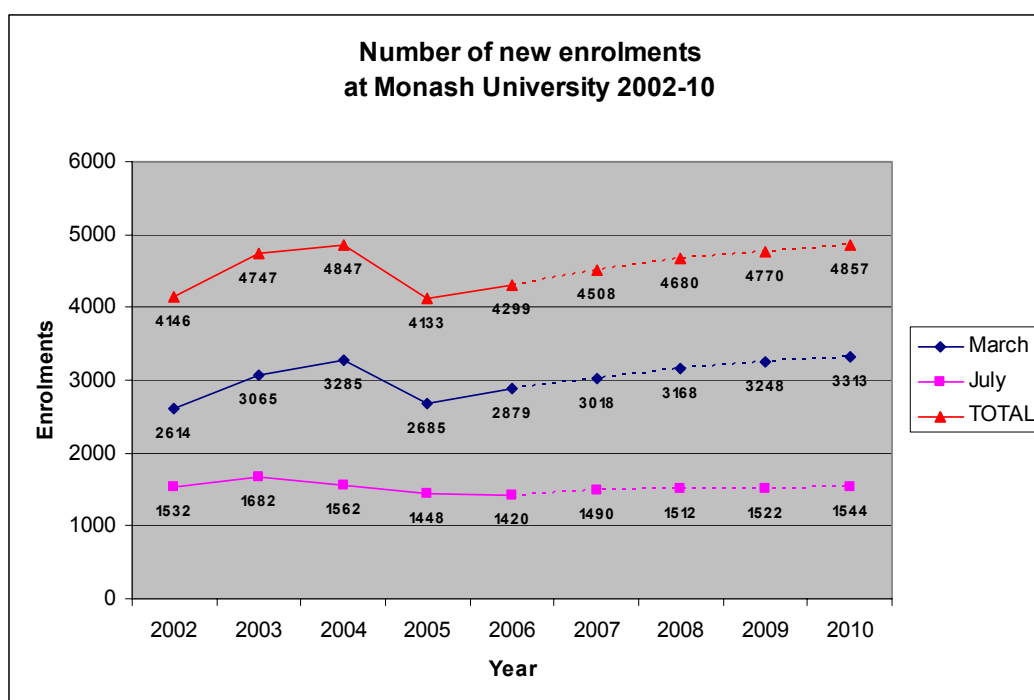


### International recruitment projections 2007-2010

Monash University is the sector leader in recruiting international students. This *Plan and Action Plan* (in Appendix 1) has been put together to provide a platform to articulate the approach to enable Monash to defend this position in an increasingly competitive market.

The figure below provides an overview of Monash's international student enrolments from 2002-06 and enrolment projections for 2007-10. Application and offer rates for Semester 1, 2007 are presently tracking well. However this plan is predicated on Monash recording growth of 5% in international student enrolments in 2007, and slow growth until 2010.

**Figure 11**



Appendix 2 provides detailed projections from 2007-10 for the top 10 markets from which the Division anticipates the majority of international enrolments will originate.

Integrated marketing and student recruitment strategies will be developed for the top 10 source markets to Monash University – China, Malaysia, Singapore, Hong Kong, Indonesia, India, Thailand, Vietnam, USA and South Korea. These strategies will reflect the values and aims embodied in the *International Plan*.

The Division has also reassessed its onshore student recruitment resources to enhance engagement with international students. This is in response to the significant proportion of international students who apply and eventually enrol to study at Monash while located in Australia.

## **Onshore opportunities from positive differentiation**

The introduction of the *Melbourne Model* represents both a challenge and an opportunity for Monash. Given that most leading Victorian students choose between Melbourne and Monash, and Melbourne has gained considerable attention by introducing their system, there is a need for Monash to continue to clearly articulate its position in the domestic (onshore) market.

In addition, there are indications of increased mobility among the top 5% of students, particularly to niche or specialised courses. This raises the possibility that Monash could attract greater numbers of interstate students to a number of key disciplines with an effective marketing and student recruitment effort.

## **Marketing to a wider range of stakeholders**

There is a strong need for strategic communications and promotion to a range of stakeholders beyond the purview of student recruitment in order to support the goals of the University: for example to potential employers, to research partners in industry and government; to government and philanthropic funding bodies; to government regulators, and to the media. Each of these groups will be targeted through a strategic marketing plan that draws together the holistic aims of the university and the specific actions involved to market to targeted groups.

## **Postgraduate and HDR focus**

Monash positions itself as a prestigious, research intensive, international university. The unique aspect of this position in an Australian context is the combination of being research intensive as well as truly international in operations.

In order to cement this position it is crucial that Monash attracts a large number of highly-qualified postgraduate students from both domestic and international markets. In particular, prospective research students should identify that Monash provides the academic rigour and infrastructure to deliver postgraduate education of superior quality.

In response to this, the Division has established a new unit focused entirely on postgraduate and HDR recruitment. A detailed plan has been developed for this key strategic area.

## **Enhanced International Admissions processes**

The International Admissions unit plays a fundamental role in the successful recruitment of international students to Monash, and is an integral part of the Marketing and Student Recruitment Division. The unit needs to work seamlessly with student recruitment to pull applicants through the admissions process.

International Admissions delivers comprehensive and tailored admissions services to students, agents, and faculty and campus stakeholders. A key performance criterion for this unit is the optimisation of turnaround times to support the applicants through the process, in response to competitive market conditions.

# **Governance**

### ***Summary: Diverse source data and research, ongoing review, cost-effectiveness***

The Division's *Action Plan* and *Paper* draws from a wide range of data and other forms of evidence, including commissioned market research; data from IDP, AEI, ABS, DIMA, DEST and VTAC. To complement the Division's research base, an analyst position has been created in order to provide improved forecasting and analysis of market trends.

In order to ensure the Marketing and Student Recruitment Plan 2007-10 is effectively implemented, the Division has a number of methods of self-review: ranging from regular work in progress meetings to annual evaluation of activities. A committee is being established, drawing on membership from across the University, to receive updates on progress in achieving planned outcomes.

The Division will also work with faculties and campuses to identify, set and deliver agreed outcome targets.

The ratio of marketing and student recruitment activities to international student income is 4.9%. The Division is developing a model that will identify the cost to revenue ratio of recruitment from specific markets to allow the University to make better informed decisions of the cost of diversity in student recruitment.

# Appendix 1: Marketing and Student Recruitment Action Plan 2007-2010

## Supporting notes:

- Whilst this is a four year plan (2007-2010), greater emphasis has been given to actions in 2007, due to the need to be responsive to market dynamics. This plan will be reviewed and refocussed on an annual basis.
- The marketing and student recruitment operations of the University are structured so as to combine onshore and offshore activities aimed at International and Domestic students in an integrated manner. This plan reflects that market responsive structure.
- This plan should be read in association with the supplementary background paper. Further detail is contained in the individual University Marketing, Student Recruitment, Postgraduate and HDR Recruitment, Monash Abroad, International Admissions and Advancement portfolio plans. Individual Faculty and Campus Marketing and Recruitment Plans are not contained within this document.
- Whilst some strategies are listed under particular objectives, the interrelationship between our goals means that they may contribute to many objectives.

