BRANDING PRIVATE HIGHER EDUCATION INSTITUTIONS IN AUSTRALIA TO INTERNATIONAL STUDENTS

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ABSTRACT

In 2009, there were 185 institutions in Australia approved by the Australian government to deliver higher education courses of which 71 are privately owned non self-accrediting higher education institutions delivering to both domestic and international students. In this paper, we describe the make-up of the Australian private education sector, concentrating in particular on the private higher education sector. We then investigate the challenges of branding private higher education institutions to international students in their quest to compete in the essentially the same marketplace as universities.

THE GROWTH OF PRIVATE EDUCATION IN AUSTRALIA AND INTERNATIONALLY

Education is Australia's third largest export, earning more than AUD$14 billion per annum for the years 2007-2008 (Access Economics 2009) ranked after coal and iron ore exports. The private education sector includes private schools, vocational education and training colleges (VET), English Language Intensive Courses for Overseas Students (ELICOS), institutions and higher education providers (DFAT, 2008). Each international student studying in Australia contributes an average of AUD$29,000 in value added to the Australian economy (including family and friends) while generating 0.29 FTE (full time equivalent) workers in Australia (Access Economics, 2009, p. i). DEEWR (2010a) states that there are 440 000 international students from 190 countries studying in courses in Australia in 2008; this was an 18% increase over 2007.

In higher education, international student enrolments increased by 5% from 2007 to 2008 to 182 770 students (DEEWR, 2010a). With 90% of international higher education students enrolling in public universities, the private higher education sector comprises around 10% of international student enrolments in the higher education sector (DFAT, 2008). International students enrolment grew by 46% from 2007 to 2008 to reach 175 461 students in 2008 in the VET sector, with most of the students studying for a Diploma or an Advanced Diploma (DEEWR, 2010a). In the ELICOS sector, international students enrolment increased by 23% to reach 125 727 students in 2008. Almost 75% of these enrolments were with private providers. International students enrolment in schools rose by 7% to reach 28 700 students in 2008.

There is an average of 16% per annum growth in the international education sector (Education Export Strategy 2009-2020, p. 3) with Victoria and New South Wales accounting for over 70% of the total export earnings. Growth in the higher education industry has also resulted in a number of extremely profitable businesses. Navitas Limited, for example, an Australian company with business ventures in university pathway programs, English language colleges, workforce and training programs, as well as student recruitment services earned AUD$217 million for the half year ended 31 December 2008, with profits of $19 million (Navitas Limited, 2009).

Private education is an internationally competitive industry. Within the Asian region Malaysia, Singapore, Hong Kong and Thailand are fast becoming more internationally competitive in the private higher education sector. In 2009, Singapore is home to 16 distinguished foreign tertiary (comprising mostly higher education) institutions, according to INSEAD (Singapore Economic Development Board, 2009) attracting some 86,000 international students. These institutions include INSEAD, the Tisch School of the Arts, Duke University School of Medicine and the University of Nevada Las Vegas. To demonstrate its commitment in encouraging private education, Singapore is now establishing a new *Private Education Act* to enhance regulation in the private education sector. The environment for providing education to international students is so competitive that Asia is set to account for 70% of the global demand for international higher education by 2025.

Malaysia meanwhile was ranked the world's 11th most preferred study destination by the Institute of International Education (Lim, 2009). Malaysia achieved a 26% increase in 2009 in international student numbers compared to 2008 and is estimated to reach 80,000 students in 2010. The Malaysian government has stressed the importance of private education providers in educating future generations as well as being an export commodity for Malaysia given the limited public funding by the government for higher education. The Malaysian government is also providing systems and structures conducive to private education providers such as the Investment Tax Allowance (ITA) for Science and Technology programs, reductions in software license fees, and tax exemptions for online journal subscriptions and broadband services. This is in part a response to Malaysian students leaving the country to be educated in Australia, USA and England. Each student that leaves Malaysia spends almost RM$1 million subsidising their overseas education activity. The Malaysian government also realises the importance of branding the Malaysian higher education industry and is now accrediting all higher education providers through the MQA (Malaysian Quality Agency) to ensure the provision of high-end facilities and locations, and to support high quality performing providers. Repeatedly, the Malaysian government has stressed the need for a credible private education sector (Lim, 2009).

