



# **INDEPENDENT SCHOOLS PROSPECTUS SURVEY**

**Review and analysis of  
Independent Schools' (Senior & Prep)  
Prospectus Packs in 2009**

## **2009 PROSPECTUS SURVEY REPORT**

### **Introduction**

DSD Education has undertaken a third 'mystery shopper' prospectus survey some three years after the last one, and six years since the first in 2003. Apart from identifying current thinking and approaches, there are some interesting comparisons with the earlier years, illustrating how trends change over time. As with the previous surveys, each school was mailed a letter (written as a parent), seeking information relevant to a child's age. Each letter was specifically targeted to match a school's profile (senior, prep, day or boarding, single-sex or co-educational).

Over the three surveys we have received in excess of 650 prospectuses in response, reflecting schools of every size and profile. With such large numbers we are confident that the information contained in this report is sufficiently robust to provide an invaluable insight into the approach schools are taking currently with their promotional material.

In the previous surveys we have achieved response levels in excess of 99%, and so it was slightly disappointing this time to see this figure to drop to around 92%. Interestingly the 'no shows' were strongly biased towards girls' only single-sex schools. We have no explanation for this, other than pure chance.

The profiles of the schools, who responded this time, have split more equally between senior and prep schools, but the number of single-sex girls' schools has dropped away to be replaced by a substantial increase in co-educational schools (80% of the total sample). The split between Day only and Boarding and Day has remained fairly constant throughout each of the surveys, with a marginal increase in Day school responses over time.

### **The Purpose of the Survey**

The independent education sector has become increasingly competitive over the years, and with the current economic downturn we are seeing schools having to fight their corner with even greater vigour. Getting onto the prospective parent shortlist is a crucial part of the process as this will normally lead to a visit of a school. With the market having moved strongly towards 'first time' buyers, the school's marketing material (prospectus and website) is now playing an even more vital role in this first stage decision process.

Keeping a finger on the pulse is an essential part of our understanding of the sector – it allows us to advise with confidence, and to seek new and innovative ways to promote a school enabling it to win a coveted place on this prized shortlist. We are delighted to make it more widely available to help schools in their planning process.

## General Findings

The general quality of design and production has improved yet again since 2006, and that, in turn, was a big improvement on the 2003 survey. In particular the quality of **the photography indicates that professional photographers are now being used to good effect**, and that the days when prospectus design was given to the local printer are long gone, reflecting an increasingly professional approach and the growth of formal marketing departments within the vast majority of schools.

Certainly there are still widely varying standards of design, but the really poor examples are now the very small minority, as opposed to the majority in 2003. Even the quality of the text has improved as schools have realised that academic prose is not required, but a more colloquial and accessible passage of copy that draws the reader in. There is also a growing and positive realisation that a **prospectus needs to be strongly visual** with minimal text to achieve its maximum impact, and that the supportive informative text is better presented in a General Information Book.

**Format:** More specifically, over the years we have seen major changes of emphasis in the format and contents of schools' prospectus packs. This is especially so with the latest survey, where the previous **dominance of A4 portrait format has all but collapsed**, dropping from around 80% of all prospectuses (in both previous surveys) down to **less than 50% this time**. Schools are clearly seeking to stand out from the crowd with a wide variety of miscellaneous sizes and shapes as well as inventive pagination. In particular, we are now seeing fold-out page sections as well inset half pages; not all succeeding in creating the right image, but each attempting to be distinctive.

For schools where the structure includes a Junior School, Senior School, and Sixth Form section, we are seeing a large increase in dedicated brochures within the pack, rather than the integrated approach of 2003. Those that still favour this approach are generally producing large prospectuses of 36+ pages.

**Pagination:** The latest survey shows a much wider range in the number of pages used. In previous surveys, 20 and 24 page prospectuses have been consistently the most popular sizes and have accounted for nearly two thirds (63.7%) of those prospectuses received, whereas in the latest survey this **drops dramatically down to only 38.8%**. This wide range of page numbers reflects the increasing number of fold-out pages leading to 40 and even 46 page brochures

At the other end of the scale there is an increase in the number of smaller prospectuses, in particular 12 pages and 16 pages - the majority of these, however, are from Prep Schools, which of course have higher representation in the latest survey.

