



Research on marketing, innovation, outreach and communication strategy of non-formal training providers in Kosovo

September 2022

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Executive Summary

The research on marketing, innovation, outreach and communication strategy of non-formal training providers in Kosovo was conducted with the purpose to analyse marketing efforts of non-formal training providers, partners and non-partners of EYE project, and the report aims to shed some light in understanding the capacities of the providers, type of training they deliver, relevance of curricula, marketing and innovation methods used and especially further investments needed to reach better quality of trainings, how to reach a bigger audience of students and also increase the outreach to socially excluded groups.

In-depth interviews with eight non-formal training providers were conducted. The eight non-formal training providers were specifically chosen as a representation of the sector with the aim to cover a variety of fields they operate, and also all regions. Whereas to complete the picture the opinion of 62 beneficiaries of the training programs was gathered via an online quantitative survey. On top of that extensive desk research in order to understand similar previous work done, and to understand the current state of art was done. The online profile and presence of each non-formal training provider was analysed carefully in order to check the current approaches used by non-formal training providers.

The research reveals that the beneficiaries in general evaluated the trainings that they followed very highly. To do that, Net promoter score, which is a popular form used to measure customer loyalty and how likely they are to refer services to others was used. According to this measure 82% of the participants were very satisfied with the trainings, and are

expected to promote it to future potential students, only 6% are detractors, meaning that they were not satisfied with the trainings, and can talk negative about the experience, and 12% have a neutral opinion about the training that they followed, and will not talk much about it.

With that being said non-formal training providers have declared that they are facing issues with recruiting new students. Most of the training providers are fairly newly established training institutions, and they were mainly focused in building up the infrastructure and have used up most of the funds doing that. The study also reveals that training providers have a lot of room to improve in building internal capacities, but also in clarifying marketing strategies and building up a brand name, especially because the beneficiaries of the training programs stated that they heard about the program from friends and family, as the most frequent mentioned method, and not because of the brand. Training providers have to be clear about their target markets, and should have specific communication methods for each of them. There are many attempts to offer trainings from a lot of companies, and this has had a negative effect on the prices of trainings, which is the second biggest struggle according to the non-formal training providers.

The research also reveals that very limited efforts are made towards reaching social excluded groups. Training providers believe that by targeting everyone, they are not excluding any group.

Introduction



Enhancing Youth Employment (EYE) is a program funded by the Swiss Agency for Development and Cooperation in Kosovo and implemented by the consortium of HELVETAS Swiss Intercooperation Kosovo (HSIK) and Management Development Associates (MDA).

The overall goal of EYE phase III is to increase the employability of young women and men in Kosovo. It will be achieved in a socially inclusive and sustainable way through systemic interventions in two interrelated areas: (1) Young women and men in Kosovo increase their employability by enhanced market demanded skills through improved access to training through industry-led non-formal training providers and non-formal training institutions (2) Young women and men can make better-informed career choices due to a more demand-driven career guidance system, while at the same time benefiting from a more efficient labour market information system.

Among the main objectives of Skills Development Outcome during EYE phase 3 is improving the quality/relevance of the non-formal training market in Kosovo, increase participation of youth in the trainings and enhance employment. Therefore, EYE is focused to work on development of marketing and communication channels of non-formal training providers and building internal capacities of the non-formal training providers to enhance quality of the trainings delivered by them and increase the outreach.

This study was commissioned to analyse marketing of non-formal training providers, partners and non-partners of EYE project and the report aims to shed some light in understanding the capacities of the providers, type of training they deliver, relevance of curricula, marketing and innovation methods and especially further investments needed to reach better quality of trainings, how to reach a bigger audience of students and increase the outreach to socially excluded groups.

Methodology

For the research on marketing, innovation, outreach and communication strategy of non-formal training providers in Kosovo two research approaches for data collection were used, qualitative in-depth interviews in order to collect information from the non-formal training providers regarding their marketing strategy and efforts, and quantitative survey with beneficiaries (students) to understand how they were informed about the training that they have undergone.

On top of that extensive desk research was performed in order to understand similar previous work done, and to understand the current state of art. The online profile of each non-formal training provider was analysed carefully in order to check the current approaches used by non-formal training providers as preparation for the in-depth interviews but also for preparation of the tailor made marketing strategy for each of the non-formal training providers individually.

Qualitative Research

Study design

The qualitative in-depth interview guide was designed to help identify current marketing, innovation; outreach and communication strategies used by non-formal training providers with the aim to help understand and identify best practices used but also understand needs for further development in this regard, and then later provide tailored support to improve marketing efforts by non-formal training providers.

Development of the discussion guide

The discussion guide was developed based on the terms of reference and in close consultation and was approved before the fieldwork by the EYE project team. The guide covered the following topics

In-depth interview discussion guide with non-formal training providers

1. Demographics of the training institution
2. History of the training institution
3. Questions about the 4 P's
4. Certification and Accreditation
5. Marketing efforts
6. Marketing channels
7. Marketing budget
8. Socially excluded groups initiatives
9. Trainers
10. Customer satisfaction surveys/Tracer study
11. Future plans

Target population

The in-depth interviews were conducted with partners of the Eye project, but also with non-partners of the project, in order to give the opportunity for support also to the non-partners, and to examine the support given by EYE project

Sample

In total eight stakeholders participated in the qualitative in-depth interviews for the research project. Out of those, four were conducted with Eye partners, and four interviews were conducted with Non EYE Partners.

