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Using Marketing Research and Positioning Techniques to Create IMC Campaigns for Private, Charter, or Public Magnet Schools

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Abstract - This article describes how two common tools of consumer marketers, marketing research and positioning analysis, were used to promote enrollment at a private elementary school that draws students from across district lines. The case study uses literature in the relevant fields to follow the process from the development, methodology, and results of the marketing research study to their inclusion in a positioning analysis and map of the school's perceived strengths and weaknesses, to the final integrated marketing communications (IMC) campaign that resulted.

Keywords - IMC, Integrated Marketing Communications, Marketing Research, Magnet Schools, Private Schools, Charter Schools

Relevance to Marketing Educators, Researchers and/or Practitioners -The paper may provide a useful template for use by administrators and marketers of similar schools, whether they be private, charter, or public magnet institutions. By using some of the techniques described here, efforts can be made to stabilize, or even grow enrollment.

Background of Study

The project described here was undertaken to encourage enrollment growth at a private elementary school in the northeastern U.S. The school's enrollment in grades K-8 at the time of this project was 307. Because of its status as a non-public school, enrollment was open to students from different school districts. The impetus for the school to consider marketing efforts was a series of enrollment declines.

The school's dilemma was not unique. The growth of marketing efforts in the not-for-profit sector has been recognized as a major trend (Andreasen, Goodstein & Wilson, 2005). Andreasen and Kotler (1975) identified several reasons for the phenomenon, including pressures on organizations to generate new revenue streams in the face of a more competitive landscape for government grants and

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donations, a "transfer of marketing knowledge" (Andreason et al, 2005: 47) occurring because of the increase in partnerships between for-profit and not-for-profit organizations, and the growth in size of many not-for-profits that affords them the opportunity to set aside positions for dedicated marketing professionals.

One of the key areas of not-for-profit marketing growth has been education, starting with the efforts of colleges and universities. This interest has been detailed in the literature dating back to the 1980s. Buell (1986) noted that many colleges and universities had begun to hire marketing professionals and Mackey (1994) suggested that universities have begun using many of the marketing techniques more commonly associated with consumer products marketers. Schwartz (1993) and Rogers (1998) detailed the aggressive efforts of some leading universities to market themselves using a variety of promotion tools such as advertising and direct marketing. Kotler, along with Fox (1995) wrote another seminal text on the subject, Strategic Marketing for Educational Institutions.

This academic interest in marketing is part of an evolutionary process that has trickled down to the other levels of the education establishment, including secondary and elementary schools. Robenstine (2000) has suggested that one of the key drivers of this trend has been the growth of the school choice movement in the U.S. in the form of publicly-funded charter schools, and the debate over voucher systems for students to attend private schools, including those managed by religious-affiliated organizations. Robenstine concedes that the school choice movement affects institutions in many different ways, largely depending on the geographic location of the institution, but notes that "whatever their schools' market position, administrators will generally feel a need to make their schools more attractive to consumers, cultivating images that will appeal to parents…" (Robenstine, 2000: 97).

Some have even suggested that the school choice movement has ushered in a new era of secondary and elementary school "marketization" (Lubienski, 2007). Kirp (2003) concurs, noting that schools in many areas of the U.S. are increasingly responding with the adoption of marketing strategies "not unfamiliar to the higher education sector" (119).

Another example of introducing market incentives into the education has been the concept of magnet schools. According to Rossell (2003), a magnet school is one that offers some type of special program or theme. She sites examples that include math/science, Montessori, creative and performing arts, and sometimes, reduced class size. Arcia notes that initially, the primary goal of magnet schools was racial desegregation, but over time, this goal has changed to one of overall diversity, serving all students regardless of race or family income (Arcia, 2006). The racial diversity outcomes of the magnet school movement appear to be mixed (Arcia, 2006; Rossell, 2003), but from an academic perspective, there is some evidence that this approach, when implemented on an interdistrict basis, may have positive effects on math and reading achievement (Bifulco, Cobb & Bell, 2009). In their study of

Connecticut magnet schools, Bifulco et al. (2009) noted three factors that may help contribute to the success of such a model: first the Connecticut program draws students from across district lines; second, participation is entirely voluntary; and third, student race is not used in determining admission to any of the participating schools.

