

The mtmconsulting School Marketing Survey 2009

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mtmSTRATEGY

mtmMARKETING

mtmFUNDRAISING

mtmRESEARCH



mtmCOMMUNICATIONS

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The **mtm**consulting School Marketing Survey 2009

The first **mtm**consulting School Marketing Survey was undertaken during March 2009, using the online survey facilities used for undertaking research for client schools, associations, companies and organisations.

A total of 200 responses were received from schools. In the range of size and type, respondent schools represented a characteristic cross-section of the UK independent sector. The results give a valuable snapshot of the state of independent school marketing at a critical stage for all schools, with the effects of a deep recession beginning to be felt.

Headline results

- ◆ Responses came from a broadly representative sample of independent schools, day, boarding, single-sex and co-ed, with a slight bias towards larger schools.
- ◆ Half the schools spend 1% or less of annual fee turnover on marketing activities. Overall, the estimated average spend per school was about 1.1% of turnover.
- ◆ Larger schools appear to spend proportionately less of their turnover on marketing.
- ◆ Even in today's highly competitive environment, one school in ten has no member of staff responsible for marketing.
- ◆ Four schools out of ten (39%) have a full-time member of staff responsible for marketing.
- ◆ Approximately a quarter of schools had an integrated marketing and admissions department, but six out of ten schools still handle admissions separately from marketing
- ◆ Only four out of ten (39%) of those responsible for marketing were members of their school's Senior Management Team.
- ◆ Four schools out of five (79%) said they had a marketing plan; 21% did not.
- ◆ Just over half (52%) had no measurable targets set within the marketing plan.
- ◆ Four schools out of five (82%) used the number of pupils admitted as a measure of the success of their marketing.

- ◆ Almost all schools said they had conducted some form of research amongst parents, although 4% said they had never done so, and 11% had not done so within the past three years.
- ◆ One school in five had not conducted any form of catchment area or market potential research. A further 29% said they had conducted catchment area research themselves,
- ◆ **mtm**consulting's Mandarin service was used by 18% of respondents, twice as many as had used the ISC Catchment Area Analysis service (9%) and more than three times as many (5%) as had purchased bureau services direct from CACI or Experian.
- ◆ Schools update their websites more frequently than their prospectuses. Just under one-third of the respondents (31%) had renewed their prospectus within the last year, while nearly half (49%) had updated their websites in the same period
- ◆ More than a third of schools (36%) reported that they now received half or more of their enquiries via the school's website
- ◆ A quarter of schools did not know what proportion of their enquiries came via the website.
- ◆ Asked to identify the three greatest marketing challenges for their schools over the next 12 months, more than half identified maintaining the school roll at its present level.
- ◆ Significantly more schools identified the need to recruit more boarders from within the UK (24%) than to further increase overseas recruitment (11%).

The sample

Responses came from a broadly representative sample of independent schools. The tables below show the breakdown of the sample by Association membership, size and type of school and whether day or boarding.

Table 1 Sample composition

Association membership	Survey%	ISC%
GSA	17	15
HMC	27	20
IAPS	31	40
ISA	11	20
SHMIS	11	5
None	3	0

Size of school	Survey%	ISC%
<100	0	4
100-250	21	32
251-500	42	36
501-750	15	14
751-1000	14	8
>1000	9	4

Type of school	Survey%	ISC%
Boys	10	10
Girls	22	17
Co-ed	68	71

Day/boarding	Survey%	ISC%
Day only	48	61
Day/boarding	51	38
Boarding only	1	1.1

Compared with the profile of the independent sector, as represented by ISC membership, the survey sample had a slightly higher proportion of HMC and GSA schools (44%; ISC 35%) and proportionately smaller representation of IAPS, ISA and SHMIS schools (53%; ISC 65%). 3% came from non-ISC schools. The sample profile of single-sex/co-educational schools was very similar to the ISC profile. There was a higher proportion of schools of over 500 pupils (38%; ISC 26%) and a smaller proportion of schools under 250 pupils (21%; ISC 36%). There was a slight bias towards mixed day-boarding schools with a lower proportion of day-only schools (48%; ISC 61%).

86% of the schools were charitable, with 9% describing themselves as proprietorial and 5% as "other".

Responsibility of respondent

Nearly four out of ten responses (38%) came from members of staff with responsibility for marketing. Of the remainder approximately a quarter each were submitted by heads and by bursars and some 10% by admissions/registry staff.

Table 2: Responsibility of respondent ¹

1. Post	Frequency	Percentage	Adj.percentage
Head	48	24%	24%
Bursar	47	23%	23%
Registrar / Admissions	21	10%	10%
Marketing	77	38%	38%
Administrative / secretarial	3	1%	1%
Teacher (marketing responsibilities)	5	2%	2%
Total	201.00	99.01	100.00

¹ Note on percentages: Throughout this report, tables refer to Percentage and 'Adjusted Percentage'. Not all respondents answered all questions. 'Percentage' figures show the number of respondents as a percentage of the total number of respondents to the survey. 'Adjusted percentages' show the number of respondents as a percentage of the number of respondents who answered that particular question.