## Objective 1: Increase and secure student revenue

Strategies	Actions	Targets / KPIs	Responsibility
Maintain and defend traditional source markets of international student recruitment	<ul style="list-style-type: none"> <li>- Continue to undertake extensive market research into international student decision making process and buying cycle</li> <li>- Analysis of traditional source markets in terms of courses selected, competitors, environmental factors</li> <li>- Strengthen and enhance key agent channels through continued support and collaboration to achieve mutually agreed outcomes</li> <li>- Identify and support establishment of new pathways to Monash from traditional international student source markets (eg. 2 plus 2, twinning and collaborative partnerships)</li> </ul>	<p>Research commissioned by January 2007</p> <p>Two reports per year following completion of intake census</p> <p>Agent engagement strategy reviewed annually</p> <p>Increased number of appropriate pathway relationships in traditional markets</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Intl Admissions</li> <li>- Student Recruitment</li> <li>- Student Recruitment</li> <li>- Student Recruitment</li> <li>- Faculties</li> </ul>
Grow new and emerging markets with particular focus on segmenting in terms of Monash College, UG, GPG	<ul style="list-style-type: none"> <li>- Report on new markets annually and further segment those markets in terms of GPG, HDR, UG and Monash College</li> </ul>	<p>Report in November and incorporate into the recruitment strategy for the next year</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Postgraduate</li> </ul>

Strategies	Actions	Targets / KPIs	Responsibility
and HDR	<ul style="list-style-type: none"> <li>- Work with faculties to identify cohorts of students, in particular GPG, in domestic and international markets and develop appropriate recruitment plans for each cohort</li> <li>- Support the development of strategies to capitalise on the outcomes of the current Review of Coursework Programs</li> <li>- Identify strategies for recruiting into each level of study within new markets</li> <li>- Set targets for each level of study within key new and emerging markets over a four year cycle</li> <li>- Targets by faculty and campus established collaboratively</li> <li>- Provide marketing and student recruitment support to Monash College Group in extending Monash College's international presence in emerging markets</li> </ul>	<p>Cohort recruitment strategies developed by June 2007</p> <p>Marketing and communication strategies developed by March 2007</p> <p>Improve recruitment outcomes to deliver specified targets</p> <p>Targets achieved and adjustments made annually to four-year projections</p> <p>Targets are set by December for upcoming year</p> <p>Marketing and student recruitment plans developed for each new MC operation</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Postgraduate</li> <li>- Faculties</li> <li>- Marketing</li> <li>- Faculties</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Postgraduate</li> <li>- Student Recruitment</li> <li>- Faculties</li> <li>- Student Recruitment</li> <li>- Faculties</li> <li>- Campuses</li> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Monash College Group</li> </ul>
Grow or maintain domestic and international student revenue in line with University requirements	<ul style="list-style-type: none"> <li>- Integrate market research and undertake annual price elasticity analysis</li> <li>- Develop a model that provides a mechanism to enable market factors to be taken into account when setting fees</li> <li>- Promote pathways to prospective and current students from Monash College to HDR</li> </ul>	<p>Deliver market analysis</p> <p>Implement pricing model by March 2007</p> <p>Grow income per student by 5%</p>	<ul style="list-style-type: none"> <li>- MSR Division</li> <li>- FIRM</li> <li>- MSR Division</li> <li>- FIRM</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Intl</li> </ul>

Strategies	Actions	Targets / KPIs	Responsibility
	<ul style="list-style-type: none"> <li>- Analyse domestic market to ascertain locations of specific demand and predict changes in suburbs and key feeder schools, building on research that has already been undertaken</li> </ul>	Incorporate existing corporate knowledge of market and market segments into action plans resulting in increased domestic full fee paying students	Admissions <ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Faculties</li> </ul>
Protect international student revenue from potential global impacts (eg. fluctuating dollar; SARS)	<ul style="list-style-type: none"> <li>- Implement marketing and student recruitment strategy in new and emerging markets</li> </ul>	Strategy developed and implemented by June 2007	<ul style="list-style-type: none"> <li>- Student Recruitment</li> </ul>
Build onshore full fee paying places	<ul style="list-style-type: none"> <li>- Undertake market research to improve understand of the domestic fee paying market and propensity to study at Monash University</li> <li>- Enhance existing strategy for recruiting domestic full fee paying students to Monash</li> </ul>	Research commissioned by January 2007  Increase the number of domestic full fee paying students by 10% each year	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Marketing</li> </ul>

**Objective 2: Attract and increase the number of quality students enrolling in Monash University programs and its pathways**

Strategies	Actions	Targets / KPIs	Responsibility
Define and target quality students to be recruited to the university	<ul style="list-style-type: none"> <li>- Identify and engage quality students by key feeder schools</li> <li>- Collaborate with faculties and departments to devise strategies to encourage talented students to continue on to further studies within the University</li> <li>- Target high achieving students in the university; schools, TAFEs and through other providers and then develop plans for engaging with them</li> <li>- A plan for engagement with alumni to promote postgraduate studies and encourage their children to attend Monash for undergraduate studies</li> </ul>	<p>School engagement model continually reviewed and refined</p> <p>5% increase in the number of Monash students continuing from Undergraduate to Postgraduate studies</p> <p>Plans are developed and implemented by end of 2007</p> <p>Plan to be completed by July 2007. This plan will have an onshore and offshore component.</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Faculties</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Postgraduate</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Alumni</li> </ul>
Improve conversions in all segments of the application process	<ul style="list-style-type: none"> <li>- Enhance call centre operations within international admissions to have the capacity to service all prospective students, both domestic and international</li> <li>- Conversions for all stages of the international application process are defined, benchmarked and then improved in line with benchmarking. Conversion ratios to be established for; Enquiry to Application; Application to Offer; Offer to Acceptance; Enquiry to Acceptance; Acceptance to Enrolment</li> <li>- Streamline internal application processes to ensure better outcomes in terms of application to offer and offer to acceptance outcomes</li> </ul>	<p>Integrated CRM system implemented by June 2007</p> <p>Conversions are better than our competitors by 2008 in each of these areas</p> <p>Competitive turn around times delivered inline with market demand</p>	<ul style="list-style-type: none"> <li>- Intl Admissions</li> <li>- Student Recruitment</li> <li>- Student Recruitment</li> <li>- Intl Admissions</li> <li>- Intl Admissions</li> </ul>

Strategies	Actions	Targets / KPIs	Responsibility
	<ul style="list-style-type: none"> <li>- Conversions for students undertaking the Enhancement Studies program as part of their year 12 studies are improved through a program of increased engagement</li> <li>- Increase the proportion of Monash University undergraduate students continuing on to further studies at the university</li> <li>- Improve participation of current Monash students in the Monash Abroad program</li> </ul>	<p>Student progression from Enhancement studies to a Monash University degree program increases to 60% by 2008 (currently 46% based on 2005 VTAC destination data)</p> <p>Increase by 5% annually</p> <p>Increase participation in line with Monash Mobility framework</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Postgraduate</li> <li>- Faculties</li> <li>- Monash Abroad</li> <li>- Student Recruitment</li> </ul>
Attract the best domestic students irrespective of means and circumstances	<ul style="list-style-type: none"> <li>- Actively promote scholarships and the range of programs offered by Monash at school events, through targeted activities to parents and career advisers</li> <li>- Actively promote the Access Monash program in regional areas, at TAFE institutes, to disadvantaged schools or to appropriate individuals</li> <li>- Ensure that Monash is promoted as a university of choice in all prospective student publications and on the Web</li> <li>- Proactively attract Indigenous student applications</li> </ul>	<p>Increase scholarship applications from these groups</p> <p>Increase applications for the Access Monash program</p> <p>Ensure all recruitment publications and the Web promote Monash as a first choice for prospective students</p> <p>Increasing number of applications from Indigenous students through Access Monash scheme</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- CAIS</li> </ul>
Attract a greater proportion of students into undergraduate	<ul style="list-style-type: none"> <li>- Establish and implement strategies to effectively market and convert the top 5 % of VTAC applicants</li> </ul>	30% of the top 5% of VTAC applicants by 2008	<ul style="list-style-type: none"> <li>- Student Recruitment</li> </ul>

Strategies	Actions	Targets / KPIs	Responsibility
programs from the top 5% of onshore school leavers	<ul style="list-style-type: none"> <li>- Enhance the range of collateral and events to improve communication and marketing to teachers and principals</li> <li>- Work with principals and teachers of key feeder schools to promote particular course offerings</li> <li>- Increase profile of the Enhancement Studies program</li> </ul>	<p>Communications plan implemented by January 2007</p> <p>Schools identified and action plan developed for each school</p> <p>Numbers enrolled in Enhancement Studies to grow by 10%</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Student Recruitment</li> <li>- Marketing</li> </ul>
Increase domestic and international HDR load	<ul style="list-style-type: none"> <li>- Develop plans in consultation with each faculty in order to market and establish targets for HDR recruitment</li> <li>- Provide templates and training for those involved in the HDR recruitment process</li> <li>- In conjunction with MRGS improve communication about the application process for HDR students</li> <li>- Review process from enquiry to application to enrolment and identify inefficiencies and barriers</li> </ul>	<p>Plans to be devised and implemented by March 2007</p> <p>Templates developed by January 2007</p> <p>Communicated by March 2007</p> <p>Recommendations for refining processes made by March 2007</p>	<ul style="list-style-type: none"> <li>- Postgraduate</li> <li>- Postgraduate</li> <li>- Postgraduate</li> <li>- MRGS</li> <li>- Postgraduate</li> <li>- MRGS</li> <li>- Intl Admissions</li> </ul>
Improve the effectiveness of the Web as a primary marketing tool to key target markets	<ul style="list-style-type: none"> <li>- Benchmark to ensure our Web presence surpasses our competitors in servicing prospective students</li> <li>- Enhance Monash's Web presence to ensure it is an effective and efficient marketing and student recruitment tool</li> </ul>	<p>Benchmarking completed by March 2007</p> <p>Ongoing</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Marketing</li> </ul>