This is an initial baseline survey and larger surveys can be performed in the future, but for the purpose of this survey the eight non-formal training providers were specifically chosen as a representation of the sector and serve to cover a variety of fields and different regions.



Main findings of in-depth interviews with non-formal training providers

Non-formal training providers of interest to this study are fairly newly established as training institutions. In half of the cases they were established as part of the mother company that was working in the field and they decided to teach students to recruit as potential employees in several instances, and in other cases they were founded by professionals of the field that saw a need and opportunity to equip students with specific practical knowledge and expertise.

More than half of the non-formal training providers of interest have only one-two employees that are trying to develop the company. They receive help by the mother companies, or friends but not in all cases. Maximum number of administrative staff by a training institution is five, whereas in terms of trainers, they are mainly contract employees, and the number depends on the trainings that they offer.

When analysing the marketing mix, the popular four P's of Harvard Professor Neil Borden, we see that usually not all aspects are taken into consideration by the non-formal training providers. Most have a good product, but because they are fairly new, they focus on the infrastructure more and don't dedicate enough funds for marketing, but also building internal capacities. There is also a lot of room to improve in terms of Pricing.



Product

All of the non-formal training providers are doing well on the product-trainings that they offer. They continuously try to update the curriculum, especially those in the IT sector. One company is using international curriculum adopted from European non-formal training providers, and is marketing that to its advantage and all other companies expect those in the IT sector got accreditation or are in the process of getting accreditation for specific trainings that they offer.



Place

The non-formal training providers have a good location, and don't face issues with that, except one that is planning to reallocate to a more central location. Most of the training providers are in urban areas, and they claim that students already live in the areas where they are located. Those that are in rural areas, claim that public transport is present and frequent.

One non-formal training provider mentioned that they also offer online classes, for those that are unable to travel and attend, but this option also opened doors to Albanian speaking students from all over the world to attend their trainings, and they already have students from Albania attending their trainings.

Nevertheless, none of the non-formal training providers have gone a long way in increasing number of students from rural areas, or adapting their specific needs, they believe that by targeting everyone, they are including everyone.



Promotion

All non-formal training providers highlighted that they have capacities to accommodate and train more students, but they lack the knowledge and funds to invest in promotion in order to reach out to new potential students.

All non-formal training providers claimed that their biggest plan of development is related to promotion, they face issues here because of lack of staff, knowledge and resources.

They believe that by promoting they can get more students, thus increase their income.

The non-formal training providers each and every one of them have a great competitive advantage, like their specific curriculum, trainers, and long years of expertise in the field and so on, but not all of them market it well or use it to their advantage to increase number of incoming students.



Price

Majority of non-formal training provider's part of this study declared that they face many issues with pricing, because of non-serious non-formal training providers that offer cheap prices, and are not focused on quality. Pricing is second biggest issue after Promotion.

It was also mentioned that many free trainings were offered (with the help of funds from international organizations), especially in the IT sector, which then resulted in a drop of interest of students for the non-formal training providers of interest, since they all offer programs with a specific fee. A couple of them are participating in programs where fees are reimbursed by donors, and students attend for free.

Two non-formal training providers mentioned that the fee that students are willing to pay does not match the fee that non-formal training providers can offer, one company after operating for a while understood that the fee that they are charging barely covers the overhead cost and the cost of the trainers.

It was also mentioned that interest is usually higher by students in the beginning, by not many end up starting the trainings, and even a smaller number finishes the training until the end, and they are not sure why that is happening.

If we look further, and expand the four P's to 7 P's and look at the people, this study reveals that the non-formal training providers do not understand their people very well, they did not invest much in that part as a result they do not have a defined target group they try to reach, and not a specific target group per course/module.

Many of the non-formal training providers do not have a **specific target market** in mind, even when they market, they do not market to a specific target market, and they rather aim for informing the general public. This was specifically the case with non-formal training providers offering different courses in different sectors.

Regarding **social excluded groups**, the training centres have no specific plan to reach out to them, but also to accommodate to train them. By targeting everyone, they believe that they are not excluding anyone. There is a big room for improvement here. Only one out of eight non-formal training providers has partnered with NGO's and State institutions to offer trainings for socially excluded groups like women from difficult backgrounds and children without families.



Employer and training centres cooperation



There is a big opportunity that needs to be developed, which is the connection of the students with the employers. The research reveals that training providers claimed that the trainings are being paid by the students themselves, however there are many benefits for the employers if they take on the costs of the trainings of the students and employ, in one case this is the reason why training centre was established, but now it accepts all students. One non-formal training provider has a specific program, where the students pay the training, but when they get employed the training providers pays back the investment to the student and training provider. The training provider claimed to report positive results with this approach.

Marketing strategy

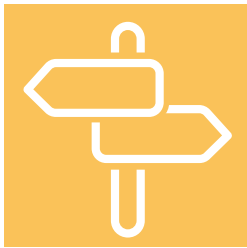


The vast majority of training providers do not have a marketing strategy in place. They do not have planned expenditures, and they do not have a dedicated marketing person, or the persons dealing with marketing lacks adequate knowledge, according to them.