Spending on marketing

What percentage of fee turnover does your school spend on marketing activities (excluding staffing costs)?

Most (90%) respondents answered this question. Just over half the respondents (52%) spend 1% or less of annual fee turnover on marketing activities, with about a third (34%) spending between 1-2%. Overall, the estimated average spend per school was about 1.1% of turnover.

Table 3: Marketing spend as percentage of turnover

3. Marketing spend %	Frequency	Percentage	Adj. percentage
Less than 0.5%	39	20%	22%
0.5 to 1%	54	27%	30%
1 to 1.5%	29	15%	16%
1.5 to 2%	33	17%	18%
2 to 2.5%	8	4%	4%
2.5 to 3%	3	2%	2%
3 to 3.5%	4	2%	2%
3.5 to 4%	3	2%	2%
4 to 4.5%	3	2%	2%
4.5 to 5%	3	2%	2%
More than 5%	2	1%	1%
Total	181.00	90.50	100.00

Larger schools appear to spend proportionately less of their turnover on marketing activities, as shown in the following table. 94% of schools with more than 1000 pupils spend 2% or less of their turnover on marketing, compared with 74% of schools with 250 pupils or less and 84% of schools between 251 and 500 pupils.

Table 4: Marketing spend by size of school

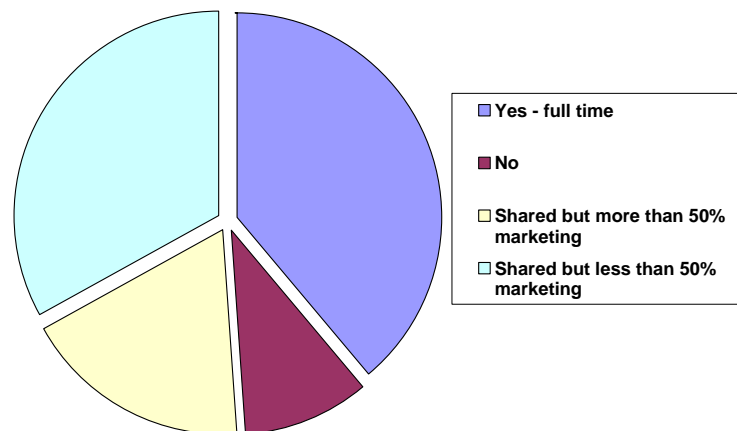
Proportion of turnover	100-250 pupils	251-500 pupils	501-750 pupils	751-1000 pupils	1000+ pupils
Up to 1%	54%	42%	50%	64%	69%
1% - 2%	20%	42%	40%	22%	25%

This may reflect the fact that there is a fairly limited range of activities on which most schools spend their marketing budget (prospectus, website, advertising, etc); and that these represent relatively fixed costs, whatever the size of the school. But it may also reflect a degree of complacency on the part of the largest schools about the security of dominant brands within their local and regional markets.

The staffing of marketing

a) Staffing and organisation

Figure 5: Marketing staff

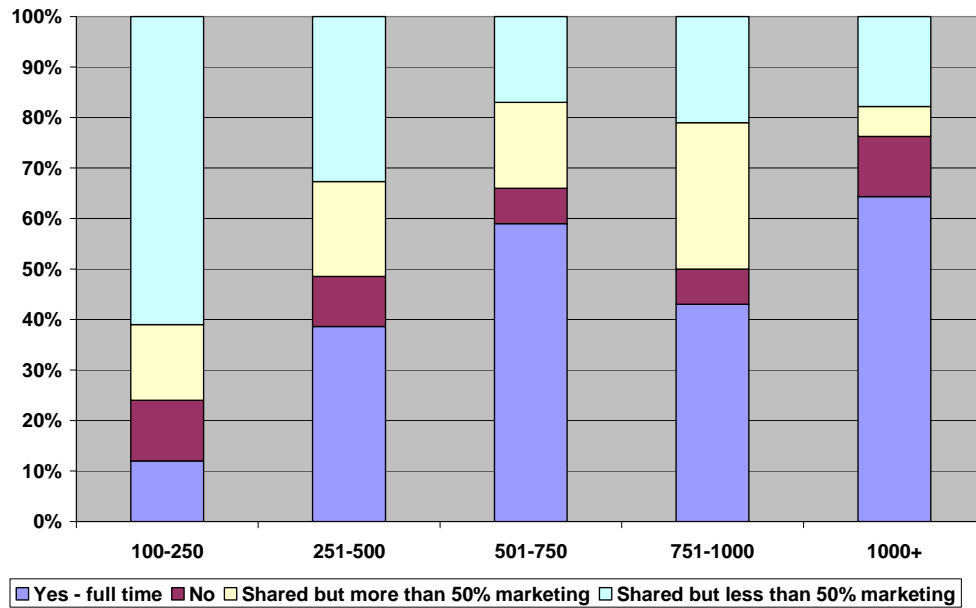


Perhaps the most surprising finding was that one school in ten, even in today's highly competitive environment, has no member of staff responsible for marketing, whether full- or part-time. Those schools with no marketing staff were spread across all types and sizes of school: 12% of each of the smallest and largest schools in the survey had no marketing staff; there were, however, higher proportions of Prep and Pre-Prep/Prep schools than of senior and all-through schools.