**Objective 3: Increase the University's research, international and academic profile to support strategic objectives**

<b>Strategies</b>	<b>Actions</b>	<b>Targets / KPIs</b>	<b>Responsibility</b>
Increase the HDR profile	<ul style="list-style-type: none"> <li>- Deliver new methods of attracting HDR students, including targeted media coverage, dedicated Websites, and marketing collateral</li> <li>- Deliver events including public lectures and information events to attract new HDR students</li> </ul>	<p>Increase strategic media presence of researchers achievements aiming at potential HDR students</p> <p>New event program to be in place by March 2007 and publicly available on the Web</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Postgraduate</li> <li>- Faculties</li> <li>- Marketing</li> <li>- Postgraduate</li> <li>- Faculties</li> </ul>
Market the University to funding organisations and partners	<ul style="list-style-type: none"> <li>- Increase media and direct marketing targeting key stakeholders</li> <li>- Introduction of distribution database to better target marketing collateral and direct marketing</li> </ul>	<p>Improved outcomes in key media</p> <p>Optimisation of marketing database to be completed by June 2007 and updated on ongoing basis</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Faculties</li> <li>- Marketing</li> </ul>
Enhance the engagement of Monash with industry, government, and the community	<ul style="list-style-type: none"> <li>- Implement strategies for communication to facilitate industry engagement</li> </ul>	<p>Increase awareness of Monash and its strengths to target organisations and audiences, as defined by market research</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Faculties</li> </ul>
Establishment of international media and communications plan	<ul style="list-style-type: none"> <li>- Match mediums and messages to key countries</li> <li>- Assess allocation of spend across key media</li> </ul>	<p>Finalised plan by June 2007</p>	<ul style="list-style-type: none"> <li>- Marketing</li> </ul>
Analyse and improve communication with current students	<ul style="list-style-type: none"> <li>- Promote lifelong engagement with current students</li> </ul>	<p>Establishment of strategies by June 2007</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Alumni</li> <li>- Postgraduate</li> </ul>
Promote international student mobility	<ul style="list-style-type: none"> <li>- Implement the Monash Mobility communication strategy</li> <li>- Implement KPIs and monitoring system for student mobility</li> </ul>	<p>Strategy to be implemented by July 2007</p> <p>KPIs and monitoring system</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Monash Abroad</li> <li>- Marketing</li> <li>- Student</li> </ul>

Strategies	Actions	Targets / KPIs	Responsibility
	<ul style="list-style-type: none"> <li>- Promote intercampus study options for current Monash students on all campuses</li> </ul>	<p>to be implemented by 2007</p> <p>Study abroad numbers to rise ongoing</p>	<p>Recruitment</p> <ul style="list-style-type: none"> <li>- Monash</li> <li>- Abroad</li> </ul>

**Objective 4: Enhancement of the Monash University profile to improve engagement with key stakeholders, internally and externally**

Strategies	Actions	Targets / KPIs	Responsibility
Improve the awareness of the Monash brand domestically and internationally	<ul style="list-style-type: none"> <li>- Promote Monash's vision and achievements both externally and internally</li> </ul>	Marketing Plan completed annually by January 2007	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Faculties</li> </ul>
Achieve cost efficiencies and value for money in all student recruitment and marketing activities	<ul style="list-style-type: none"> <li>- Continue to work in collaboration with faculties to achieve efficiencies in international recruitment</li> <li>- Establish new purchasing procedures for advertising, with particular focus on improving return on investment through collective buying</li> </ul>	<p>Taskforce established by January 2007</p> <p>Procedures established and communicated to Monash community by July 2007</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Marketing</li> </ul>
Improve profile through media coverage both in terms of publications and media	<ul style="list-style-type: none"> <li>- Introduce and implement improved benchmarking system for media coverage</li> <li>- Implement strategic media plan for 2007</li> </ul>	<p>Plan implemented by January 2007 and ongoing</p> <p>Plan developed by December 2006 and assessed against KPIs on a quarterly basis</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Marketing</li> </ul>
Promulgate framework for enhancing student experience and mobility at Monash University	<ul style="list-style-type: none"> <li>- Implement Monash Mobility and Student Experience marketing and communications strategy</li> </ul>	Marketing and communications strategy implemented by January 2007. Actions are ongoing	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Monash Abroad</li> </ul>
Enhance the Web to engage more effectively with key stakeholders, to deliver information and services	<ul style="list-style-type: none"> <li>- Progressively implement new overarching Web strategies</li> <li>- Establish a Web content centre to centrally coordinate and determine university-wide Web responsibilities and governance</li> </ul>	<p>Strategy paper prepared by January 2007 and progressively implemented and reviewed.</p> <p>Centre to be established by January 2007</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- Marketing</li> </ul>
Improve communications with ranking and rating	<ul style="list-style-type: none"> <li>- Strategically communicate with key ranking agencies, including:                             <ul style="list-style-type: none"> <li>o Newsweek</li> <li>o Times Higher Education Supplement</li> </ul> </li> </ul>	Rankings improve	<ul style="list-style-type: none"> <li>- Marketing</li> </ul>

Strategies	Actions	Targets / KPIs	Responsibility
agencies	<ul style="list-style-type: none"> <li>○ Good Universities Guide</li> <li>○ Shanghai Jiao Tong University</li> </ul>		
Assist alumni and fundraising areas in achieving their goals	<ul style="list-style-type: none"> <li>- Support the development of active groups of alumni nationally and internationally, with a focus on synergies with student recruitment activities in major markets</li> <li>- Implement an annual plan for engagement with alumni in China, Hong Kong, Malaysia, Indonesia and Singapore</li> <li>- Deliver a regular and effective suite of communications targeting alumni, including the role of Monash Magazine in targeting a range of stakeholders including alumni, reflecting priorities and new strategies for alumni engagement</li> </ul>	<p>By December 2007 25% of offshore recruitment activity will incorporate alumni engagement, with the proportion increasing by 2010</p> <p>Plan developed by December each year.</p> <p>Develop communication plan June 2007</p>	<ul style="list-style-type: none"> <li>- Student Recruitment</li> <li>- Marketing</li> <li>- Student Recruitment</li> <li>- Alumni</li> <li>- Marketing</li> </ul>
Provide marketing support and activities to aid the fundraising area in meeting its revenue targets	<ul style="list-style-type: none"> <li>- Establish marketing requirements for fundraising activities and provide support to reach agreed goals</li> </ul>	Deliver marketing support plan for fundraising activities and annually review	- Marketing
Deliver excellent communications throughout the University	<ul style="list-style-type: none"> <li>- Establish an internal communications working party to identify need and opportunity to improve communication to current staff and students</li> </ul>	Establishment of working party, to report outcomes to One Monash Conference 2007	- Marketing
50 <sup>th</sup> Anniversary celebration to recognise the achievements of the University	<ul style="list-style-type: none"> <li>- Establish 50<sup>th</sup> Anniversary consultative committee</li> <li>- Develop and execute 50<sup>th</sup> Anniversary plan</li> </ul>	Enhanced profile of the University and recognition of the University's achievements by key stakeholders	- Marketing

**Objective 5: Ensure high quality outcomes through effective governance and measurement of marketing and student recruitment activities**