All of the non-formal training providers are advertising their training on social media only during the time when they are enrolling new students for a specific course or training. The advertising is not persistent and is merely focused on acquisition of new students, sometimes without even making use of their competitive advantage properly. They do not work towards building a brand in their marketing efforts, and do not have in mind on building up a brand as a non-formal training provider.

Half of the non-formal training providers claim that they do client satisfaction questionnaire, however they do not seem to analyse them thoroughly, and build up actions upon them.

Whereas in terms of tracing their ex-students, majority of them do not do any tracer studies to understand the impact of their training in their career.



Difference between partners of the EYE program and non-partners

The research reveals that support of an international organization like the support from the EYE project that four non-formal training providers have benefited from is closely linked with the overall motivation and performance of the training provider. There is one company that used the support well and is still cooperating with the digital marketing agency even after the support from the EYE project ended, whereas there is one company that after the supporting period ended, they are struggling with gaining new students, and don't deem it appropriate or have not set aside sufficient funds to continue working with the digital marketing agency for the future. Whereas on the other hand there are two training providers that are doing well in terms of recruiting students even without the support from a project like the EYE project, as observed in this research project.

Quantitative Online Survey

Study design

The quantitative questionnaire with beneficiaries was designed to help identify how students receive the information about the trainings, which is used then later to provide tailored support to improve marketing efforts by non-formal training providers.

The quantitative survey was sent out via email to the non-formal training providers, who then are forwarding the link via email and other means of communication, like Viber to its former students.

The questionnaire was drafted in English language, and was translated in Albanian and Serbian language. It was made available in all official languages in Kosovo, as a means to have an easy reach and bigger response rate.

Target population

The quantitative questionnaire with beneficiaries was conducted with former students of the non-formal training providers of interest for this study.

Sample

The sample of the quantitative questionnaire with beneficiaries was 62 respondents.

Development of the Questionnaire

The questionnaire was developed in close consultation and was approved before the fieldwork by the EYE project team. The questionnaire for the online quantitative survey was compiled of the following sections:

Quantitative questionnaire with beneficiaries

1. How they were informed about the training
2. How they prefer to get information about training
3. Net Promoter score
4. Demographics of the beneficiaries (students)

Data processing and analysis

The data were gathered during September 2022 via Survey Monkey platform and were checked and validated during the gathering phase and the analysis of the data.

Data analysis was performed in SPSS for Windows 22 software program, where tabular reports were produced, which were used for further analysis and interpretation. Apart from SPSS, Microsoft Excel 2013 was also used for performing specific analysis, as well as for creating charts and tables.

The data is the property of the contractor, i.e. is the EYE Project. At the completion of the study, the final data set will be handed over to the EYE Project team

Ethical considerations

Participation in the study was voluntary. At the beginning of the questionnaire participants were informed that a) their participation in voluntary, b) they can withdraw from participation at any time, c) non-participation will not have any negative effects. Participants were also informed how the data will be used and that confidentiality is ensured as no names or identifying personal information will be linked to the answers they provide.

Key Challenges

One of the key challenges in the study was the collection of the data. During the time the study was performed training centres were on the summer holidays so most of the stakeholders were on holidays and it was difficult to contact them, it needed persistence and several attempts to arrange the interviews.

Another challenge was gathering the data from the beneficiaries.

The reasons why it was challenging were two folds. Firstly a lot of non-formal training providers do not keep in touch with the students after they finish their programs, so we have low response from this group, and the other reason is that the non-partners but also one of the partners of the Eye project simply did not want their ex-students to partake in this study.

Findings of the quantitative survey with beneficiaries

With the purpose to help us identify how students received the information about the trainings, a questionnaire was sent to beneficiaries of the trainings of the non-formal training provider's subject of this study.

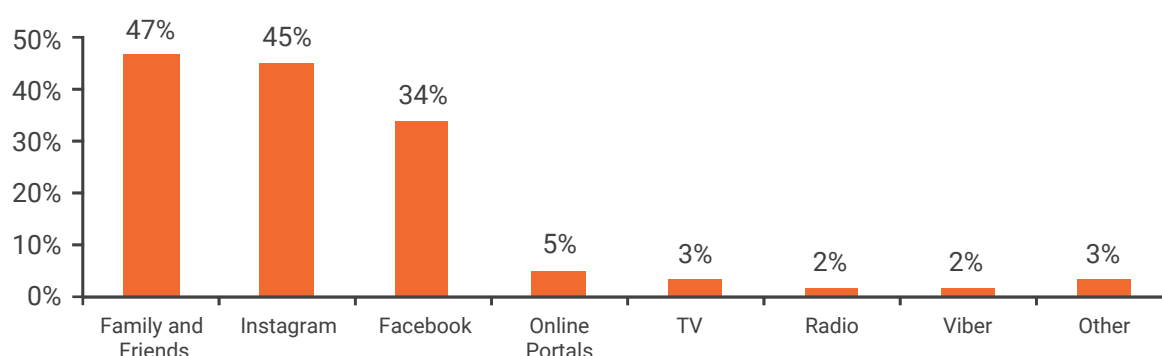
Where did students hear about the program

As for how the participants heard about the training program, students mentioned several reasons, with family and friends 47% and Instagram being the most mentioned ones 45%, closely followed by Facebook, 34% of the students.