Four schools out of ten (39%) have a full-time member of staff responsible for marketing. The remainder (51%) have a member of staff responsible for marketing but sharing these responsibilities with other activities; of these about two-thirds spend less than half their time on marketing activities.

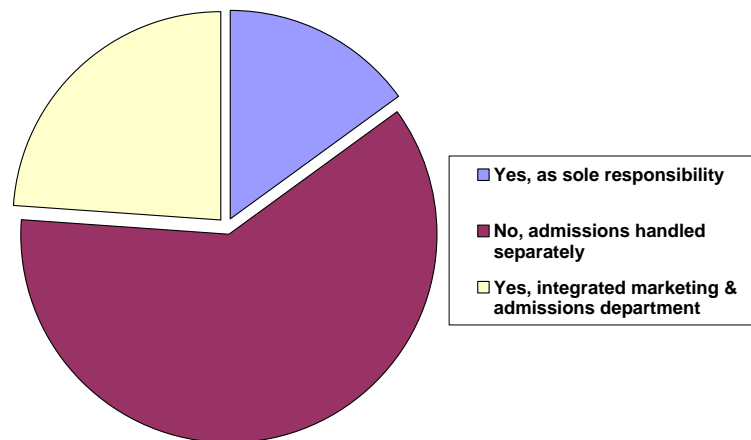
One-third of the schools (33%) relegated marketing responsibilities to less than half of the relevant member of staff's time. These "less-than-50%" appointments are disproportionately distributed amongst smaller schools, as shown in the tables below. 61% of the schools between 100-250 pupils have such appointments, compared with only 18% of the 1000+ plus pupil schools. Two-thirds of the prep schools and nearly six out of ten of the Pre-Prep/Prep schools had similar appointments.

Figure 6: Marketing staff (by type of school)



In 15% of schools, the same person was wholly responsible for both marketing and admissions, as shown in the table below. Approximately a quarter of schools had an integrated marketing and admissions department, but six out of ten schools have not progressed beyond the stage of handling admissions separately from marketing.

Figure 7: Marketing & admissions

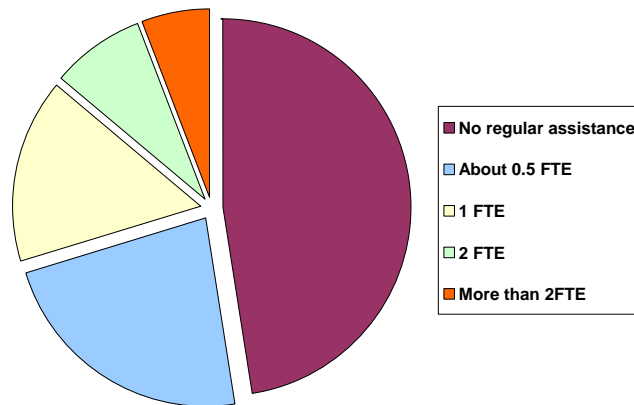


Integrated marketing and admissions departments were more frequent in senior schools, where approximately one-third of respondents had such a structure. Amongst prep schools, by contrast, about one-third of schools expected one person to handle both marketing and admissions alone.

Only four out of ten (39%) of those responsible for marketing were members of their school's Senior Management Team.

Nearly half (48%) had no regular staffing assistance in their marketing duties; others had assistance in proportions shown in the figure below.

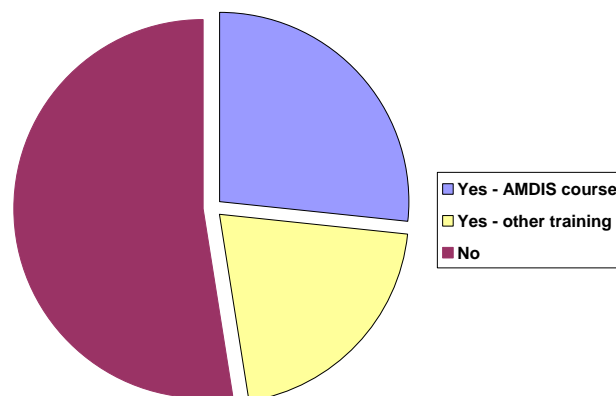
Figure 8: Assistance with marketing duties



b) Staff experience and training

Almost two-thirds (62%) of those employed to be responsible for marketing had either relevant professional qualifications or some prior experience of marketing.