Literature Review

To lay groundwork for the discussion of the study at hand, some historical background on the definition of educational marketing would be helpful.

According to Oplatka and Helmsley-Brown (2003), the literature on educational marketing dates back to the late 1980s and originated in the forms of manuals about "how to market your school," (376). Over the course of the following decades, the concept of educational marketing matured. Kotler and Fox (1995) contributed their take: "the analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary exchanges of values with a target market to achieve organizational objectives" (6). Davis and Ellison (1997) defined it as "the means by which the school actively communicates and promotes its purpose, values and products to the pupils, parents, staff and wider community" (3). Perhaps the most relevant aspect of the concept of educational marketing for the present study is Oplatka and Helmsley-Brown's (2003) suggested process of four stages: "marketing research and analysis of the environment; formulating a marketing plan and strategy; implementing the marketing mix; and evaluating the marketing process." (377).

This four-stage process provides an outline for the remainder of this article, starting with the methods used in the market research phase.

Stage 1: Research

The research phase of this project involved a quantitative study of families with students enrolled in the elementary school. A critical aspect of the study was to examine which factors are most important in the school choice decision. A list of 20 possible school choice motivators was generated in a qualitative research phase by members of the school's administration. The list is summarized in Table 1 below:

Table 1: 20 Possible School Choice Motivators

Academic curriculum	Instructional materials that are up to date
After school care program	High technology capabilities (computers, labs)
Art programs	Homework policy
Class size	Music programs
Clergy presence in the school	Physical condition of school buildings
Communication between school and parents	Playground/athletic fields
Community service projects	Religious education
Discipline	Special Programs (for disabled or gifted students)
Dress code	Sports programs
Extracurricular activities (not sports)	Teacher training

These motivators are more numerous than those used in similar studies found in the literature, but include some of the key factors employed by West (1992) in her study of factors impacting school choices for parents in Britain. In fact, this study shares six of West's factors, including: "academic curriculum (good choice of subjects)," "discipline," "extracurricular activities," "music programs (good music facilities)," "physical condition of school buildings (pleasant buildings and atmosphere)," and "teacher training (good/competent teachers)." Riley (2000) in her study of California parents' reasons for choosing charter schools over traditional public schools, used four factors in common with this study, including "academic curriculum," "class size," "discipline," and "teacher training (teacher/staff)." Parker, Cook and Pettijohn (2007), in their study of school choice attributes for private schools in the U.S. also developed a list of school choice motivators, including the following five that both studies have in common including: "academics," "class size," "extracurricular activities," "physical condition of the building (atmosphere)," and "teacher training (teachers have advanced degrees)."

Methods

A paper and pencil survey instrument was distributed to the parents of each of the 308 children enrolled in grades K-8. The questionnaire instrument included 20 the school choice motivator items detailed above, along with related items measuring the perceived effectiveness of the school in addressing each of these motivating factors. Diagnostic questions about the management of the school and demographic questions were also included.

Results

The response rate for the study was 54%, reflecting 101 completed questionnaires out of a total population of 188 households, representing all of the 307 enrolled children.

Results for the school enrollment motivators were the first critical finding of the study. This finding was measured by responses to a set of 20 possible school choice alternatives.

Each of the possible motivating factors was alphabetically arranged on the questionnaire form, and employed a five-point semantic differential scale anchored by 1 equaling "least important," and 5 equaling "most important".

As depicted in Table 2 below, the top five motivating factors were: "academic curriculum," (M = 4.78); "teacher training," (M = 4.62); "communication between school and parents," (M = 4.59); "religious education," (M = 4.55); and "discipline," (M = 4.48).