<b>Strategies</b>	<b>Actions</b>	<b>Targets / KPIs</b>	<b>Responsibility</b>
Ensure clarity as to agreed roles and responsibilities between faculties, campuses and central marketing and recruitment team, with a particular focus on reducing duplication	<ul style="list-style-type: none"> <li>- Working party to review opportunities to enhance collaboration</li> </ul>	Working party to report by December 2007	- MSR Division
Establish a transparent and consultative marketing and student recruitment governance structure	<ul style="list-style-type: none"> <li>- Establish a University-wide marketing and student recruitment committee with formal terms of reference. This committee would report on strategy, implementation and results</li> </ul>	Committee in place by January 2007	- MSR Division
Provide an environment whereby collaboration, expertise, and market analysis are shared across the university	<ul style="list-style-type: none"> <li>- Enhance mechanisms to review market strategies and results involving key internal stakeholders</li> <li>- Create newsletter and Website for use by all staff engaged in marketing and student recruitment functions</li> <li>- Regular "One Monash" Conferences held to engage all Monash staff involved in marketing and recruitment functions</li> </ul>	<p>Formal market review process established by January 2007 and meeting regularly</p> <p>Newsletter and Website established by January 2007 and ongoing, regular communications</p> <p>Conference held annually</p>	<ul style="list-style-type: none"> <li>- Divisional Director</li> <li>- Marketing</li> <li>- Divisional Director</li> </ul>
Ensure One Monash connectivity with the faculties and campuses in terms of recruitment and marketing for mutual benefit	<ul style="list-style-type: none"> <li>- Improve communication between marketing and student recruitment staff on all campuses</li> <li>- Hold annual One Monash conference to share vision for future directions of University marketing and student recruitment and improve networking</li> </ul>	<p>Communication improvement to be surveyed, analysed and optimised at each One Monash conference</p> <p>One Monash Conference held annually</p>	<ul style="list-style-type: none"> <li>- Marketing</li> <li>- MSR Division</li> </ul>

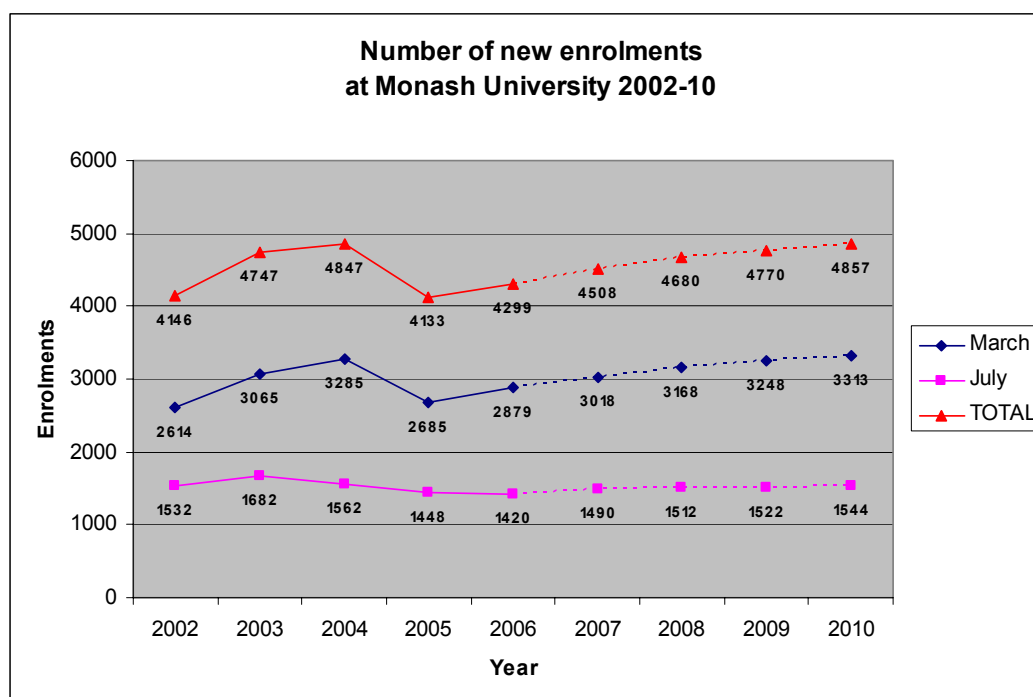
Strategies	Actions	Targets / KPIs	Responsibility
Improve Return on Investment (RoI)	<ul style="list-style-type: none"> <li>- Progressively review areas of expenditure in collaboration with internal stakeholders to identify opportunities for savings and outcomes delivered proportional to funds spent</li> </ul>	January 2007 – initiate annual RoI review of past year's expenditure against outcomes achieved	<ul style="list-style-type: none"> <li>- All areas</li> </ul>

## Appendix 2: International Student Enrolment Projections 2007-10

### Number of New Enrolments 2002 – 2006

### Projection of New Enrolments 2007 -2010

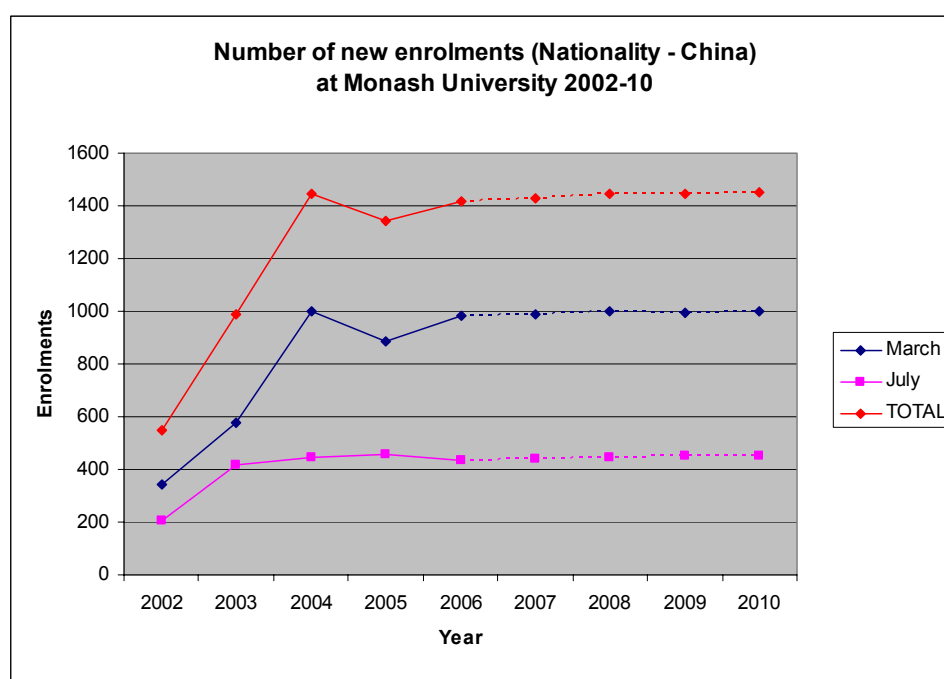
	March	July	TOTAL	% change
2002	2614	1532	4146	
2003	3065	1682	4747	14%
2004	3285	1562	4847	2%
2005	2685	1448	4133	-15%
2006	2879	1420	4299	4%
2007	3018	1490	4508	5%
2008	3168	1512	4680	4%
2009	3248	1522	4770	2%
2010	3313	1544	4857	2%



## CHINA

<b>Student visa assessment level</b>	AL4
<b>Regional Manager/s</b>	Pam Shin, Claudine Ngoh
<b>Key agents</b>	EIC, IDP/EduGlobal, Beijing JIL, IEN, Aceleader, A&A
<b>Levels of interest</b>	MUELC, MC, UG, GPG
<b>Areas of greatest demand</b>	BusEco, IT, Arts, Engineering
<b>Primary competitors</b>	UNSW, University of Melbourne, UK, USA, Singapore
<b>Key recruitment periods</b>	February/March and August/September

### Enrolment projections



### Market analysis

- Current GPG dependence, particularly in BusEco, and under-representation overall of HDR commencements from China
- Significance of pathway options into Monash (ie. Monash College, MUELC and MUFY)
- Increased competition and emergence of new competitors
- China transitioning from nett exporter to nett importer of education
- Changing employment markets for graduates in China
- PR focus and other government regulations (eg. skills in demand)

### Forecast

- Enrolment numbers from China to remain slow, with a shift in program destination in response to changes to entrance requirements for several GPG programs and shift away from Accounting)
- Decline in the number of students opting for pathway options/applying onshore