Figure 9: Marketing training

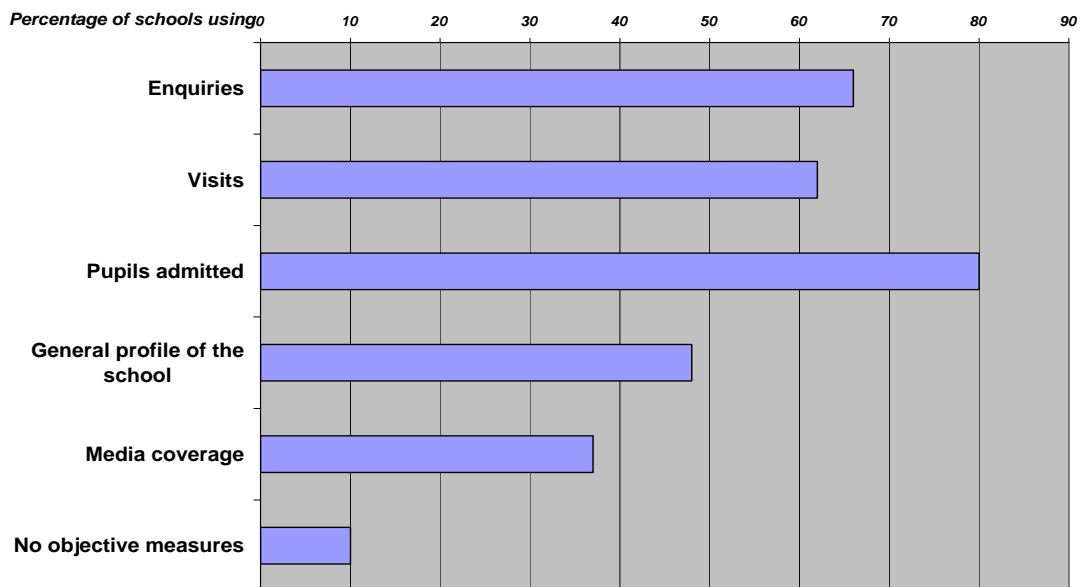


Just over half (53%) of school marketing staff had had no relevant professional training, while just over a quarter (27%) had attended AMDIS (Association for Marketing and Development in Independent Schools) courses and 21% had had other training.

Planning and execution of marketing

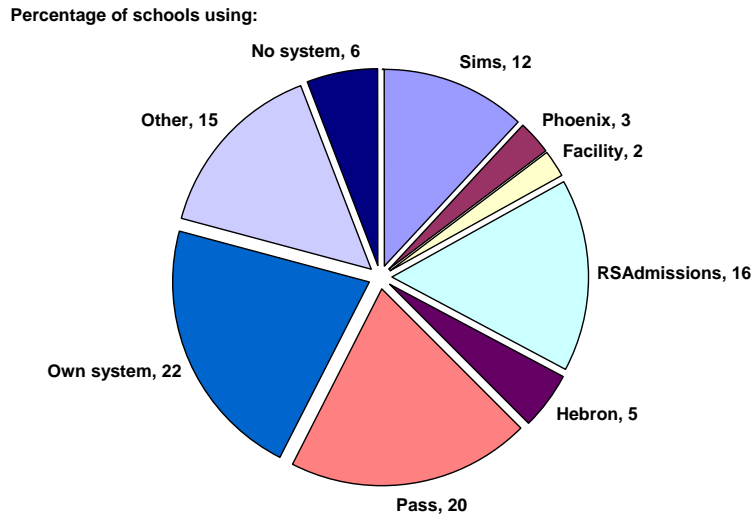
- ◆ Four schools out of five (79%) said they had a marketing plan: 21% did not.
- ◆ Of those schools with a marketing plan, just over half (52%) had no measurable targets set within the plan.
- ◆ Four schools out of five (82%) used the number of pupils admitted as a measure of the success of marketing activities, followed by numbers of enquiries received (66%) and visits (62%) by prospective parents. One school in ten, however, set no objective measures for the success of marketing.

Figure 10: Measures of marketing success



- ◆ The vast majority of schools (92%) said they had a system in place for following up parental enquiries. 8% did not.
- ◆ Only 6% of responding schools did not use a database system for recording enquiries from prospective parents. Of the systems used, 22% said they used a bespoke internally-designed system, 22% used Pass (WCBS) and 16% used RS Admissions.

Figure 13: Admissions databases

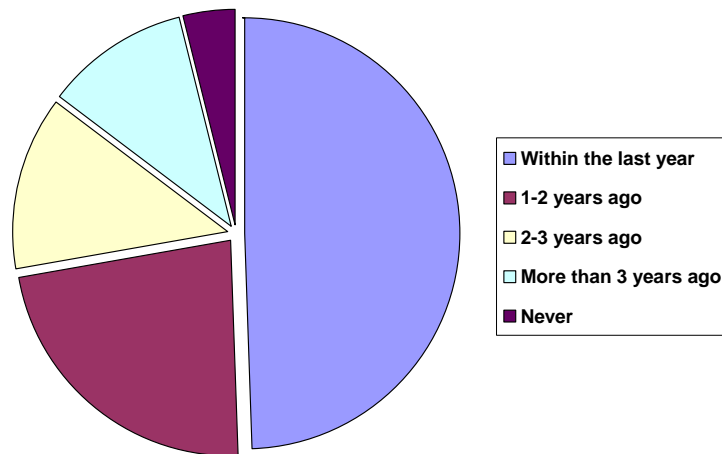


Research

Parental research

Almost all schools responding said they had conducted some form of research amongst parents, although 4% said they had never done so, and 11% had not done so within the past three years. Half (50%) had undertaken some form of parental research within the last year and nearly three-quarters (73%) within the last two years.