Despite the fact that private higher education is a growth industry, is internationally competitive, and at times highly profitable, this sector has not been well researched. There is little understanding of what the private higher education sector is and how it competes in the broader international higher education sector. This paper will address the branding of private higher education institutions in Australia and the related branding aspects when marketing to international students. Specifically this paper addresses how brands are built by and for private higher education institutions and what factors affect their brands. A number of research areas are then proposed in this paper.

THE AUSTRALIAN HIGHER EDUCATION SECTOR

A: OVERVIEW

Higher education institutions in Australia are those that are approved to deliver higher education qualifications as defined by the Australian Qualifications Framework (AQF, 2007). The higher education sector in Australia consists of two broad categories: higher education institutions which are self-accrediting (including universities) and those that are not self-accrediting. According to Thornton (2005, p.1) Australia's higher education landscape was substantially changed by the Dawkins reforms of 1988, which 'at the stroke of a pen' more than doubled the number of Australian universities and consequently perpetuated a rapid increase in the number of graduates. The reforms integrated colleges of advanced education and universities within a unified system of higher education creating larger and more business-like universities premised on conglomeration and economies of scale (Marginson, 2005, p.1).

While the Dawkins reforms were successful in opening up the higher education sector to many prospective students who had previously been excluded, it resulted in a highly homogeneous university sector (Meek & Massaro, 2008, p.3) where each of Australia's 37 public universities looked much like the other, doing essentially the same kinds of things and providing little choice to students and little choice in educational opportunities (Trood, 2005, p.2).

The gap in the tertiary education sector created by the 'Dawkinisation' of colleges of advanced education, teachers' colleges and some technical colleges has been steadily filled by the emergence of specialist niche private providers of higher education operating as non self-accrediting institutions. This new wave of private higher education providers is fuelled by the desire of high level vocational training providers to move into the higher education sector and extend their course offerings beyond the advanced diploma level.

B: THE MAKE-UP OF THE AUSTRALIAN HIGHER EDUCATION SECTOR

As at December 2009, the Australian higher education sector comprised 185 unique entities with approval to issue higher education qualifications as defined by the Australian Qualifications Framework. Of these, 42 were self-accrediting institutions (predominantly universities), 2 were foreign universities (which are partially self-accrediting) and 141 were non self-accrediting institutions.

C: THE SELF-ACCREDITING (UNIVERSITY) SECTOR

There are 44 self-accrediting higher education institutions operating in the Australian higher education marketplace. Table 1 breaks these institutions down into a number of discrete categories, the significance of which is described in more detail below.

Table 1: Self-accrediting institutions by category

Cat #	Category	Number of Institutions
1	Public universities	37
2	Public self-accrediting institutions	2
3	Private universities	2
4	Private self-accrediting institutions	1
5	Foreign universities	2
	Total institutions	44

The current make-up of category 1 represents Australia's public universities. These are very much a product of the Dawkins' reforms as previously described. Category 2 represents the two public institutions (Australian Film, Television and Radio School, and Batchelor Institute of Indigenous Tertiary Education) which have been granted self-accrediting status but are not entitled to use the word 'university' in their title. Category 3 represents the two Australian private institutions with approval to operate as universities in the higher education sector (Bond University and University of Notre Dame Australia). Category 4 represents the one private institution (Melbourne College of Divinity) that, while not a university, has been granted self-accrediting status. Category 5 represents the two foreign universities which have been given approval to operate within Australia (Carnegie Mellon and Heriot-Watt). Although these universities are self-accrediting in their home jurisdictions their courses must be individually listed on the state and territory higher education registers in the jurisdictions within which they offer those courses in Australia.

Categories 1 and 2 are publicly owned institutions, with the exception of the Australian Catholic University which is owned by the Catholic Church; Categories 3 and 4 represent Australian owned private institutions; while Category 5 represents foreign entities with permission to operate within Australia using the title 'university'.

Historically, universities are aligned with a city or geographical region; however, it is the respective states and territories who 'own' the public institutions through various legislative instruments. Table 2 shows universities (and other self-accrediting institutions) aligned to their primary jurisdiction and identifies the number of publicly funded, privately owned and foreign universities operating within Australia.