Table 2: School Choice Motivator Ratings

Attribute	**Mean Rating Score** *1-5 scale with 1 = "least important;" 5 = "most important"*
Academics	4.78
Teacher Skills and Training	4.62
Religious Education	4.55
Communication with Parents	4.59
Discipline	4.48
Up-to-Date Materials	4.41
High Technology	4.27
Homework	4.12
Class Size	4.02
Clergy Presence	4.00

Dress Code	3.97
Affordability	3.83
Community Service	3.78
Music Programs	3.72
Extracurricular Activities	3.71
Physical Condition of School	3.63
Special Programs	3.50
Art Programs	3.36
After School Care	3.35
Playground Facilities	3.33
Sports Programs	3.29

Discussion of Results

These results mirrored Riley's (2000) work most closely, with "academic curriculum," and "teacher training" earning the top rated scores in both studies. "Discipline" was tied for fourth highest rating in Riley's study versus fifth in this study. "Academic curriculum" also scored highest in Parker et al.'s (2007 study, identical to this study, and "teacher training (teachers with advanced degrees)" earning the third highest rating versus second highest in this study. West's British study (1992) diverged the most from this study with only one common motivator ranking in the top five, "discipline."

The next critical research finding was the measurement of parent perceptions about how well the specific school 'brand" being studied performed on each of the school choice motivators noted above. These measures were also gathered through the use of a five-point semantic differential scale, this one anchored by 1 equaling "poor," and 5 equaling "excellent".

As depicted in Table 3 below, respondents rated the school most positively in five key areas, including "academic curriculum," (M = 4.23); "after school program," (M = 4.22); "religious education," (M = 4.09); "class size," (M = 3.93); and "communication between school and parents," (M = 3.80).

Table 3: How the School Rated on Each Motivator (Brand Perception Ratings)

Attribute	**Mean Rating Score** *1-5 scale with 1 = "poor;"* *5 = "excellent"*
Academics	4.23
After School Care	4.22
Religious Education	4.09
Class Size	3.93
Communication with Parents	3.80
Extracurricular Activities	3.74
Teacher Skills and Training	3.69
Sports Programs	3.67
Music Programs	3.57
Affordability	3.53
Dress Code	3.43
Up-to-Date Materials	3.42
Homework	3.36
Community Service	3.36
Discipline	3.34
Physical Condition of School	3.19
High Technology	3.02
Clergy Presence	2.89
Playground Facilities	2.49
Art Programs	2.49
Special Programs	2.32

Stage 2: Positioning and Marketing Strategy

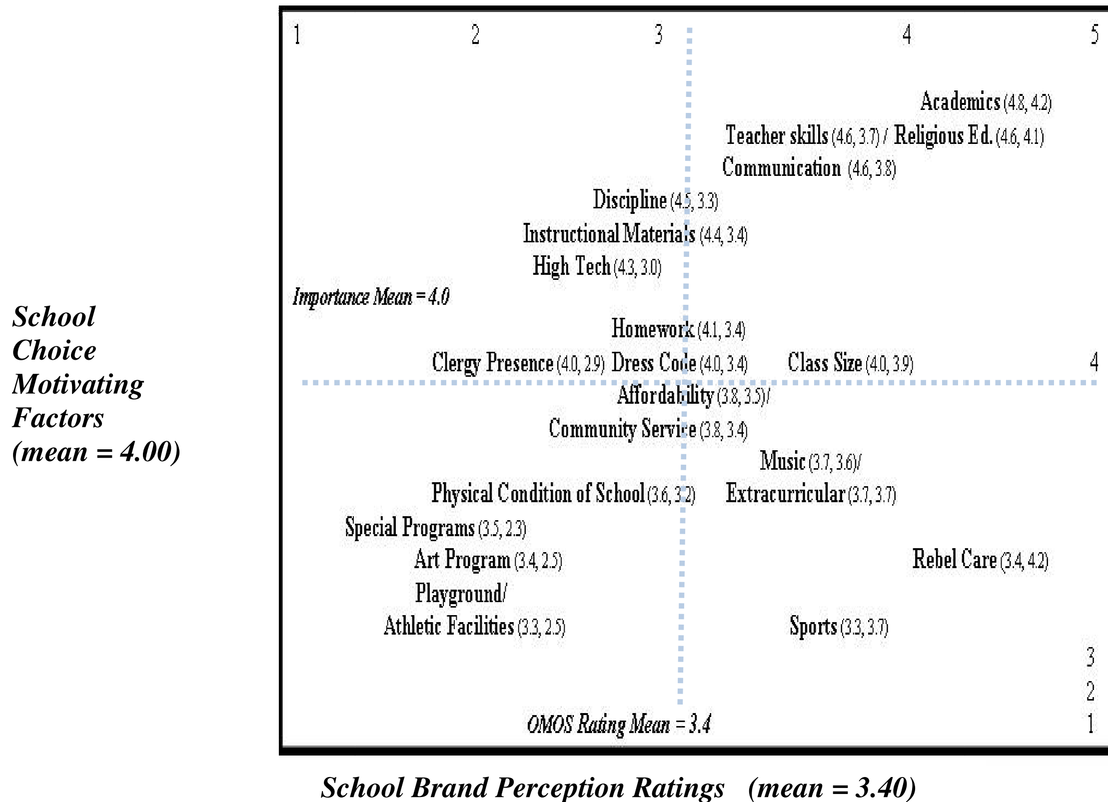
The second stage in the process outlined by Oplatka and Helmsley-Brown (2003) is the determination of positioning and marketing strategy. The term "positioning" dates back to Trout (1969) and Ries and Trout (1981), who identified it as a critical factor in successful marketing due to the need to focus messages to consumers who are the recipients of ever-growing amounts of competing information (Manhas, 2010; Daye and VanAuken, 2011).