### Key strategic objectives

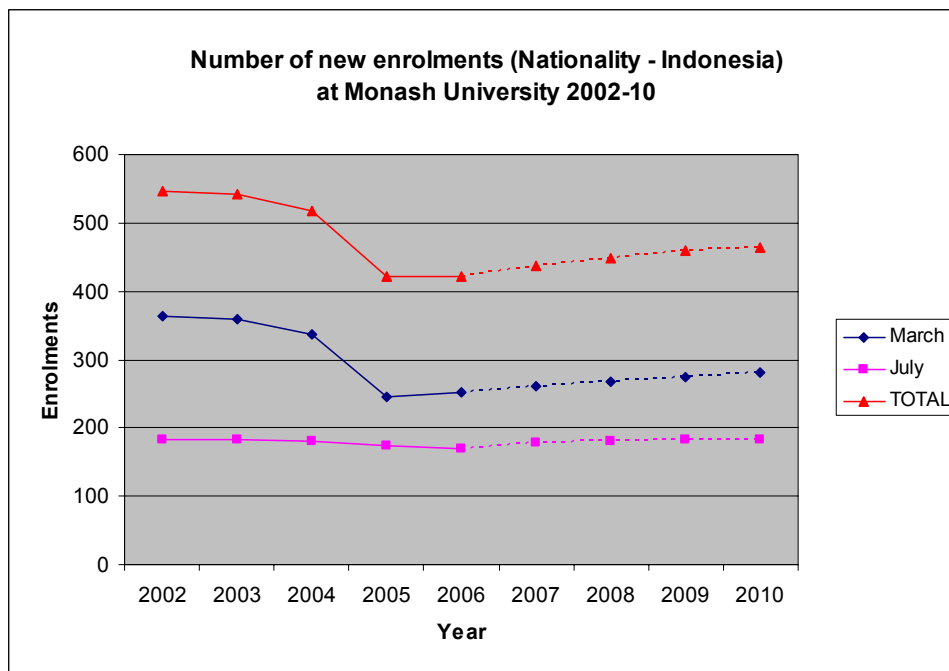
- Increase market share of quality students from competitors
- Diverse discipline areas of enrolment
- Increase HDR enrolments
- Maximize recruitment resources servicing Chinese market

- Broaden regions of engagement and brand presence beyond traditional large city catchments of Beijing, Shanghai and Guangzhou
- Focus online brand profile through geographic and demographic targeting

## INDONESIA

<b>Student visa assessment level</b>	AL2
<b>Regional Manager</b>	Nicholaas So
<b>Key agents</b>	IDP, Edlink, AusEd, Erajasa
<b>Levels of interest</b>	MUELC, MC, UG, GPG
<b>Areas of greatest demand</b>	BusEco, Engineering, IT, Arts
<b>Primary competitors</b>	UNSW, U.Melbourne, RMIT, Macquarie
<b>Key recruitment periods</b>	March, August/September

### Enrolment projections



### Market analysis

- Traditionally a GPG market, with recent emergence of significant pathway market
- Increased competition and emergence of new competitors (demonstrated by significant office presence by Australian providers in Indonesian market)
- Indonesia onshore numbers to Australia have fallen, but Monash's decline has been less significant
- Vast Monash interest in recruitment from Indonesia: Monash Malaysia, Monash Australia, Monash College Jakarta, Monash College Australia and Monash College Singapore

### Forecast

- Increased competition in Indonesia, with growth across sectors to Australia expected to continue

- Steady growth expected for Monash (including Monash Malaysia), foremost in pathway enrolments onshore and through existing partners

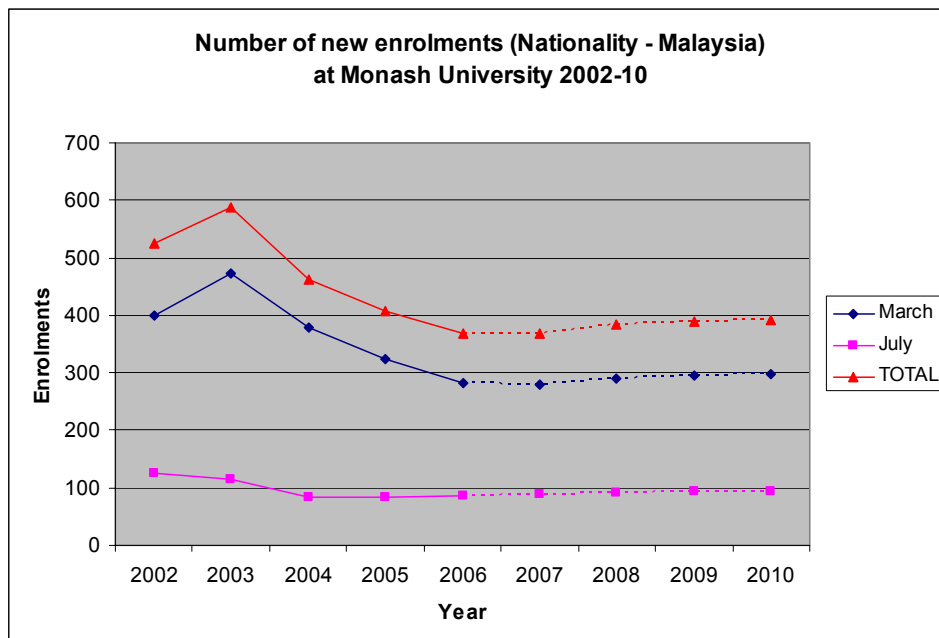
### Key strategic objectives

- Increase market share of quality students from competitors
- Broaden regions of engagement beyond traditional large city catchments
- Optimise recruitment resources servicing Indonesian market
- Clearly define and differentiate the Monash offerings in the marketplace
- Train and engage the agent network by being supportive, responsive and reliable
- Maintain and extend relationships with schools and institutions across Indonesia
- Increase brand profile through strategic media and online presence

## MALAYSIA

<b>Student visa assessment level</b>	AL1
<b>Regional Manager</b>	Claudine Ngoh
<b>Key agents</b>	IDP, AusEd, Studylink, IEC
<b>Levels of interest</b>	MC, UG
<b>Areas of greatest demand</b>	MNHS, BusEco, Engineering, Pharmacy, Science
<b>Primary competitors</b>	U.Melbourne, UNSW, Swinburne, Curtin
<b>Key recruitment periods</b>	March, August/September

### Enrolment projections



### Market analysis

- Australia remains the first choice destination for Malaysian students seeking an international education
- Increased competition and emergence of new competitors in Malaysia, and campus presence of offshore providers in-country (Swinburne, Curtin, Nottingham, De Montfort)

- Australian university (including Monash) enrolments from Malaysia have been steadily declining as a result of increased competition and capacity in the region

### **Forecast**

- Enrolments to Monash from Malaysia to grow slowly, but not expected to return to historical peaks of 2002-03
- Maximise participation in education opportunities from the Malay community, who are an expanding demographic and represent opportunity for long term growth

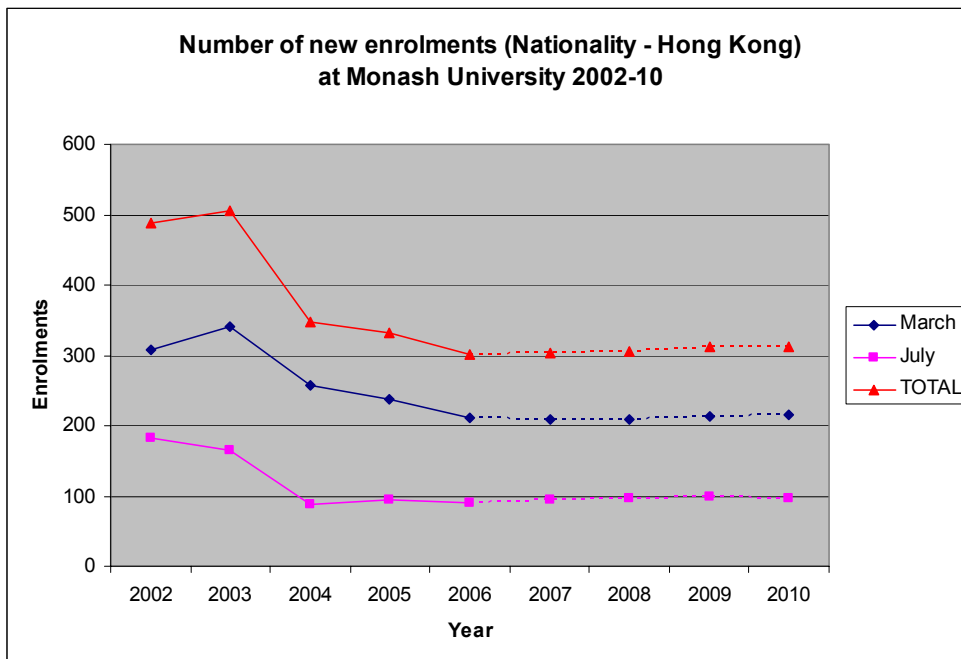
### **Key strategic objectives**

- Increase market share of quality students from competitors
  - Optimise recruitment resources servicing Malaysian market - eg. Monash Malaysia
  - Sustain Monash brand presence and awareness of Monash in Malaysia, for the benefit of all campuses
  - Maintain and extend relationships with schools and institutions across Malaysia
  - Develop more transparent and clearly defined advanced standing and entrance requirements
  - Train and engage the agent network by being supportive, responsive and reliable
  - Continue to profile pathway options to Monash, as well as defining clear processes for transferring students from Monash Malaysia
  - Improve brand profile through increased strategic media presence and allied marketing activity in collaboration with Monash Malaysia
-