Table 2: Self-accrediting institutions by primary jurisdiction

Primary Jurisdiction	Number of institutions			
	Total	Public	Private	Foreign
New South Wales	13	12[a]		1
Victoria	9	8	1	
Queensland	8	7	1	
South Australia	4	3		1
Western Australia	5	4	1[b]	
Tasmania	1	1		
ACT	2	2		
Northern Territory	2	2		
Total	44	39	3	2

Note a: The Australian Catholic University is recognised by statute in New South Wales and Victoria and operates across a number of jurisdictions including NSW, Victoria, Queensland and ACT.
Note b: University of Notre Dame Australia also operates in NSW.

Universities traditionally focus their operations within their city of origin, or in the case of regional universities, their specific geographical mandate. However, they often operate campuses in other jurisdictions, in their own right, through wholly owned subsidiaries, or through a service or licensing arrangement with a third party. Therefore, although there are 44 unique institutions, the number of points of presence is much higher by virtue of these arrangements.

D: THE NON SELF-ACCREDITING HIGHER EDUCATION SECTOR

Non self-accrediting institutions (NSAIs) occupy a small but important part of the higher education sector and can be delineated into a number of categories as shown in Table 3 below.

Table 3: NSAIs by type of Institution

Type of Institution	No.	%
Private entity	71	50
Professional / membership association	14	10
Faith-based institution	34	24
Government instrumentality	18	13
University private arm	4	3
TOTAL	141	100%

While there are 141 unique institutions, 25 operate across multiple jurisdictions. As a result the number of higher education approvals totals 205 and is distributed across the various jurisdictions as shown in Table 4 below.

Table 4: NSAIs by jurisdiction

Jurisdiction	Approvals	%
New South Wales	56	27
Victoria	49	24
Queensland	35	17
South Australia	28	14
Western Australia	23	11
Tasmania	6	3
ACT	5	3
Northern Territory	3	1
Total	205	100%

Based on published records, some significant statistics can be derived about NSAIs:

- 18% (25) operate in more than one jurisdiction.
- 56% (79) have gained approval to offer FEE-HELP support to their students since March 2005.
- Over half (83) are also Registered Training Organisations (RTOs) delivering vocational training as well as higher education courses.
- 57% (81) offer courses at postgraduate level.
- 11% (16) offer research degrees.

- 67% (94) are approved to deliver courses to international students.

The number of institutions that offer both vocational and higher education (i.e. dual sector providers) is a function of their origin in the vocational training sector and accounts for many of the recent entrants in the private entity category. Their transition to higher education has represented an option for those RTOs wishing to avoid the constraints of national curricula (ACPET, 2008, p.18) and those wanting to offer higher-level certification, especially postgraduate qualifications.

It is worth noting that NSAIs are also embracing research, with 20 offering research degrees at masters or doctoral level. Not unlike the university sector, NSAIs rely on international students to supplement enrolments with 95 being listed on the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS). Of particular significance is the number of new institutions being registered to deliver higher education courses, with 35 being approved in the five year period from 2005-2009 (Ryan, 2009).

THE IMPORTANCE OF BRANDING EDUCATION

Private higher education providers have grown in numbers dramatically over the past decade to become indispensable players in the Australian higher education industry. Dr Bhayan, CFO of Michigan State University Dubai said that the term “marketised” means allowing higher education to be marketed to the masses as opposed to the elite (Bhayan, 2010) and where purposes of marketisation include freeing markets in higher education to provide academic institutions with incentives to improve the quality of teaching and research, to enhance academic productivity, and to stimulate innovations in academic programs, all mainly to benefit the larger society. However, the marketisation of education is followed by a proliferation education institutions, mainly private educational institutions. Being able to attract and compete for students then becomes an indispensable fact for these private educational institutions. The importance of branding cannot be overemphasised, particularly in times of the Global Financial Crisis (GFC) when marketing intangible products, such as services, rely on branding to communicate to their consumer segments. For example, with financial services providers such as Babcock & Brown re-branding themselves (to Everest Financial Group) after disasters in the marketplace, brands are capable of conveying the culture of a service and value to the customer (Boreham, 2010).