**Folders:** We have continued to see **growth in the use of a wraparound folder** (+5%) both to protect and hold together all the contents, but also to provide a quality image for a school. These vary from fairly basic 4 page folders with an unstructured pocket, to highly sophisticated and engineered folders (some 6 pages) with at least two pockets

that are cut, folded and glued into position. A few schools have gone even further, designing and producing a dedicated box to house their promotional material.

The previous favoured method of keeping all the material together has been a **structured pocket on the inside back cover** of the prospectus itself. This still remains a relatively popular choice, but too many schools over pack the pocket with the inevitable result that the prospectus cover becomes distorted and the overall quality of presentation is badly compromised. The worst examples have put pressure on the stitching, leading to pages becoming loose.

**General Information Book:** We have seen too a steady increase in the number of schools that are bringing together the large number of information sheets into one, coherent, book. In 2003 only 28% of the prospectus packs included a printed **General Information Book** – this has **now increased up to 53%**. Nevertheless, there are still far too many envelopes which when opened empty themselves over the floor like confetti, and worse still much of the paper content has little or no school corporate identity.

**Newsletters:** A growing number of schools are now including 4, 8, 12 page, and even 16 page **newsletters** in the pack. Most of these are A4 size, but the more impressive ones are A3, almost tabloid newspaper size. We know from parent research that these newsletters are really appreciated even by those who will have no knowledge who the children featured are, as they **reflect the busy life of a school**, augmenting the more structured information available in the prospectus itself.

**DVDs:** Alongside the newsletter we are starting to see more schools enclosing a **DVD** – the numbers are still relatively small, but show an increase from 2003 (when only 1% provided this), up to 7% in the recent survey. The quality of these DVDs varies hugely, and clearly reflects the budgets that have been available.

**Arts Calendars:** As well as a DVD, in the current survey we have seen the introduction of **Arts Calendars** as a further way of illustrating the dynamic variety of activities in a school. Some of these calendars are quite substantial in size, 12 and even 16 page A5 booklets in full colour.

**Covering Letters:** We were surprised in 2003, when we saw that only 98% had sent a covering letter, and again in 2006 when this figure fell further to 96%, but the latest survey figure (85%) is quite extraordinary. Apart from the normal courtesy of a covering letter thanking the parent for the enquiry, by not writing a letter, personal contacts cannot be established or nurtured to develop a dialogue. It is this missed opportunity that can make all the difference in such a competitive market.

**Follow-up letters:** We have seen the percentage of schools sending follow-up letters also drop away from 25% in 2003 (and this is low), to 20% in 2006, and just 7% in the most recent survey. As with the covering letters, we are surprised that so few schools follow up their prospectus pack. Not even Open Day (Morning) information is being

mailed out to these parents who have shown interest in the school. Again, this is a missed opportunity.

**Registration Forms:** In the latest survey the number of prospectus packs without an enclosed Registration form has increased. The figure has doubled from the last survey when 7% failed to enclose a Form, up to 15% this time. Registration forms are not expensive to produce as generally they are printed in one colour only, so it seems to make little sense not to enclose one.

**Response Times:** It is gratifying to see that these have improved hugely since the previous survey. 38% replied within 3 days compared with half this figure (19%) in 2006, and 57% within 4 days compared with 43% in 2006. The worst response rate was 44 days, one day better than in 2006. Extraordinarily this turns out to be the same school!

While overall the response times have improved, 6% of schools were still very slow in their responses, including three relatively high profile schools that were in excess of 24 days.