Non-formal training providers have also mentioned that this it is very common that friends come together to the training. It is also common that family members, friends and relatives of students that previously attended the training come to the new trainings. So a good experience in the training is key and is well discussed amongst family and friends.

Other ways like online portals and traditional media such as TV and Radio were mentioned only a couple of times, as the non-formal training providers don't invest much in these platforms.

Where did you hear about the training program that you followed?



Graph 2: Institution where beneficiaries finished the training

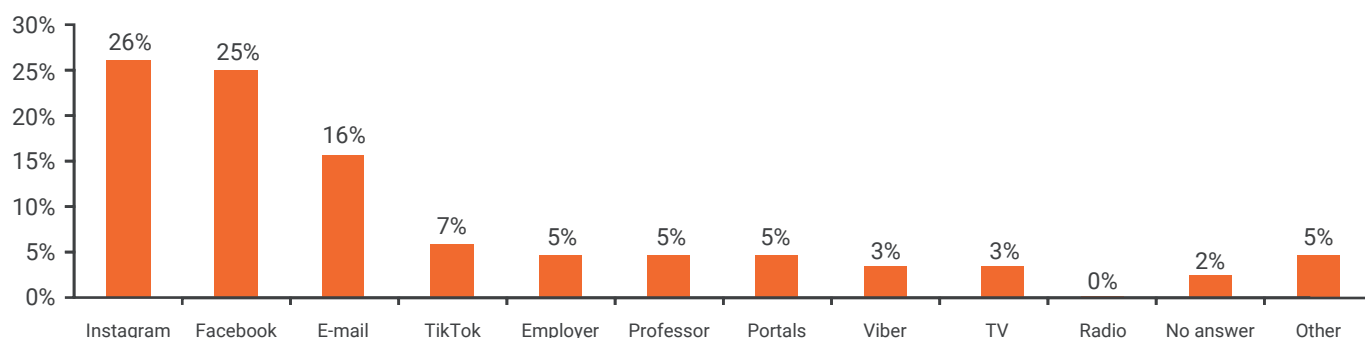
Where did you hear about the training program that you followed?		N	%
	Family and Friends	29	47%
	Instagram	28	45%
	Facebook	21	34%
	Online Portals	3	5%
	TV	2	3%
	Radio	1	2%
	Viber	1	2%
	Other	2	3%

Table 2: Information about the training program with N and %

Preferred method of communication

Whereas in terms of how they would like to be informed about training opportunities, Instagram 26% and Facebook 25% remains on top, reasons are similar to the ones how they got informed. They would also like to be informed by email 16%. Tiktok was also motioned as a promising platform by 7% of the students, mainly younger generations. Other options like to read about the trainings on online portals 5%. Getting informed by employers and professors 5% was mentioned by only a couple of students, and last was Viber and TV 3%.

What is the best way that training centres can communicate their training opportunities to you?



Graph 3: Preferred method of communication













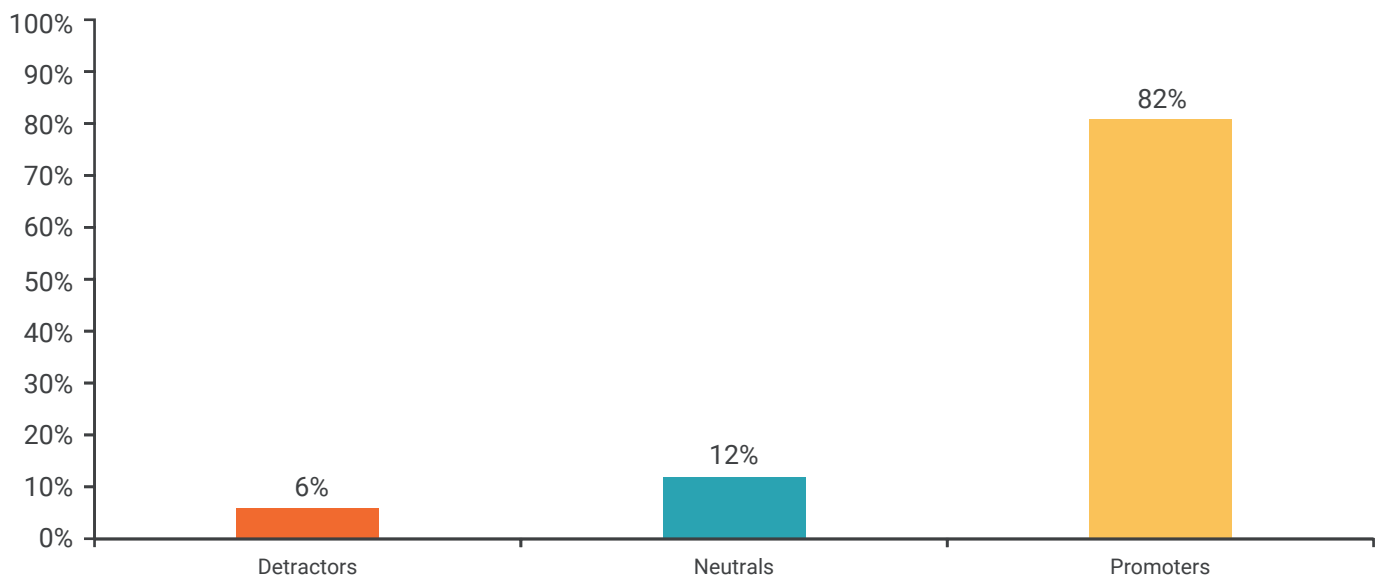
What is the best way that training centres can communicate their training opportunities to you?		N	%
	Instagram	16	26%
	Facebook	15	25%
	E-mail	10	16%
	TikTok	4	7%
	Employer	3	5%
	Professor	3	5%
	Portals	3	5%
	Viber	2	3%
	TV	2	3%
	Radio	0	0%
	No answer	1	2%
	Other	3	5%