Top-of-mind responses from service organisations suggest that managers perceive branding as major sources of advantage for their organisations (Gray, 2006). Research into branding education products has been led primarily by universities (see e.g. Arenson, 2004; Chapleo, 2003; Holmes, 2003; Gifford, 2004, and Reader, 2003), stressing the importance of being able to successfully build a brand for each educational institution. These articles describe how universities can use branding strategies to differentiate themselves, for example by creating a sense of community between the educational product and its customers (Arenson, 2004), and by using practical activities in creating a brand (Chapleo, 2003; Gifford, 2004; Holmes, 2003). There also exists a number of articles dealing with branding in schools, such as those by Oplatka and Helmsley-Brown (2004), positioning schools using marketing plans (e.g. Harvey, 1996), communicating with a school’s customers and clients (Hall, 1996), and brand valuation (Roberts, 1998). The paper by Heaney, Heaney and Ross (2006) provided a Strategic 3-Step *Brand Building Model* for schools and educational institutions, providing a contribution to building brand equity in the educational services sector.

Branding is all important when it comes to attracting and retaining students to a particular higher education institution. There are a number of factors which naturally draw students to a university: a) a historically established brand based on how long a university has been established, which includes the prior generations of a prospective student having graduated from that university; b) attractive campuses in good locations, with lush grass-filled lawns and historical buildings or contemporary buildings which boast state of the art facilities; c) internationally known faculty and researchers as well as well known products which can be attributed to the university or a faculty member, and d) public perception that large, established universities are best suited to educate the young. Branding an established university is not difficult, particularly if it is one of the "Sandstone 8" of Australia. All of this has resulted in an uneven playing field when prestigious universities attract better students and can attract education funding from the government (Bhayani, 2010).

Private higher education institutions may be vulnerable in many aspects: a) some institutions are more dependent on international students compared to public universities. Some international students undertake courses in fields such as business and accounting simply to gain points towards being granted an Australian permanent residency visa; b) if an institution is more dependent on international students, then issues that affect international students will impact these institutions to a greater extent, such as the recent racist attacks in Australia on Indian students; c) tuition fees of private higher education institutions are not subsidised by the government which means that all students attending private higher education institutions have to pay full fees. This creates a natural preference by domestic Australian students towards public universities making private higher education institutions even more dependent on the international market; and d) public universities, as discussed before, are already more embedded and established in the national and international educational arena, making public universities much more attractive and stable compared to private higher education providers.

Private higher education institutions need to be aware that there are a multitude of factors which can affect their viability. They need to carefully and conscientiously market their brand to international students to ensure their continued success.

BRANDING PRIVATE HIGHER EDUCATION INSTITUTIONS IN AUSTRALIA TO INTERNATIONAL STUDENTS: THE THREE LAYERED CORPORATE BRAND EQUITY MATRIX

Education Export Strategy (2009-2020) states that there are three layers of brands in the mix of exporting education: a) the Australian brand, which leverage decisions on the overall quality and value of being educated in Australia, b) the state brand, which reinforces a student's decision to choose a particular location, with the brand built based on the local environment, and c) the educational institution, which competes with other institutions on reputation and performance. It is proposed in this paper that private higher education institutions should consider building a corporate brand at each of these three levels. The corporate brand comprises three main aspects: Core Values, Internal Marketing of the corporate brand (e.g. employees, suppliers, board members, administration), and External Marketing of the brand (e.g. customers, community, government, and associations) (Heaney and Heaney, 2008). All of these stakeholders interact with the Core Values established by either the stakeholders or as a tenet of the institution's charter. Corporate brand equity needs to be developed for private higher education providers as these institutions are reliant on a large number of variables that can destabilise the organisation which in turn affects the performance of the institution. Because private higher education institutions are for the most part profit-making entities, they must be able to self-fund any loss making activities as well. Any one of their core values, internal or external marketing aspects can seriously affect a smaller institution that does not have the backing of public funding and reputation.

It is therefore proposed in this paper that each private higher education institution in Australia has to be aware of a matrix of factors that can affect them. This is depicted in Table 5. Each of these combined factors will now be explained.