## HONG KONG

<b>Student visa assessment level</b>	AL1
<b>Regional Manager</b>	Genie Lim
<b>Key agents</b>	IDP, AEC, ACE, AusEd, ISSC
<b>Levels of interest</b>	MC, UG
<b>Areas of greatest demand</b>	BusEco, Arts, Art & Design, Engineering, MNHS
<b>Primary competitors</b>	UK, UNSW, U.Melbourne, U.Sydney, RMIT
<b>Key recruitment periods</b>	March, July/August

### Enrolment projections



### Market analysis

- Hong Kong education system undergoing significant reform:
  - Move from 7 to 6-year secondary education model, creating a double-cohort in 2012
  - Move from 3-year degrees to 4-year degrees (from 2012)
- Decline in students studying onshore in Australia over past 4-5 years, with Australian universities offering in conjunction with local institutions top up and sandwich programs from foundation year, diplomas, associate and UG degrees
- Demand for collaborative programs between local and overseas education providers continues (In March 2005, 290 post-secondary and tertiary courses offered in Hong Kong by Australian institutions)

### Forecast

- Potential drop in demand for pathways to higher education in Australia, with the introduction of the 6-year Diploma of secondary education
- Growth in demand for higher education in Australia expected when HK students matriculate, with no increase in university places in Hong Kong

### Key strategic objectives

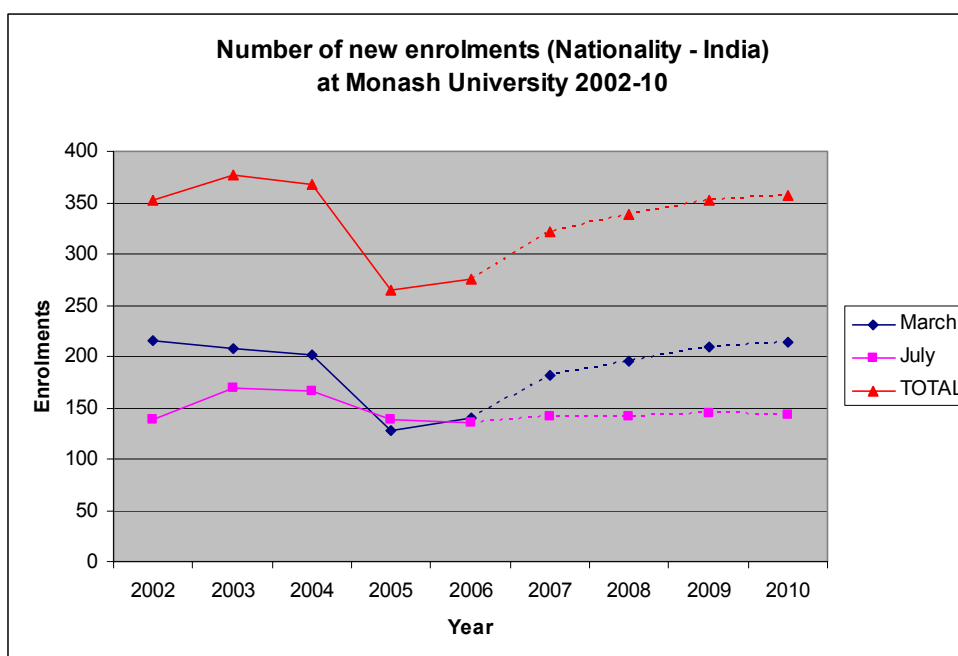
- Sustain Monash brand presence and awareness in Hong Kong market

- Train and engage the agent network by being supportive, responsive and reliable
- Continue to profile pathway options to Monash
- Develop more transparent and clearly defined advanced standing and entrance requirements
- Maintain and extend relationships and links with schools and institutions in Hong Kong
- Improve Monash brand profile through increased media exposure and allied marketing initiatives
- Continued brand presence through strategic advertising – continuing success generated through transit and online advertising campaigns

## INDIA

<b>Student visa assessment level</b>	AL3
<b>Regional Manager/s</b>	Alphonsa Pakiam
<b>Key agents</b>	IDP, Planet, Kaaiser, SIEC, Chopras, Global Reach
<b>Levels of interest</b>	GPG
<b>Areas of greatest demand</b>	BusEco, Engineering, IT, Arts
<b>Primary competitors</b>	Go8, RMIT, Macquarie, UK, USA
<b>Key recruitment periods</b>	February/March, August/September

### Enrolment projections



### Market analysis

- Australian university enrolments from India have been rapidly increasing in recent years, with Monash's enrolment numbers fluctuating greatly (with substantial IT decline in 2005 impacting on overall enrolment numbers)
- Permanent residence remains a significant demand driver (linked to Migration Occupations in Demand List)

- Indian students continue to have ready access to educational loans to fund overseas education
- Ongoing reliance on agent network to recruit students, with more than 80% of students applying to study in Australia through an agent (for counselling and student visa support)

### **Forecast**

- Stable growth expected in enrolments for Monash, with expectation of some increase in non-traditional areas of undergraduate and HDR

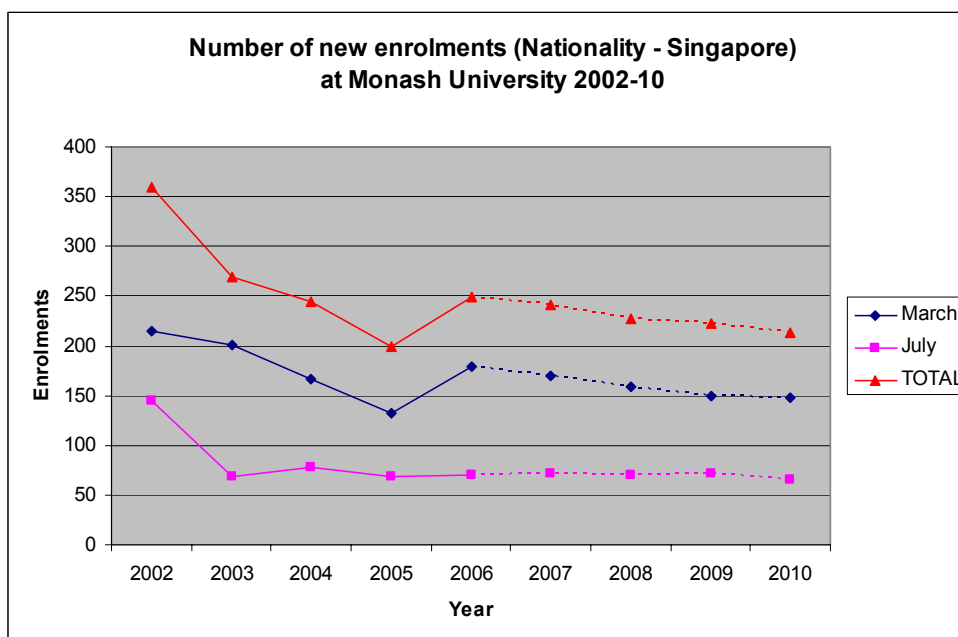
### **Key strategic objectives**

- Broaden Monash profile presence and awareness through high level engagement with industry, education and government, and leveraging the relationship between Monash IIT Mumbai
  - Enhance agent management and relationships, with focus on improved conversion of offers to enrolments via enhanced efficiencies within the admissions process
  - Undertake promotional activity focusing on specific niche programs to broaden and build up profile beyond traditional discipline areas of business and IT
  - Maintain and extend relationships and links with schools and institutions, in order to develop sustainable undergraduate market
  - Coordinate Alumni and develop as a referral vehicle in recruitment activities
  - Improved media presence
-