Figure 14: Parental research

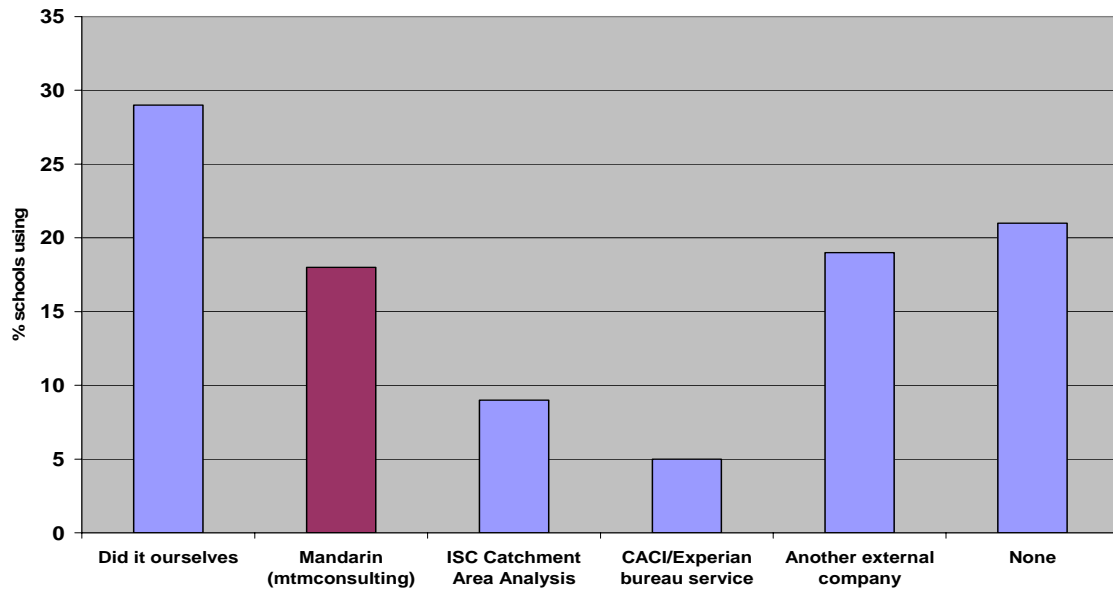


Catchment area research

One school in five amongst respondents (21%) had not conducted any form of catchment area or market potential research. A further 29% said they had conducted catchment area research themselves, which suggests a level of analysis in these schools some way below that provided by mtmconsulting, ISC and the bureau services of CACI and Experian. mtmconsulting's Mandarin service was used by 18% of respondents, twice as many as had used the ISC Catchment Area Analysis service (9%) and more than three times as many (5%) as had purchased bureau services direct from CACI or Experian.

Small schools (between 100 and 250 pupils) were the most likely not to have conducted market analyses (32%) or to have conducted such analyses themselves (44%).