Table 5: Matrix of corporate branding at three levels

Level	Core Values	Internal Marketing	External Marketing
International	A	B	C
State	D	E	F
Industry/ Institutional	G	H	I

A: CORE VALUES: INTERNATIONAL LEVEL

Core values of a country convey a very powerful message to the world as to what is important to each country. Adherence to personal and intellectual freedom, creativity, and a democratic nation makes Australia very desirable for many who seek countries with this type of philosophy. However, the Australian image has taken a battering in the past few months. The so-called "racist" attacks on Indian students, particularly in Melbourne, and the stabbing death of an Indian accounting graduate of Central Queensland University has resulted in Indian student enrolments dropping 20% for the University. Tourism Australia is forecasting that there will be 4000 fewer Indian students studying in Australia in 2010, costing the Australian economy $78 million (Wilson and Callick, 2010). In response the Australian government has organised diplomatic talks and representations to India to address this issue with high level authorities.

B. INTERNAL MARKETING: INTERNATIONAL LEVEL

These concern how the Australian government regulates the higher education sector, including aspects such as accreditation, visa processing, and financial guarantees. The Australian government department responsible for administering higher education policies and programs is the Department of Education, Employment and Workplace Relations (DEEWR). The responsibility for regulation and governance for higher education vests with the Australian Government, in conjunction with the various State and Territory Governments and the institutions themselves. The Australian Qualifications Framework (AQF) lists the characteristics for qualifications accredited through the higher education sector and all accredited higher education providers are listed on the AQF register (DEEWR, 2010b). The Australian higher education sector is therefore highly regulated.

ACPET (Australian Council for Private Education and Training) is an independent body established to assist private education providers. It is a national industry association for private education providers of post-compulsory education and training, with over 1000 members (ACPET, 2006). More importantly, ACPET is now the major provider of tuition assurance for international students studying in the private education sector. ACPET estimates that private education providers contribute an estimated $400million to the NSW economy through VET, ELICOS and higher education (ACPET, 2004). In relation to private higher education, ACPET (2004) states that private education providers play a crucial role in expanding educational opportunities outside the boundaries of government funded education; have the ability to provide customised education for the requirements of the students and markets; have flexible management structures; and responsive and innovative curriculum processes. Private providers also tend to focus on job outcomes by producing highly regarded and employable graduates. The establishment and continuing role of ACPET has created a stabilising factor when marketing to international students as well as ensuring the quality and continuation of private educational institutions.

C. EXTERNAL MARKETING: INTERNATIONAL LEVEL

In external marketing, the Australian government has to convey to prospective students and countries the Australian image, as well as the quality of the Australian education system. To ensure that the correct perception and brand is conveyed advertising campaigns, envoys and diplomats (such as those dispatched to India recently due to the issues faced by Indian students), and embassies are important aspects of establishing relationships and channels of communication. The Australian government has made marketing Australian education a priority, through the government supported AEI (Australian Education International), the international arm of DEEWR, which seeks to support the Australian government develop an international education and training system (see AEI, 2010). As well, privately owned IDP Education markets actively for many educational institutions in a large number of countries.

D: CORE VALUES: STATE LEVEL

Each state's government must make a commitment to support international students undertaking education in their state or territory. This includes actual physical places where students can seek support, and advisory services (e.g. agents, immigration centres), the availability of affordable accommodation, the availability of employment and access to many other aspects fundamental to other Australians, such as appropriate healthcare.

E: INTERNAL MARKETING: STATE LEVEL

States need to ensure that the quality and standards of the courses offered and the viability of each higher education institution is maintained. An important factor is each state's accreditation agency. In NSW for example, the NSW Higher Education Directorate (HED) accredits private higher education providers. The assessment panels accrediting private higher education institutions comprise experts from relevant university and industry sectors. Peer involvement therefore ensures the quality and relevance of the courses offered by private higher education institutions. In addition, private higher education institutions are also required to pay substantial regulatory fees, comply with the requirements of the *Education Services for Overseas Students (ESOS) Act 2000* when marketing and delivering courses to international students, as well as provide appropriate tuition assurance arrangements to ensure the continuity of providing courses to enrolled students.

F: EXTERNAL MARKETING: STATE LEVEL

States, however, need to also ensure more than educational quality. Each state needs to conscientiously market to international students because essentially, each state is a competitor of the other. Each state therefore needs to showcase and use each of their environmental and regulatory nuances to the fullest extent. The NSW and Victorian governments have obviously taken advantage of their core and internal brands to capture 70% of the international student market (Education Export Strategy, 2009-2020). NSW has a market share of almost 45% of the international education sector. This equates to more than $400 million in education revenue alone, without including contributions to the economy from things like food, entertainment, accommodation, and other day-to-day expenses (ACPET, 2004).