Urban and Hauser (1993) further refined the concept of positioning by stressing how important it is in directing marketing strategy. This importance is driven by three critical aspects of a positioning analysis: clarifying the brand's essence; what goals the brand helps the consumer achieve, and how the brand can do it in a unique manner (DeSarbo, Park, and Rao, 2010).

The positioning concept has also been enhanced through the use of multidimensional brand mapping, which has allowed marketers to interpret research data in a visual manner. Early work in this field was detailed by Shocker and Srinivasan (1979), who concluded that this methodology helps provide marketers with "…an understanding of the structure of customer decisions with respect to the market offerings of a firm…" (1979: 159). This enhanced understanding come from the ability to use market research data to plot a brand's position in graphic format with at least two dimensions. Typically, these dimensions represent the category motivators most important to consumers, such as "taste" or "price" for the purchase of a food product. Plotting a brand's position using this type of graph format allows marketers to visualize how consumers view a brand's performance against each of the factors simultaneously. Further refinement of the positioning map methodology was provided by Gavish, Horsky & Srikanth (1983) in their interpretation of consumer motivators for new small car brands in the U.S., and in Shugan's (1987) use of supermarket scanning data to plot the relative positions of different brands of toothpaste, mouthwash, and dishwashing liquid.

For the purposes of this project, the position mapping methods briefly noted above were adapted to help school management develop a marketing strategy by visualizing the school's position in two dimensions: on the vertical axis, the school choice motivating factor ratings data summarized in Table 2; and on the second axis, the perceived school performance ratings summarized in Table 3. The result, synthesized below in Figure 1, is a positioning map that essentially depicts parent perceptions of how the school performs against the key school choice motivating factors. This map allowed school administration to visualize the school's perceived strengths (clustered on the right side of the map) and weaknesses (clustered on the left side).

Figure 1: Positioning Map Based on Research Data



School Brand Perception Ratings (mean = 3.40)

For marketing strategy purposes, the key finding illustrated by the map was that parents perceived that the school performed best on the most important school choice motivating factor: "academics." This provided clear guidance to the administration that the school's academic curriculum should be showcased in the implementation of marketing efforts. The map also suggested that "religious education," "teacher skills," and "communication (with parents)" were also strengths for the school, and should be considered for emphasis in the implementation stage. Also of importance were the areas of perceived weakness that school administration needed to address, including "physical condition of school," "special programs," "art program," and "playground facilities."

Stage 3: Implement the Marketing Mix

The third stage suggested by Oplatka and Helmsley-Brown (2003) is the implementation of the marketing mix. In this case, the school administration initially emphasized the promotion element of the marketing mix by developing a campaign featuring an integrated marketing communications (IMC) approach.

Based on the market research and the positioning map noted above, the strategic focus on "academics" was chosen. To provide specific evidence for the theme, school administrators consulted standardized test scores data. Composite test scores across all age groups ranked the school within the 93rd percentile on the Iowa Test of Basic Skills. Results in specific academic areas included the top 14th percentile in Math, top 8th percentile in Vocabulary, top 7th percentile in Reading; top 5th percentile in Science and top 3rd percentile in Social Studies and Language.

