Taking a Wide Angle Lens to "Market Analysis"

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Our Analysis "Problem"

- Gaining a deeper understanding of the regional nature of higher education provision in Ireland.

- Institutional context: DCU Incorporation
  - DCU "incorporating" with 3 Colleges of Education
  - Change in discipline mix within new DCU
  - Change to student profile, research profile

- Building on existing work
  - Largely based on DCU-only data on applications
  - "Student Experience" insight provided by new DCU Students

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Higher Education & Market Analysis

The analysis, planning, implementation and control of carefully formulated programmes designed to being about voluntary exchanges of values with a target market to achieve organisational objectives

Koteler & Fox (1985)

Demand Side Analysis

- Focus on factors in choice by prospective students

- How is our brand understood by external stakeholders, i.e. prospective students

Supply Side Analysis

- How does our programme portfolio reflect our regional and national "position"

- "Market" segmentation/ differentiation- refining our activities

DCU's Approach

Understanding the decision making process

Insight into our regional and national strengths

1st Year Student Experience Survey

Prospective Student Analysis

Programme Portfolio Analysis

Market Share Analysis
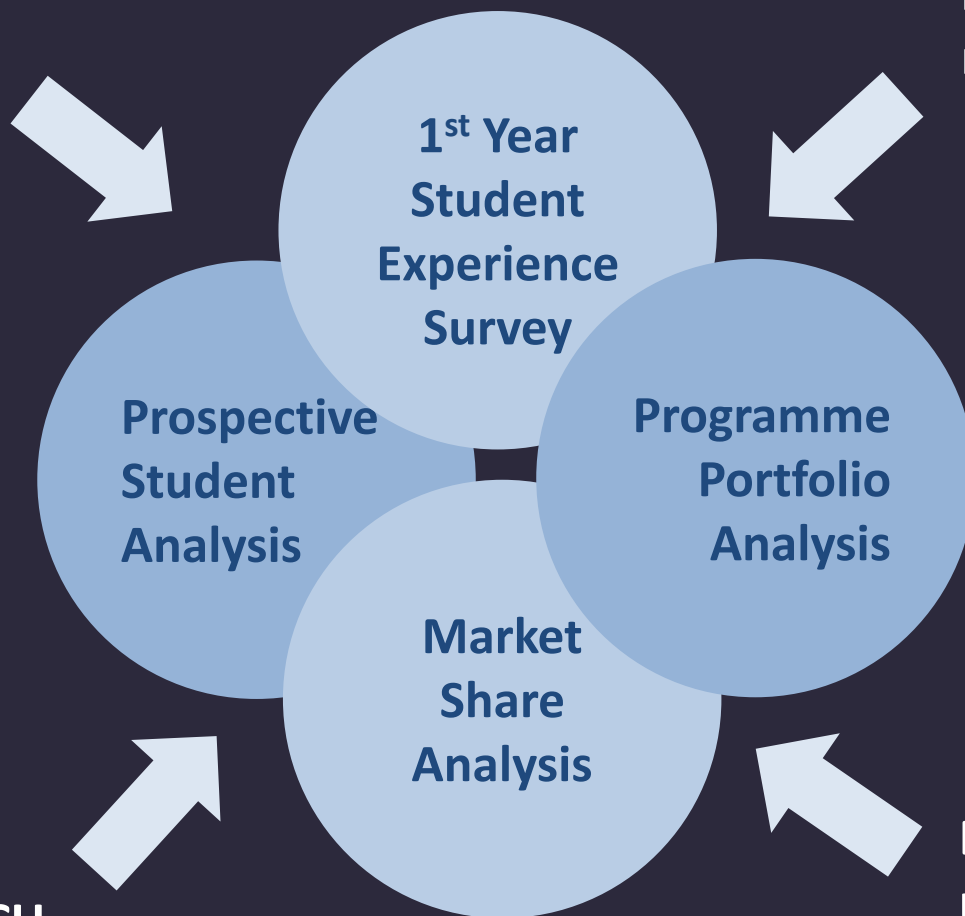
Insight into DCU Brand

Examining programme "fit" regionally and nationally

Results- Quantitative

Size of Higher Education Market Share in the Region

| Area	Total HE entry	DCU entrants	DCU % market	Total schools
Dublin 13,17 and North County	3819	738	17%	20
Dublin 7,9,11	2853	612	18%	25
Co. Meath	4295	467	10%	20
Dublin 1,3,5	2297	373	13%	15
Co. Louth	3640	345	9%	15
Co. Kildare	5211	319	5%	27
Dublin 2, 4, 8	3355	269	6%	16
Dublin 15,20	2355	233	8%	10
Co. Monaghan	2081	205	10%	12
Co. Cavan	1660	179	10%	10
Co. Westmeath	3247	178	5%	15

Defined Areas of Geographic Strength- as geographically close areas of relative weakness, particularly in South Dublin

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Results- Quantitative- Demand Side