Table 3: Preferred method of communication with N and %

Net Promoter Score

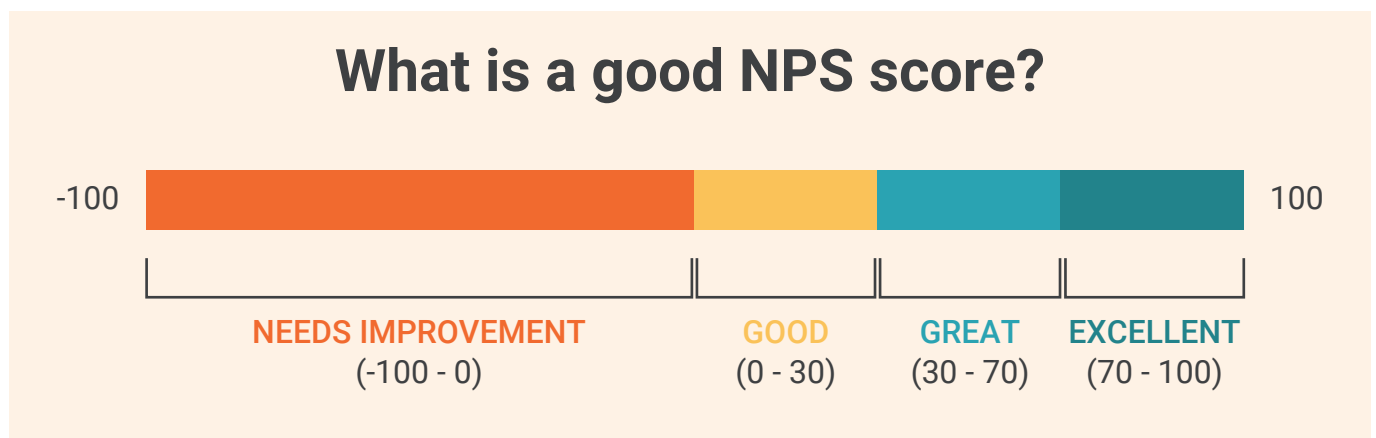
Net Promoter Score for Non-formal training providers is 74 (Positive).

This is an exceptionally high evaluation, where 82% of the participants were very satisfied with the trainings, and are expected to promote it to future potential students, only 6% are detractors, meaning that they were not satisfied with the trainings, and can talk negative about the experience, and 12% have a neutral opinion about the training that they followed, and will not talk much about it.



Graph 4: Net Promoter score

NPS Score – Explanations



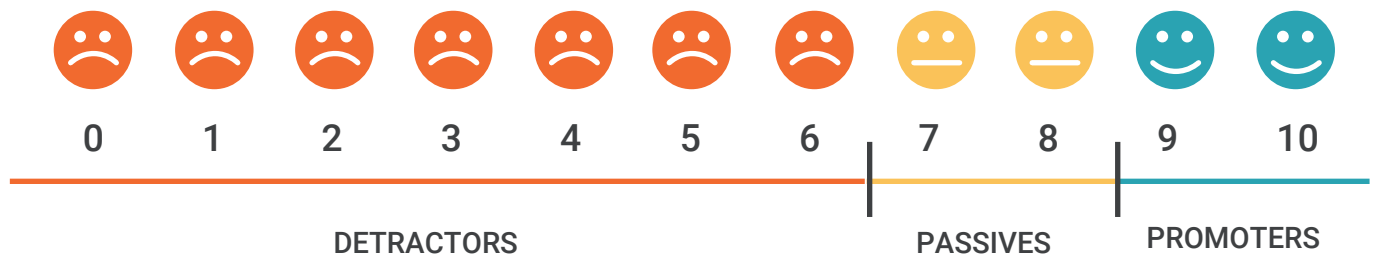
On a scale of 0 to 10, how likely are you to recommend the training that you followed to a friend or colleague, where 0 means do not recommend, and 10 means recommend

Promoters: Customers who answer the question with 9-10

Passives: Customers who answer the question with 7-8

Detractors: Customers who answer the question with 0-6

To calculate Net Promoter Score, subtract the percentage of detractors (customers who would not recommend you) from the percentage of promoters (customers who would recommend you).
NPS Score can vary from -100 to 100.



$$\text{😊 \%} - \text{😞 \%} = \text{NET PROMOTER SCORE}$$

A score between 0 and 30 is a good range to be in, however, there is still room for progress.