## SINGAPORE

<b>Student visa assessment level</b>	AL1
<b>Regional Manager</b>	Genie Lim
<b>Key agents</b>	IDP, OAL, CMS, Hui & Kuah
<b>Levels of interest</b>	MC, UG, GPG
<b>Areas of greatest demand</b>	BusEco, Arts, Medicine & Health Sciences
<b>Primary competitors</b>	UNSW, U.Melbourne, U.Sydney, UQ, UWA, NUS
<b>Key recruitment periods</b>	January/February, July/August

### Enrolment projections



### Market analysis

- Singapore continues to be an undergraduate market, with some pathways demand
- Enrolment numbers to Monash have been in decline since 2002
- Singapore continues to increase capacity as an education destination, with an increase in student places at local polytechnics and universities, and resulting in more Singaporeans opting to study at home

### Forecast

- Decline in demand for higher education options in Australia to continue, with the UNSW Asia campus commencing program delivery in 2007 and development of additional education delivery capacity in Singapore

### Key strategic objectives

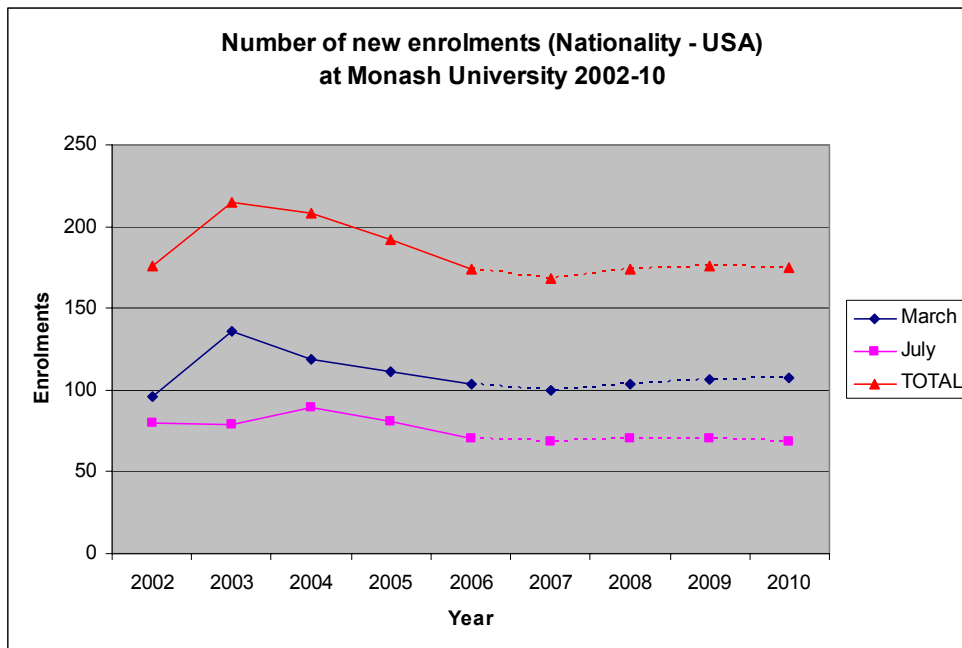
- Defend market share of quality students in an increasingly competitive market
- Sustain Monash brand presence and emphasis on quality of education at Monash in Singaporean market
- Develop more transparent and clearly defined advanced standing and entrance requirements
- Enhance agent management and relationships, with focus on improved conversion of offers to enrolments via enhanced efficiencies within the admissions process

- Maintain and extend relationships and links with targeted feeder schools and institutions in Singapore
- Engage Singapore Association of Monash (SAM) members in recruitment activities, and enhance relationship and activities with Monash University Alumni Association Singapore (MUAAS)

## USA

<b>Student visa assessment level</b>	AL1
<b>Regional Manager</b>	Lindsay Spedding
<b>Key partners/agents</b>	Loyola, Australearn, Butler, Arcadia
<b>Levels of interest</b>	Study Abroad, GPG
<b>Areas of greatest demand</b>	Arts, Science, BusEco, Art & Design
<b>Primary competitors</b>	Macquarie, U.Melbourne, UNSW
<b>Key recruitment periods</b>	September/October

## Enrolment projections



## Market analysis

- Most students studying at Monash from the US are involved in 1-semester study abroad or exchange programs, although Monash captures small portion of total market share of US study abroad market (ranked 23<sup>rd</sup> in 2005 amongst Australian universities)
- Study abroad numbers from the US to Australia have decreased from 2004-2005, with increased competition from destinations in Europe and Latin America
- Continued questions posed about the quality of Australian education options amongst US academics
- Full degree numbers to Australia, and Monash, are small
- Limited agent channels for the recruitment of full degree students

## Forecast

- Small growth expected in study abroad enrolments to Monash, with no growth expectation in full-degree enrolments

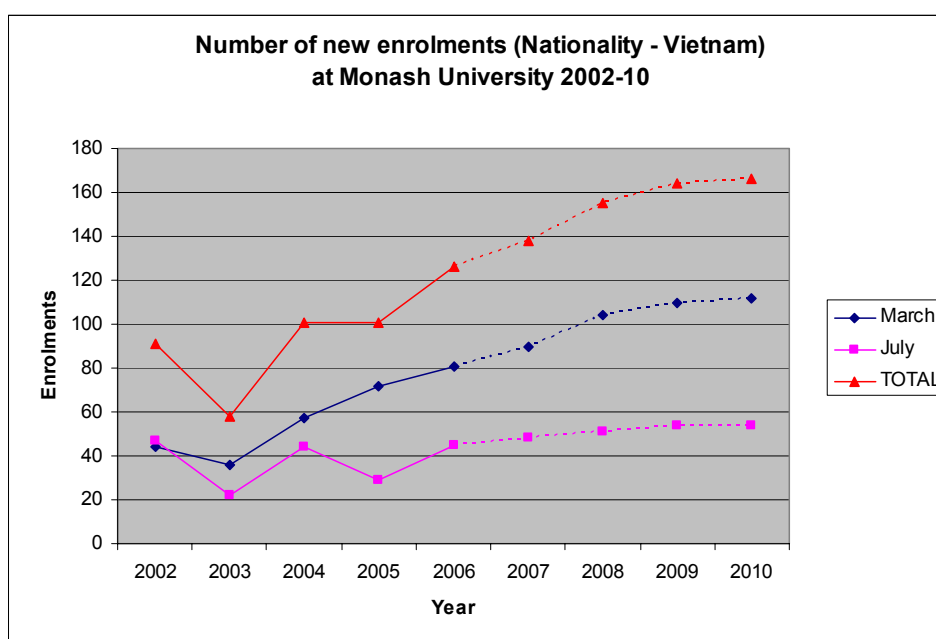
## Key strategic objectives

- Increase market share of quality students from competitors
- Convert overflow from exchange agreements into fee-paying study abroad students
- Increase the number of study abroad students enrolling at Monash campuses in Australia by building and deepening relationships existing partners (eg. DePaul, Denver, American University)
- Leverage opportunities for academic collaboration from existing study abroad and exchange agreements with US partners
- Pursue the development of a Monash Study Abroad Program in South Africa
- Increase Monash research profile through high level engagement with industry, education and government

## Vietnam

<b>Student visa assessment level</b>	AL3 (Higher Ed), AL2 (574 Master/PhD)
<b>Regional Manager</b>	Hoa Levitas
<b>Key agents</b>	IDP, HanoiTC, Pan Asia
<b>Levels of interest</b>	GPG, HDR
<b>Areas of greatest demand</b>	BusEco, IT, Engineering, Law
<b>Primary competitors</b>	RMIT, UNSW, U.Melbourne, UQ, USA
<b>Key recruitment periods</b>	March, August

## Enrolment projections



### **Market analysis**

- Australia captures 23% of the market of Vietnamese students studying abroad, with Monash the number 1 destination for students to Australia
- Australia remains an education leader with its long standing presence in the market and the success of the AusAID scholarship program
- Availability of scholarship funding from various government departments
- Fee paying students influenced by permanent residence drivers