School administrators also looked beyond the standardized test scores for additional clues about the reasons for the positive academic performance. A review of student demographic data revealed a surprising amount of diversity in terms of geography and religious background. Specifically, the analysis indicated that the school drew from a relatively large geographic area, three counties encompassing a total of six different school districts. Further analysis indicated surprising religious diversity, (considering the affiliation of the school is Roman Catholic) with students of 11 different faiths represented. This surprising diversity and drawing power reminded administrators of the concept of magnet schools discussed earlier.

After considering both of these two sets of data (standardized test scores and student demographic data), administrators refined the unique positioning of the school as an "academic magnet" for excellence. Although not officially designated a magnet school by any local, state, or U.S. entity, the evidence suggested that the school essentially acted in much the same manner as that described by Bifulco et al. (2009) in that it drew students from across district lines; its enrollment was entirely voluntary; and that student race was not used in determining admission.

Once the "academic magnet" marketing strategy theme was chosen, school marketing professionals followed a tactical approach that was based heavily on the IMC literature. This literature rests on three basic principles.

First, all aspects of a brand's relationship with a consumer must be considered, including advertising, direct marketing, sales promotion, public relations and personal selling (Duncan, 2002). Second, the IMC approach suggests that messages should be conceptually consistent across all media noted above. This view was confirmed by a study of marketing communications practitioners that found two of the most distinctive IMC features related directly to consistency. Specifically, respondents identified the concepts of "one voice" and "coordinated" as particularly important elements of their view of IMC (Phelps & Johnson, 1996). Schultz et al. (1993) also argued that a brand message that is more consistent in its message across different media is likely to be processed more effectively. Third, IMC theory suggests that an ongoing dialogue between consumers and marketers is critical (Duncan, 2002).

Based on this guidance, specific creative executions were developed to communicate the 'academic magnet" positioning to a target audience of families with students currently enrolled in the school, as well as families with young

children who might be candidates for future enrollment. The target geography included portions of the three counties from which the school was drawing students.

Creative executions were developed for three primary media vehicles. First, an outdoor advertisement was developed and placed on several high traffic locations in the target geography, as depicted in Figure 2 below. The "magnet" theme was clearly communicated in the headline, along with supporting evidence from the standardized test scores, and information about a school open house. The execution also prominently featured a photo of students in their school uniforms, as well as a color scheme and logo treatment that served as the basis for other executions in different media.

Figure 2: Outdoor Execution of IMC Campaign

Direct marketing was the second primary medium used in the campaign. The tactical approach chosen for this execution was a four-page report to the community, depicted below in Figure 3. This execution followed the same design cues introduced in the outdoor creative, but its format allowed for the communication about much more detailed information, not only about the academic theme, but also some of the other strenghts identified in the market research, including "religious education," and "teacher skills." The nature of the report also sought to leverage the fourth area of strength: "communication (with parents)." This piece was mailed to a targeted mailing list of approximately six hundred families with young families within the target geography.

Figure 3: Direct Marketing Execution of IMC Campaign

Regional magazine advertising was the third primary medium used in the campaign, featuring an execution that took its visual and message cues from the outdoor and direct marketing creative in a mannner consistent with IMC theory. This execution, depicted in Figure 4 below, was a one-third page advertisement that appeared in a regional magazine reaching approximately 6,000 households in the target geography.