If your NPS is higher than 30 that would indicate that your company is doing great and has far more happy customers than unhappy ones.

A NPS over 70 means your customers love you and your company is generating a lot of positive word-of-mouth from their referrals. The higher your NPS is, the more likely it is that your customer referrals will convert into new leads and more revenue for your company.

Generally, if Net Promoter Score (NPS) is below 0, that is an indicator that your company needs to start understanding and improving your customer satisfaction levels.

Demographic questions

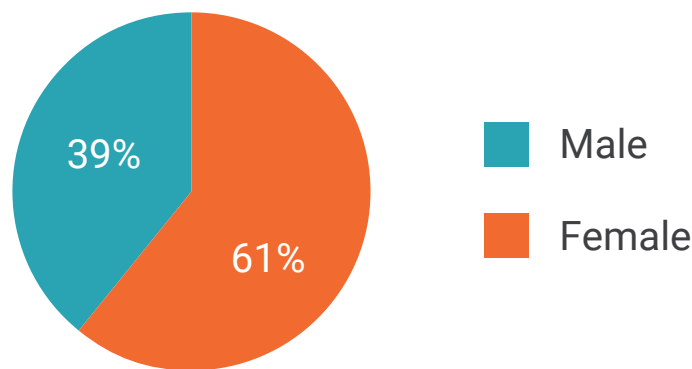
Age of respondents

Average age of respondents is 26. Median age is 24.

Youngest student participating in the research study is 16 years old, whereas oldest 51 years old.

Gender of respondents

Respondents to the study were 61% female, and 39% male. Non-formal training providers providing trainings in apparel, fashion, hairdressing, but also surprisingly woodwork mentioned that they have more female compare to male students. However this is not the same in all sectors, companies offering trainings in the IT sector, 3/4th of their students are male.



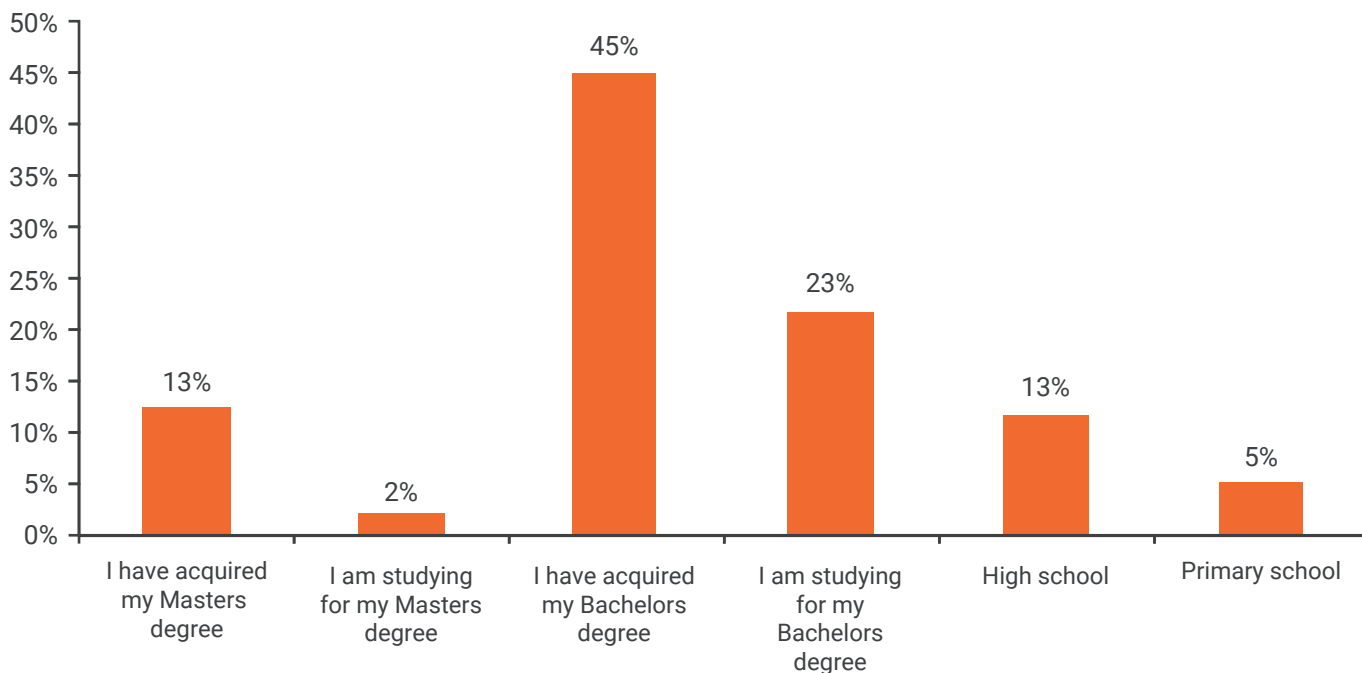
Graph 5: Gender of the respondent

What is your gender?	N	%
Male	24	39%
Female	38	61%

Table 4: Gender of the respondent with N and %

Education of the respondents

Level of education of the respondents is quite diverse, where almost half of them 45% have acquired their bachelor degree, and almost a quarter 23% of them are working towards their bachelor's degree. There are also students that finished their master studies 13% of them, and 2% that are currently in their master studies that simultaneously followed a training program. Some 13% have finished their high school, and 5% finished only their primary school.