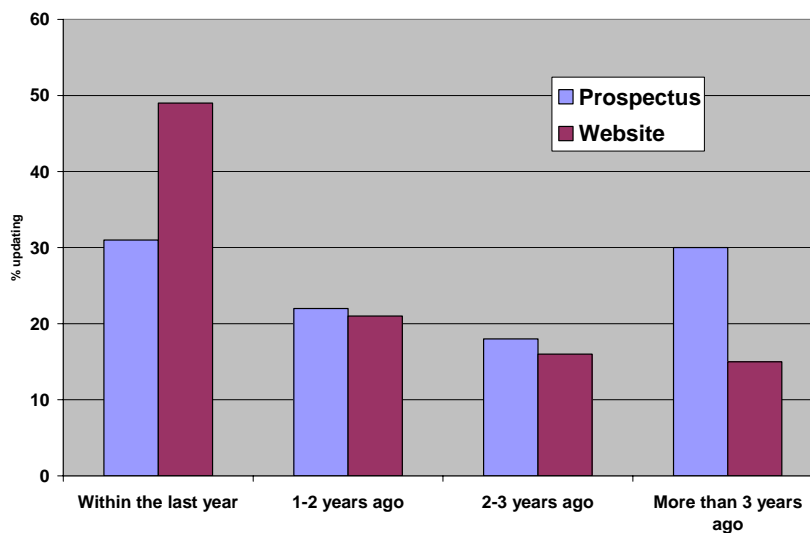
Figure 15: Catchment area research



Prospectuses and websites

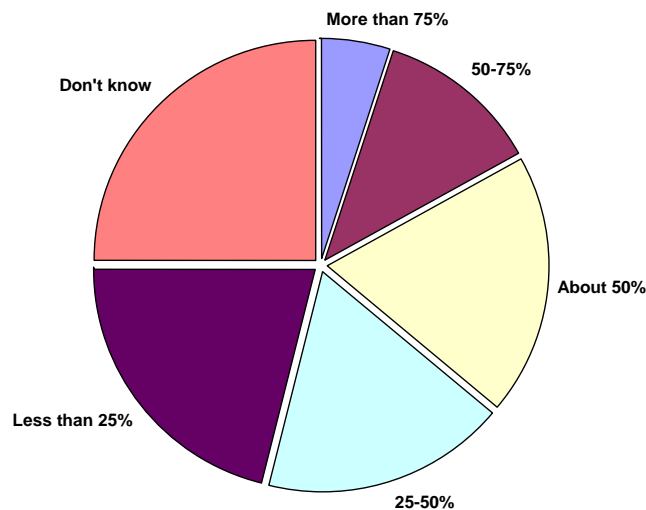
Schools update their websites more frequently than their prospectuses. Just under one-third of the respondents (31%) had renewed their prospectus within the last year, while nearly half (49%) had updated their websites in the same period. And while 30% had prospectuses more than three years old, only 15% had not updated their websites in the last three years.

Figure 16: Prospectus & website renewal



Reflecting up-to-date practice, almost all schools reported having content management systems (CMS) on their websites, allowing them to update pages themselves. Three-quarters (74%) reported that they had CMS on all website pages, while a further 21% had CMS on some pages. Only 6% had no CMS.

Figure 17: Enquiries via website

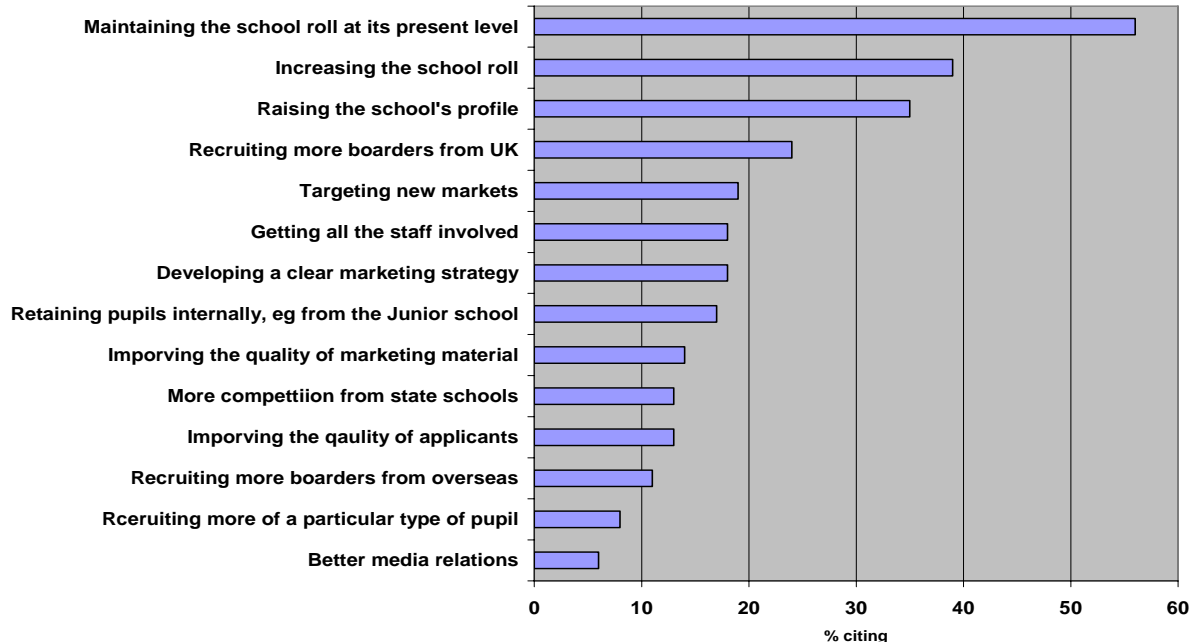


36% of schools reported that they now received half or more of their enquiries via the school's website. Only about one school in five (21%) reported that under 25% of their enquiries originated from the website. More worryingly, a quarter of schools did not know what proportion of their enquiries came via the website.

There were no great differences between types of schools in reporting enquiries via the website. Surprisingly more day schools (38%) fell into the group reporting half or more website-originated enquiries than mixed day and boarding schools (32%), although the two wholly boarding schools responding to the questionnaire reported that between 50 and 75% of their enquiries originated from their websites. Perhaps surprisingly, more Pre-Prep/Prep schools (44%) came into this category than senior schools (35%); this may reflect the greater facility with digital methods enjoyed by younger parents. In any case, it is very likely that these proportions will rise rapidly in the next few years.

Challenges

What do you think are the most pressing marketing challenges for your school over the next 12 months?



Asked to identify the three greatest marketing challenges for their schools over the next 12 months, most respondents reflected the current uncertainty arising from the economic situation. More (56%) identified maintaining the school roll at its present level than felt the need to increase the school roll (39%), perhaps reflecting the effects of the more benign recruitment conditions of recent years and the fact that many schools are at or close to capacity. But the priorities are clear.

More than a third (35%) saw raising the school's profile as one of their biggest challenges.

Significantly more identified the need to recruit more boarders from within the UK (24%) than to further increase overseas recruitment (11%).