School	County	2012-14 % HE	2012-14 DCU	2012-14 DCU Share	Inst 1	Inst 2	Inst 3
Belvedere College	Dublin 1	95%	98	20%	TCD - 130	DCU - 98	UCD - 84
Larkin Community College	Dublin 1	31%	1	3%	DIT - 11	UCD - 34	ITC/DKIT/ITT - 2
Mount Carmel Secondary School	Dublin 1	48%	9	14%	DIT - 14	DCU - 9	TCD - 7
Scoil Uí Chonaill	Dublin 1	46%	21	12%	UCD/NUIM - 2	DCU - 21	TCD - 16
Holy Faith Secondary School	Dublin 3	93%	42	16%	TCD - 64	DIT - 46	DCU - 42
Marino College	Dublin 3	17%	1	6%	TCD - 4	UCD - 3	DIT - 2
Mount Temple Comprehensive	Dublin 3	73%	52	18%	DIT - 67	TCD - 53	DCU - 52
Scoil Ioseph Naofa	Dublin 3	49%	8	13%	DIT - 12	UCD/DCU - 8	TCD - 7

Summary Analysis- Elements

- Market Share Analysis, Trend Analysis

- Collation of range of school engagement
  - Student recruitment activity
  - DCU Access Engagement
  - Faculty Initiatives
  - Campus Events

- Recommendations
  - Evaluation of Transport Links
  - School engagement activity
  - Regional media spend
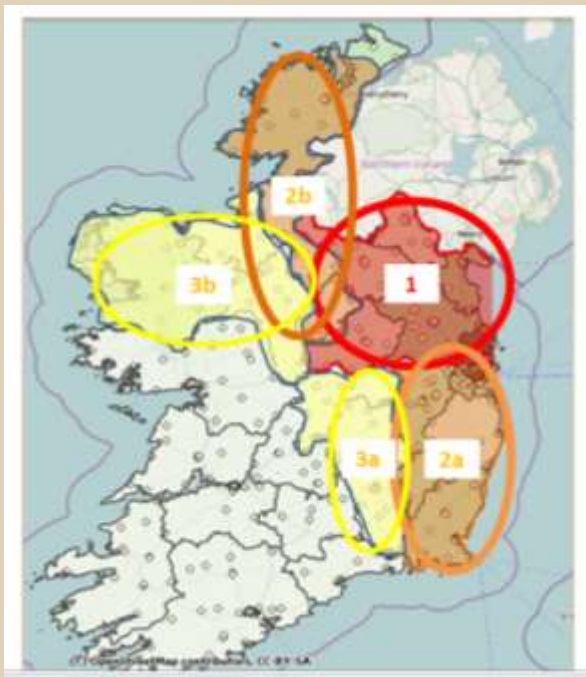
Results- Quantitative- Supply Side

Examining the demand and supply of CAO applications, and "quality" of successful applicants

Identifying areas of emerging strength………….

Institution	Subject Area	Course	Point Data		Applicant Data		
			2014 Min	2014 Med	2015 1st Pref	2015 1,2,3	2015 Total
TCD	Psychology	Psychology	555	575			
UCD	Psychology	Psychology	510	530			
DCU	Psychology	Psychology	510	535	134	446	951
Maynooth	Psychology	Psychology	505	515			
Maynooth	Psychology	Psychology (through Science)	470	495			
IADT	Psychology	Applied Psychology	350	395			
NCI	Psychology	Psychology	310	345			
DBS	Psychology	Psychology	225	320			

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Results- Quantitative- Supply Side

…. And rethinking some perceived strengths………….

Institution	Subject Area	Course	Point Data		Applicant Data		
			2014 Min	2014 Med	2015 1st Pref	2015 1,2,3	2015 Total
Maynooth	Communications & Media	Media Studies	460	485			
DIT	Communications & Media	Film and Broadcasting	455	480			
DIT	Communications & Media	Film and Broadcasting with a Language	450	490			
DCU	Communications & Media	Journalism	440	480	126	337	863
DCU	Communications & Media	Communication Studies	415	455	187	431	791
DCU	Communications & Media	Multimedia	415	450	158	398	781
DIT	Communications & Media	Journalism	395	410			
Maynooth	Communications & Media	Digital Media	360	390			
DIT	Communications & Media	Journalism with a Language	360	390			

Results- Qualitative

- Focused on Prospective Students- independently conducted

- Elements:
  - Interviews
  - Ethnographic review of Higher Option Fair and Open Day
  - Online "Ideas Blogs"- discussion groups and task based activities

If DCU was a celebrity, which would it be…..

"I feel Laura Whitmore fits the personality of DCU, she is young, ambitious and very talented! She is not just a pretty face (as DCU is so much more than its amazing campus), she is hard-working, dedicated and has achieved a lot in a short space of time"

High Level Conclusions- Reaffirming "Reality"

- Regional nature of Higher Education in Ireland
  - For DCU, North Dublin, and the "Eastern Corridor"

- Programme content drives decision-makers
  - Ahead of institution prestige, campus facilities, location

- Regional and National Leadership in a number of areas
  - Strong programme offerings in Health and Human Performance, Nursing
  - Post- Incorporation national profile in teacher education

- DCU low market share in South Dublin
  - DCU outreach can play a more active role
  - Examination of accessibility of campus

Changing our Perceptions.....

- "Prestige" not an important factor in applicant decision-making

- A revision of traditional thinking on DCU's competitors

- Programme Portfolio- new insights
  - Trading on past glory?
  - Positioning new DCU programmes

- Importance of the CAO Change of Mind
  - Where the real decision-making happens

How is the information being used?

- **Recruitment and Marketing activity**

- **Future Academic Portfolio**

- **Events Planning**

- **Transport Planning**

Questions/ Comments

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