Graph 6: Education of the respondent

<i>What is your last obtained degree?</i>	N	%
I have acquired my Master's degree	8	13%
I am studying for my Master's degree	1	2%
I have acquired my Bachelor's degree	28	45%
I am studying for my Bachelor's degree	14	23%
High school	8	13%
Primary school	3	5%

Table 5: Gender of the respondent with N and %

Location of the respondents

Most of the participants are currently living in Peja, Prishtina and Graçanica. Whereas there are participants in the trainings from all over Kosovo.

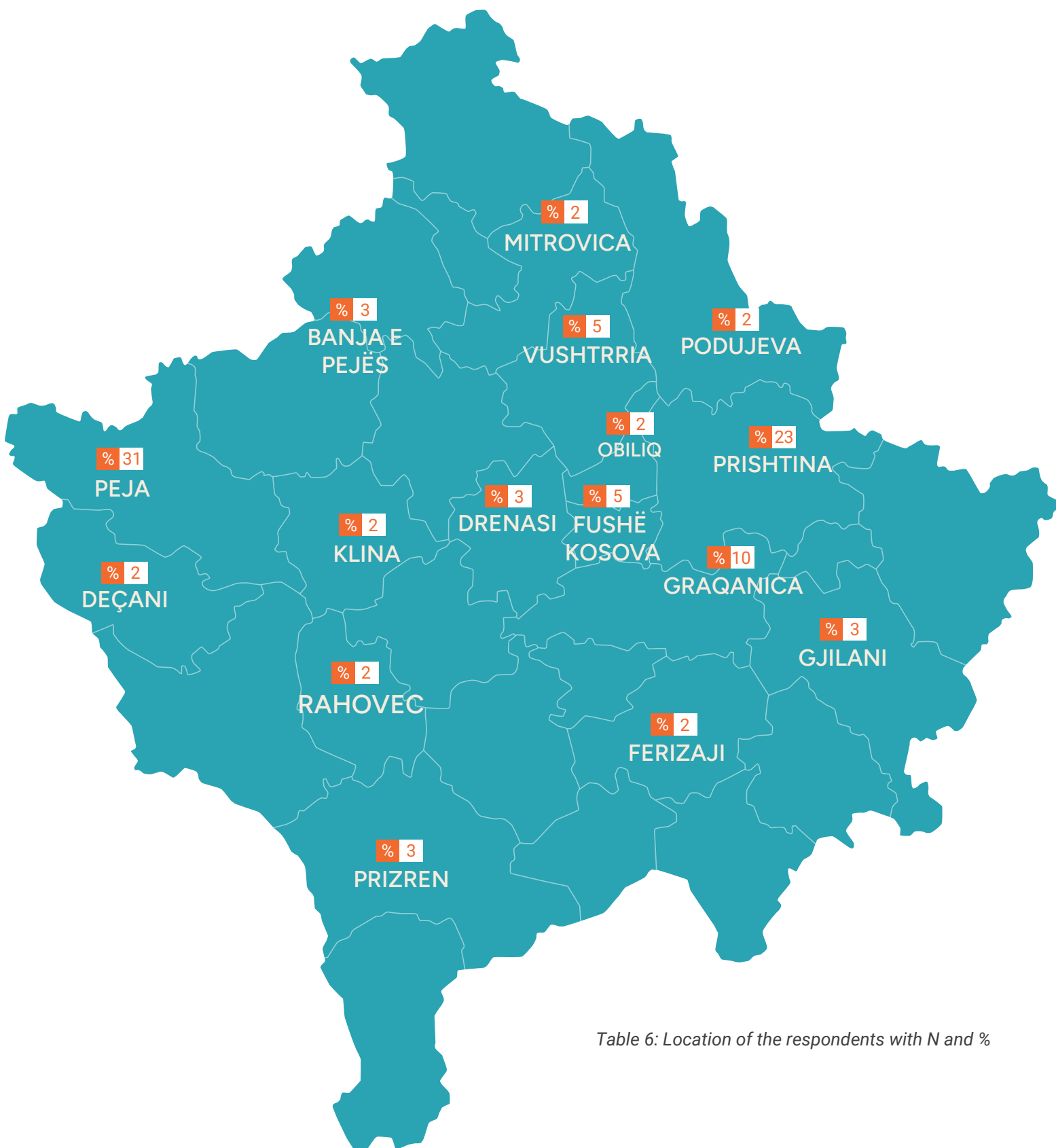


Table 6: Location of the respondents with N and %

Recommendations for non-formal training providers

1.

Analyse, adapt, use and build upon the Tailor-made Marketing Strategies

2.

Focus on building internal capacities

3.

Orient funds towards marketing, not only on infrastructure

4.

Keep in mind that a good experience in the training is key, it is well discussed amongst family and friends. Make use of that via referral programs, or free sit in participations in class

5.

Look at the opportunity to offer online trainings, it will open up new opportunities and availability for more students

6.