Internal and organizational issues – getting all the staff involved (18%), developing a clear marketing strategy (18%) and internal retention of pupils (17%) – each concerned more than one in six respondents.

If you would like further information on how our online surveys could help your school, please contact us on 01502 722787 or office@mtmconsulting.co.uk

Appendix

The **mtm**consulting School Marketing Survey questionnaire

MTM Marketing Survey

In these challenging times, school marketing has never been more important. As part of our mission to assist schools with the implementation of the most effective and up-to-date research and marketing practice, this mtmconsulting survey aims to benchmark the current organisation of marketing and sales (i.e. admissions) in independent schools.

Please take a few minutes to complete this online survey - it should take less than five minutes in total. Your response will be treated in confidence and will not be communicated to any third party; it will be used only in the preparation of an aggregated report.

In return for completing the survey, we will send you a free copy of the resulting report.

Many thanks

Dick Davison
Head of Research & Strategy
mtmconsulting ltd



In order to receive your free copy of the report, please complete your details at the end of the survey.

Please press the 'submit' button at the end of the survey to register your responses.

1. What is your post / role in the school? (please tick one box)

Head	<input type="checkbox"/>	Registrar / Admissions	<input type="checkbox"/>	Administrative / secretarial	<input type="checkbox"/>
Bursar	<input type="checkbox"/>	Marketing	<input type="checkbox"/>	Teacher (marketing responsibilities)	<input type="checkbox"/>

2. How would you describe your school? (please tick all that apply)

Boys	<input type="checkbox"/>	Girls	<input type="checkbox"/>	Co-ed	<input type="checkbox"/>
Day only	<input type="checkbox"/>	Day / boarding	<input type="checkbox"/>	Boarding only	<input type="checkbox"/>
Less than 100 pupils	<input type="checkbox"/>	251 to 500 pupils	<input type="checkbox"/>	751 to 1000 pupils	<input type="checkbox"/>
100 to 250 pupils	<input type="checkbox"/>	501 to 750 pupils	<input type="checkbox"/>	Over 1000 pupils	<input type="checkbox"/>
Pre-prep only	<input type="checkbox"/>	Prep only	<input type="checkbox"/>	Senior with Sixth Form	<input type="checkbox"/>
Pre-prep / Prep	<input type="checkbox"/>	Senior only	<input type="checkbox"/>	All through	<input type="checkbox"/>
HMC member	<input type="checkbox"/>	IAPS member	<input type="checkbox"/>	SHMIS member	<input type="checkbox"/>
GSA member	<input type="checkbox"/>	ISA member	<input type="checkbox"/>	No association	<input type="checkbox"/>
Charity / trust	<input type="checkbox"/>	Proprietorial	<input type="checkbox"/>	Other	<input type="checkbox"/>

3. Approximately what percentage of your total fee turnover do you spend on marketing activities ie advertising, research, PR, events excluding staff costs? (please tick one box)

Less than 0.5%	<input type="checkbox"/>	1.5 to 2%	<input type="checkbox"/>	3 to 3.5%	<input type="checkbox"/>	4.5 to 5%	<input type="checkbox"/>
0.5 to 1%	<input type="checkbox"/>	2 to 2.5%	<input type="checkbox"/>	3.5 to 4%	<input type="checkbox"/>	More than 5%	<input type="checkbox"/>
1 to 1.5%	<input type="checkbox"/>	2.5 to 3%	<input type="checkbox"/>	4 to 4.5%	<input type="checkbox"/>		

4. Do you have a member of staff with overall responsibility for marketing activities? (please tick one box)

Yes - full time	<input type="checkbox"/>	Yes - shared with other activities, but more than 50% marketing	<input type="checkbox"/>
No	<input type="checkbox"/>	Yes - shared with other activities, but less than 50% marketing	<input type="checkbox"/>

5. Is that person also responsible for admissions? (please tick one box)

Yes, as a sole responsibility	<input type="checkbox"/>	Yes, with an integrated admissions and marketing department	<input type="checkbox"/>
No, admissions is handled separately	<input type="checkbox"/>		

6. Has the person responsible for marketing any professional marketing qualifications / experience of marketing? (please tick one box)

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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7. Has he/she had any marketing training specific to independent schools? (please tick one box)

Yes - AMDIS course

Yes - other training

No

8. Is he/she a member of the school's SMT / leadership team? (please tick one box)

Yes

No

9. What other staff assistance does he/she have? (please tick one box)

Around 0.5 FTE

Two people / FTE's

No regular assistance

One person / FTE

More than two people / FTE's

10. Do you have a marketing plan? (please tick one box)

Yes

No

11. If yes, does that plan detail targets for enquiries and admissions? (please tick one box)

Yes

No

12. Do you have a system in place to follow up enquiries? (please tick one box)

Yes

No

13. How do you measure the success of your marketing? (please tick all that apply)

- | | | | |
|--|--------------------------|-----------------------------------|--------------------------|
| The number of enquiries from parents you receive | <input type="checkbox"/> | The general profile of the school | <input type="checkbox"/> |
| The number of visits made by prospective parents | <input type="checkbox"/> | Media coverage | <input type="checkbox"/> |
| The number of pupils admitted | <input type="checkbox"/> | No objective measures | <input type="checkbox"/> |