## SCHOOL PROSPECTUS PROFILES

	2003	2005/2006	2008/2009
Senior School	59.0%	64.0%	52.0%
Prep School	41.0%	36.0%	48.0%

	2003	2005/2006	2008/2009
Single Sex (boys)	10%	11.0%	10.0%
Single Sex (girls)	26%	27.0%	10.0%
Co-educational	64.0%	62.0%	80.0%

	2003	2005/2006	2008/2009
Day only	31.0%	36.0%	38.0%
Boarding & Day	69.0%	64.0%	62.0%

## CHOSEN FORMAT

	2003	2005/2006	2008/2009
A4 Portrait			31.0%
A4+ Portrait			15.0%
<b>A4 and A4+ Portrait</b>	<b>85.0%</b>	<b>79.0%</b>	<b>46.0%</b>
A4 Landscape			16.0%
A4 + Landscape			5.0%
<b>A4 and A4+ Landscape</b>	<b>9.0%</b>	<b>11.0%</b>	<b>22.0%</b>
Miscellaneous			20.0%
Square			11.0%
<b>Miscellaneous + Square</b>	<b>6.0%</b>	<b>10.0%</b>	<b>31.0%</b>

In the previous surveys the A4+ format was lumped together with A4. In 2008/2009 we have separated these out, but even so we see a major fall in the choice of this format.

## NUMBER OF PAGES

	2005/2006	2008/2009
6	1.0%	-
12	5.2%	12.2%
14	-	1.0%
16	8.9%	15.3%
18	-	2.0%
20	26.3%	22.4%
22	-	4.1%
24	37.4%	16.4%
26	-	2.0%
28	15.9%	12.2%
30	-	1.0%
32	3.2%	1.0%
36	1.6%	6.3%
40	-	1.0%
46	-	1.0%
48	0.5%	2.0%

There is no comparative data from 2003.

## MATERIALS USED

**Silk Art** is still the most popular material used, but there has been a significant **increase in the use of matt stock**, with a growing (albeit still limited) usage of recycled or eco-friendly papers.

## CONTENTS OF PROSPECTUS PACK

	2003	2005/2006	2008/2009	06/09 % +/-
<b>No. using Folders</b>	18.0%	32.0%	37.0%	+5
<b>No. sending Gen Information Books</b>	28.0%	48.0%	53.0%	+5
<b>No. sending newsletters</b>	19.0%	40.0%	42.0%	+2
<b>No. sending Sixth Form brochure</b>	5.0%	14.0%	9.0% *	- 5
<b>No. sending Inspection Reports</b>	9.0%	10.0%	6.0%	- 4
<b>No. sending a covering letter</b>	98.0%	96.0%	85.0%	-11
<b>No. sending Registration Form</b>	90.0%	93.0%	85.0%	- 8
<b>No. sending CD or DVD</b>	1.0%	4.0%	7.0%	+3
<b>No. sending Arts Calendar</b>	n/a	n/a	8.0%	n/a
<b>No. arriving in good condition</b>	76.0%	88.0%	82.0%	- 6
<b>No. arriving pre-printed/brand envelope</b>	n/a	n/a	10.0%	n/a
<b>No. sending 'follow-up' letter</b>	25.0%	20.0%	7.0%	-13

\* This figure is lower than 2005/6, but probably reflects that this latest survey has a greater percentage of standalone Prep Schools.

## TIME TAKEN TO RESPOND

No of Days	2005/2006	2008/2009
<b>2</b>	-	14.0%
<b>3</b>	19.0%	24.0%
<b>4</b>	24.0%	19.0%
<b>5</b>	15.0%	6.0%
<b>6</b>	13.0%	9.0%
<b>7</b>	11.0%	7.0%
<b>8</b>	4.0%	9.0%
<b>9</b>	5.0%	1.0%
<b>10</b>	2.0%	1.0%
<b>11</b>	1.0%	1.0%
<b>12</b>	1.0%	1.0%
<b>13 - 45</b>	5.0%	6.0%

There is no comparative data for 2003.

17 schools failed to respond to the request for a prospectus in 2008/9.

The percentage of those responding within a working week (5 days), have improved from 58% up to 63% in the latest survey.