Work in including socially excluded groups, by offering scholarships but most importantly by accommodating their needs in terms of location and specific curricula

Annex 1: In-depth interview discussion guide

In-depth Interview Guide with Non-formal training providers

Research on marketing, innovation, outreach and communication strategy.

Enhancing Youth Employment (EYE)

Project of Swiss Agency for Development and Cooperation (SDC)

Implemented by HELVETAS Swiss Intercooperation & MDA

August-September 2022

Introduction

I am Arber Hajrizaj, an independent consultant and was hired to do research on marketing, innovation, outreach and communication strategy with different non-formal training providers.

Together with the EYE team we have prepared some questions which will help us identify current marketing, innovation, outreach and communication strategies used by non-formal training providers with the aim to help us understand and identify best practices used but also understand needs for further development in this regard, and then later provide tailored support to improve marketing efforts by non-formal training providers.

The interview will last about 60 minutes, and your information will remain anonymous. Let me highlight that a) your participation is voluntary, b) you can withdraw from participation at any time, c) non-participation will not have any negative effects in relation with the donor.

The report is used for internal purposes to understand and identify best practices and needs for development related to marketing.

For any information related to this research you can reach us at arber.hajrizaj@gmail.com, or the intervention manager for the Eye Project Fatlinda.Mujko@helvetas.org

Respondent Demographics

Name: _____

Position: _____

Company: _____

Date: _____

Demographics

1. How many people are employed at your company?

Operational:

Trainers:

2. What year was the company established?

Year:

Interview questions

General company information

1. Can you tell me a bit about your company?

2. Who do you consider your main target market?

3. Who is currently purchasing your products or services?

4. What about competition, what do you consider that you offer more than them? Your competitive advantage?

Product

5. What courses do you offer?

6. Which are the main successful ones? Why?

Price

7. What is your current average price for training?

8. How long does a training usually last?

Certification and accreditation

9. Do you offer any certification?

10. Are your trainings accredited?

Promotion

11. What is your current marketing strategy for your company? What about reaching out to potential trainees? Can you be specific?

12. Where is your focus? Social media, discounts?

13. What is your most successful marketing effort?

14. Which of the following marketing channels do you have/ Use?

- a. Website
- b. Email
- c. Facebook
- d. Instagram
- e. LinkedIn
- f. TV ads
- g. Radio ad
- h. Other:

15. What about social excluded groups, like women, people in rural areas and minorities? Any specific plan in reaching them? (Note to consultant: Focus on what they are currently doing for women and minorities example are they offering training profiles that target these 2 groups. If yes which are the profiles. If no, do they have plans to develop new training packages or improve their current courses to suit women and minorities in the future?)

16. Can you describe, how does an individual purchase a training at your company? What are the payment options? Do they pay themselves, or employer? What is the percentage?

Themselves: ___ %

Employer ___%

17. How much percent of your spending are dedicated to marketing?

18. Do you have a marketing dedicated staff? Why, what are their responsibilities or duties? If no, who does marketing duties?

19. Who are your trainers? What background do they have? How do you choose them? Do you consider them as influencers? Do they help you in marketing the trainings, and outreach offers?

20. Do you perform any surveys to understand satisfaction of trainees with trainings you offer and the impact the training they followed had on their professional career?

Place

21. Where are you currently operating? Are you looking to expand?

Need for support

22. What is your development plan? At what percent are you looking to increase the number of students? Are you planning to offer any new courses?

23. What upgrades could be made to your services to make it better?

Annex 2: Quantitative questionnaire with beneficiaries

Research on marketing, innovation, outreach and communication strategy of non-formal training providers

Introduction

I am Arber Hajrizaj, an independent consultant and I am writing to you to ask some questions to help us understand marketing of the non-formal training provider of the training course that you have undergone lately, or started following.

The questionnaire has only 4 questions (plus 4 demographic questions) and will take only 3 minutes of your time, and your information will remain anonymous, and will be used to support non-formal training providers with their marketing efforts.

For any information related to this research you can reach us at arber.hajrizaj@gmail.com, or the intervention manager for the EYE Project Fatlinda.Mujko@helvetas.org or the non-formal training provider.

Questions

1. At which institution did you follow training? (only one choice)

- Company 1
- Company 2
- Company 3
- Company 4

2. Where did you hear about the training program that you followed? (multiple choice)

- Facebook
- Instagram
- From friends/family/relatives
- TV
- Radio
- Portals like Telegrafi, indksonline etc
- Other (please define)_____

3. What is the best way that training centres can communicate their training opportunities to you? (only one choice)



4. On a scale of 0 to 10, how likely are you to recommend the training that you followed to a friend or colleague, where 0 means do not recommend, and 10 means recommend?

- 0 do not recommend
- 1
- 2
- 3
- 4
- 4
- 5
- 6
- 7
- 8
- 9
- 10 recommend

Demographics

5. What is your age? ____

6. What is your gender?

- a. Male
- b. Female

7. What is your last obtained degree?

- a. I have acquired my Masters degree
- b. I am studying for my Masters degree
- c. I have acquired my Bachelors degree
- d. I am studying for my Bachelors degree
- e. High school
- f. Primary school

8. Where are you from?