14. When did you last carry out any research on the views of your parents? (please tick one box)

- | | | | |
|----------------------|--------------------------|---------------------------|--------------------------|
| Within the last year | <input type="checkbox"/> | More than three years ago | <input type="checkbox"/> |
| 1-2 years ago | <input type="checkbox"/> | Never carried out | <input type="checkbox"/> |
| 2-3 years ago | <input type="checkbox"/> | | |

15. Have you ever carried out any research into the make up of your market? (please tick one box)

- | | | | |
|-----------------------------------|--------------------------|--|--------------------------|
| Yes - we did it ourselves | <input type="checkbox"/> | Yes - Bureau service from Experian or CACI | <input type="checkbox"/> |
| Yes - Mandarin (mtm) | <input type="checkbox"/> | Yes - Another external company | <input type="checkbox"/> |
| Yes - ISC Catchment Area Analysis | <input type="checkbox"/> | No | <input type="checkbox"/> |

16. Do you use a bespoke database system for recording enquiries from prospective parents? (please tick one box)

- | | | | | | | | | | |
|---------|--------------------------|---------------|--------------------------|--------|--------------------------|---------------------|--------------------------|---------------------|--------------------------|
| SIMS | <input type="checkbox"/> | Facility | <input type="checkbox"/> | Hebron | <input type="checkbox"/> | School's own system | <input type="checkbox"/> | Other (state below) | <input type="checkbox"/> |
| Phoenix | <input type="checkbox"/> | RS Admissions | <input type="checkbox"/> | Pass | <input type="checkbox"/> | No system | <input type="checkbox"/> | _____ | |

17. When did you last update your main prospectus? (please tick one box)

Within the last year	<input type="checkbox"/>	2-3 years ago	<input type="checkbox"/>
1-2 years ago	<input type="checkbox"/>	More than three years ago	<input type="checkbox"/>

18. When did you last have a new website / a major redesign of your website? (please tick one box)

Within the last year	<input type="checkbox"/>	2-3 years ago	<input type="checkbox"/>
1-2 years ago	<input type="checkbox"/>	More than three years ago	<input type="checkbox"/>

19. What proportion of your enquiries from prospective parents come via your website? (please tick one box)

More than 75%	<input type="checkbox"/>	Around 50%	<input type="checkbox"/>	Less than 25%	<input type="checkbox"/>
50% - 75%	<input type="checkbox"/>	25% - 50%	<input type="checkbox"/>	Don't know	<input type="checkbox"/>

20. Does your website have a content management system (ie are you able to update the pages in the school)? (please tick one box)

Yes - all pages	<input type="checkbox"/>	Yes - only some pages	<input type="checkbox"/>	No	<input type="checkbox"/>
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21. What do you think are the most pressing marketing challenges for your school over the next 12 months? (Indicate up to 3 issues)

- | | | | |
|--|--------------------------|--|--------------------------|
| Raising the school's profile | <input type="checkbox"/> | Improving the quality of your marketing material | <input type="checkbox"/> |
| Maintaining the school roll at its present level | <input type="checkbox"/> | Retaining pupils internally eg from the Jnr school | <input type="checkbox"/> |
| Increasing the school roll | <input type="checkbox"/> | Developing a clear marketing strategy | <input type="checkbox"/> |
| Recruiting more boarders from the UK | <input type="checkbox"/> | Getting all the staff involved | <input type="checkbox"/> |
| Recruiting more boarders from overseas | <input type="checkbox"/> | Better media relations | <input type="checkbox"/> |
| Improving the quality of applicants | <input type="checkbox"/> | More intense competition from state schools | <input type="checkbox"/> |
| Recruiting a particular type of pupil | <input type="checkbox"/> | Targeting new markets | <input type="checkbox"/> |

22. Which, if any, of the following does your school most need help with? (please tick all that apply)

- | | | | |
|---|--------------------------|--|--------------------------|
| Establishing a clear marketing strategy | <input type="checkbox"/> | Renewing your prospectus | <input type="checkbox"/> |
| Market research | <input type="checkbox"/> | Better conversion of enquiries into admissions | <input type="checkbox"/> |
| Identifying your key markets | <input type="checkbox"/> | Media relations | <input type="checkbox"/> |
| Staffing the marketing function appropriately | <input type="checkbox"/> | Involving the whole staff of the school | <input type="checkbox"/> |
| Training for key staff | <input type="checkbox"/> | Communications with parents | <input type="checkbox"/> |
| Renewing your website | <input type="checkbox"/> | Fundraising / alumni relations | <input type="checkbox"/> |

23. Please say a few words on how you would sum up the market conditions for the independent school sector now and in the next 18 months:

In order to receive your free copy of the findings of this survey, please complete the following:

Your name _____

School name _____

Your email address _____

This is the end of the survey.
Thank you very much for taking the time to complete it.

I am interested in how mtmconsulting could help me in the following areas:

Strategy Communications

Marketing Fundraising

Research Recruitment

Please press the 'submit' button to resgister your responses.

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