### **Forecast**

- Increased competition in Vietnam, with growth to Australia expected to continue
- Enrolments to Monash from Vietnam expected to grow consistently in the immediate future

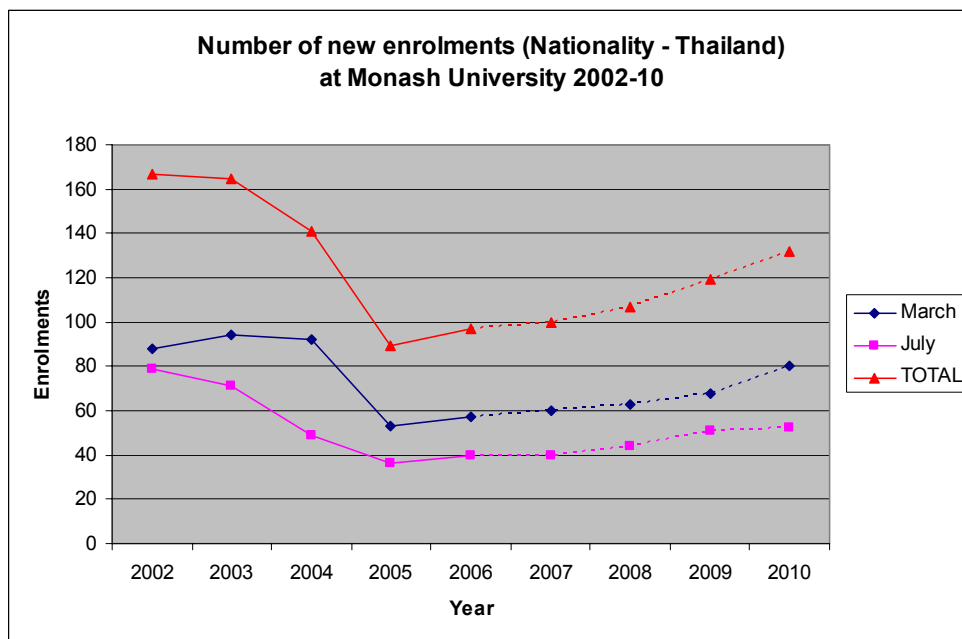
### **Key strategic objectives**

- Increase market share of quality students from competitors, and from pool of scholarships available
  - Sustain Monash brand presence and awareness in Vietnamese market
  - Train and engage the agent network by being supportive, responsive and reliable
  - Develop more transparent and clearly defined entrance requirements
  - Extend relationships and links with quality international schools and government bodies (central and provisional) across Vietnam
  - Strengthen alumni network in Vietnam
  - Broaden regions of engagement beyond traditional large city catchments of Hanoi and Ho Chi Minh City
-

## Thailand

<b>Student visa assessment level</b>	AL1
<b>Regional Manager</b>	Jarunun Hemnithi-Rogers
<b>Key agents</b>	IDP, Ednet, Insight, Apex, Mentor
<b>Levels of interest</b>	MUELC, UG, GPG
<b>Areas of greatest demand</b>	BusEco, IT, Engineering, Arts, Law
<b>Primary competitors</b>	UNSW, U.Melbourne, U.Sydney, RMIT, UK
<b>Key recruitment periods</b>	March, September/October

### Enrolment projections



### Market analysis

- Currency fluctuations have adversely impacted on international education market to Australia from Thailand
- Australia recently lost its position as the number 1 destination for Thais undertaking studying abroad
- Thailand has traditionally been a GPG market (packaged with ELICOS) for Australia, with some increases recently in undergraduate enrolments to Australia
- Increasing interest in HDR as more scholarships are being granted by Thai government and institutions in an attempt to enhance qualified academics for institutional expansion
- Increased competition in attracting Thai students and emergence of new competitors

### Forecast

- Enrolments to Monash from Thailand expected to experience steady growth, but not forecast to return to historical peaks of 2002-03

### Key strategic objectives

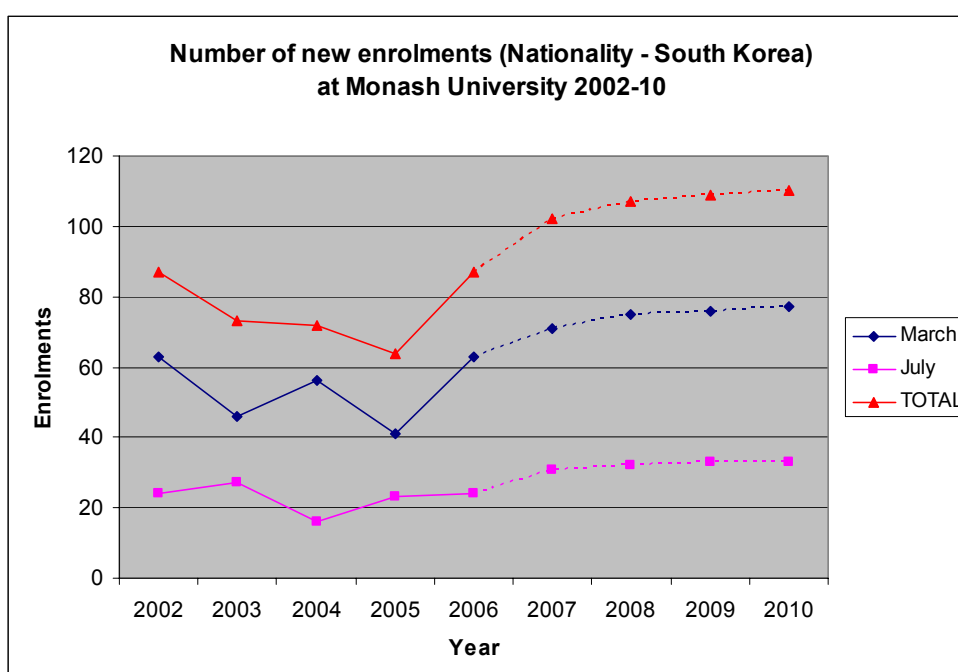
- Sustain Monash brand presence and awareness in Thai market through strategic media activity and coordination of advertising and marketing activity with Monash Malaysia

- Increase market share of quality students from competitors
- Enhance agent management and relationships, with focus on improved conversion of offers to enrolments via enhanced efficiencies within the admissions process
- Maintain and extend relationships and links with prominent international schools and institutions,
- Strengthen Alumni network in Thailand and develop alumni as a referral vehicle in recruitment activities

## South Korea

<b>Student visa assessment level</b>	AL2
<b>Regional Manager</b>	John Eckermann
<b>Key agents</b>	IAE EduNet, IDP, BaDa, MEIC
<b>Levels of interest</b>	MUELC, UG, GPG
<b>Areas of greatest demand</b>	BusEco, IT, Art & Design, Arts, Education
<b>Primary competitors</b>	UNSW, U.Sydney, RMIT, China
<b>Key recruitment periods</b>	March, September/October

### Enrolment projections



### Market analysis

- Australia has slipped from 3<sup>rd</sup> destination market in 2004 to 5<sup>th</sup> destination market in 2006 - behind USA, China, UK and Japan
- Australia is still a growth market, recording a +41% growth in enrolments 2002-2006
- English language acquisition is now more affordable with the establishment of English Villages in Korea. The rise of Chinese as a preferred second language is a greater threat to offshore education than in-country provision of English courses

- Korean universities are on a globalisation drive and actively seeking offshore partners
- More Koreans are coming to Australia on short-term working visas and for preliminary English. Local agents are a vital link in tracking and mining this supply channel.

### **Forecast**

- Increased competition in Korea, with growth to Australia expected to continue
- Stable growth expected in Monash enrolments from Korea in the immediate future

### **Key strategic objectives**

- Broaden Monash profile presence and awareness through improved media presence and engagement with industry, education and government
- Enhance co-operative approach with local agents to target and recruit Korean nationals coming to Australia on working visas and for preliminary English courses
- Train and engage the agent network by being supportive, responsive and reliable
- Promote the new MUELC options via agent network
- Maintain and extend relationships and links with schools and institutions, in order to develop a sustainable undergraduate market
- Coordinate Alumni and develop as a referral vehicle in recruitment activities