G: CORE VALUES: INSTITUTIONAL LEVEL

The core values or culture of a private higher education provider is crucial to the success of the institution. As private higher education providers are much smaller than universities they have a much closer knit administrative and academic staff. A typical core group comprises full-time academic and administrative staff, with a number of sessional lecturers and tutors who deliver the education to students. The culture of the institution driven by these full-time staff members will influence academic standards, marketing values and philosophy, and the overall governance of the institution. In contrast with larger institutions such as universities, normally only one set of academic and administrative processes and standards permeates throughout a private higher education provider. For example, scholarship may flourish or diminish in a private higher education provider depending on the governance and support provided for scholarship; student pastoral care (or lack thereof) which may vary from one faculty to another in a large university is usually more or less equally implemented in a smaller private higher education institution. It is important that private higher education institutions “get it right” from the beginning to prevent the problems of inconsistent standards persisting throughout an institution. Private higher education providers may become known for their culture, as opposed to specific faculties or departments in larger universities which have different cultures or standards and can better survive difficulties when one faculty or department is deficient.

H: INTERNAL MARKETING: INSTITUTIONAL LEVEL

Gray (2006) states that brand strength appears to be increased in the event of increased communication between staff (internal communication) so that staff can understand what the institution’s students need, in the ability to integrate marketing communications of all the stakeholders, and when an institution invests in their people. Every different stakeholder is important in a private higher education institution: from the external board member who may be a professor from a university, to a sessional lecturer who teaches at the institution. Whereas board members at universities may not be visible to most of the employees in a large public university, board members or governance members in a private higher education institution may work closely with the upper echelon of management in a private higher education institution, providing strategic direction, advice and guidance on a large number of issues. Communication and accountability between the governance committees and the institution is closely watched by the higher education assessment panels; therefore good quality governance for the private higher education institution is crucial and ensures that the institution is financially and academically stable.

I: EXTERNAL MARKETING: INSTITUTIONAL LEVEL

At the end of the day, all higher education institutions have to market themselves. So what is the difference when it comes to branding the private higher education institution? The problem here is that the brand equity of private higher education institutions can be extremely poor. With a choice of 71 private higher education institutions, prospective students may end up discriminating purely on price or reputation – the visible factors. However, private higher education institutions can afford to be savvy when it comes to establishing their brands. Their courses can be tailored to specific niches, and with smaller class sizes, the private higher education institution can move quickly to fill gaps that appear in the marketplace and to address industry needs. For example, if there is a gap in environmental sciences, a private higher education institution can move much quicker to research, plan and accredit their courses if they have a solid governance structure and a cohesive team. Private higher education institutions tend to specialise, so their marketing team can concentrate better on particular market segments. Table 6 therefore illustrates all of these aspects in the branding matrix.

Table 6: Matrix of applied corporate branding at three levels

Level	Core Values	Internal Marketing	External Marketing
International	Ideology of a country	Government educational administration	International marketing and peak government marketing authorities
State	Commitment and support for students	Government student support services	Cohesive state marketing bodies
Industry/ Institutional	Institutional culture and cohesiveness	Institutional governance and communication	Marketing to prospective students

SUMMARY AND RESEARCH IMPLICATIONS

This paper discusses the branding of private higher education institutions in the international marketplace. Private higher education plays a large part in the Australian education export sector and will continue to grow due to its flexibility in responding to student and industry needs for higher education institutions that specialise in specific industries or educational areas, such as business, information technology, hospitality or the creative industries, to name a few.

However, there are challenges in branding private higher education institutions. They are smaller institutions, and yet they compete at the international, state and institutional level for international students. This paper contributes to the understanding of branding education, in particular to private higher education institutions marketing to international students through a conceptual matrix of the three levels of branding, utilising three aspects of a corporate brand.

Future research should entail case studies of the relative success of private higher education institutions in marketing to international students. Much more research on the marketing aspects, as well as the quality aspect is needed on the structures of each institution, and the critical success factors need to be examined in detail to ensure that this important industry remains financially viable and therefore academically sound.

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