Figure 4: Regional Magazine Advertising Execution of IMC Campaign

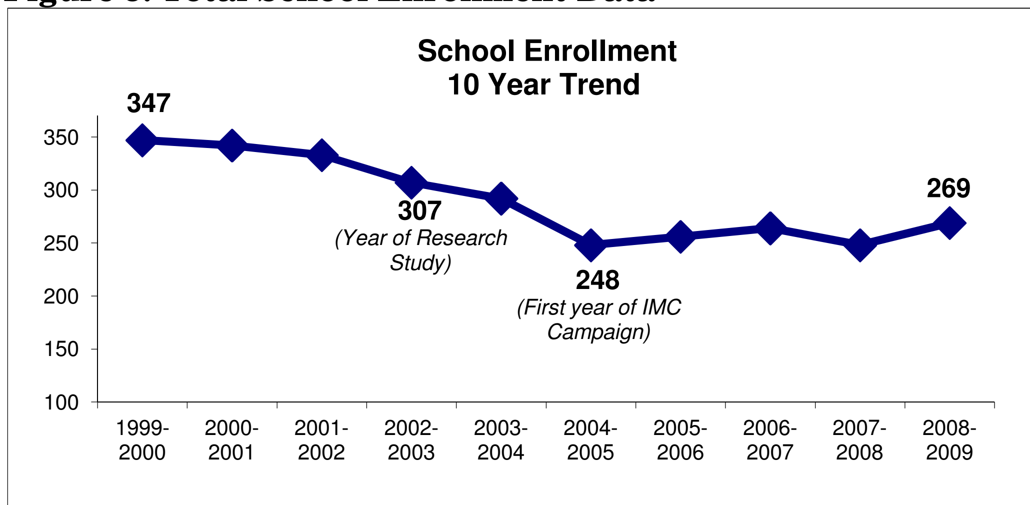
In addition to these three executions, the campaign also integrated the "academic magnet" theme to other media, including the school's web site, public relations (pitching story ideas to local press outlets), sales promotion (offering tuition reduction incentives to families who refer new students to the school), and personal selling, through parent outreach calls by the principal. This last tactic was also helpful in addressing Duncan's suggestion that an IMC campaign should include dialogue with consumers.

Stage 4: Evaluating the Marketing Process

Oplatka and Helmsley-Brown's (2003) suggested final stage in process is the creation of a mechanism to evaluate the results of the marketing process. Since the main focus of this project was reversing declines in school enrollment, the primary measurement of the plan's effectiveness was the total student population prior to the campaign, and in the years after its implementation.

As noted earlier, the school in this project had been experiencing a series of enrollment declines over a number of years. This period of decline is depicted in Figure 5 below. In the four years prior to the administration of the market research study noted above, enrollment had declined 12% from 347 to 307. In the next year, prior to the implementation of the new marketing planning process described above, enrollment declined another 19% from 307 to 248, creating even greater urgency in the need to introduce a more aggressive marketing effort.

Figure 5: Total School Enrollment Data



With the implementation of the IMC campaign, however, the enrollment decline halted, and the total student population stabilized. In the four years since the implementation of the campaign, total enrollment has increased modestly. Some credit for the turnaround may be attributed to the IMC campaign, but the

introduction of new programs, including a new pre-school curriculum, also played a significant role. In any event, the precipitous enrollment erosion has been stopped.

Conclusions/Limitations/Implications

This article sought to provide school administrators and marketers with a "how to" template for approaching the development of an IMC campaign to address enrollment challenges. This effort was guided by Oplatka and Helmsley-Brown's (2003) logical four-step process.

A key limitation of the study was the small sample of the research component of the article, consisting of only 101 completed questionnaires out of a total population of 188 households, representing 307 children enrolled at a single school. There may be factors that are unique to this school, sample, and region, that would make generalization of results impossible. Future research in this field would benefit from the expansion of the sample to a number of different types of schools, representing private, charter, and public magnet schools. An expansion to different geographic regions would also be an improvement.

Another limitation is the reliance on only student enrollment as a measure of effectiveness. As noted above, the introduction of a pre-school program may have contributed to the reversal in enrollment. A superior method would be the replication of the market research study described here, including attitudinal measures, particularly school choice motivators and this school's perceived performance on these measures. Results of this new study could then be compared with the baseline of the original study to determine another non-enrollment measure of the program's effectiveness.

Another limitation is the use of the market research component of the project to measure respondent attitudes of only the school being studied. This provided the data required to develop a strengths and weaknesses positioning map, but data on competitive schools was not gathered, and therefore could not be plotted. In this case, this was a decision made at the time of the study by school administrators. However, in future research, it would be helpful to gather attitudinal data not only on the target school being studied, but also on its private, charter, and/or public magnet school competitors. This data would provide for a richer picture of the school's true positioning in relation to its key competitors.

In conclusion, despite its limitations, this project may provide some guidance to school administrators in both the private and public sphere, as the "marketization" trend in education continues to drive competition for student enrollment.

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