
Email Trends in the Education Market



A Comprehensive Analysis of the
2008-2009 School Year



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2010

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Email Trends in the Education Market 2010:
A Comprehensive Analysis of the 2008-2009 School Year

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Introduction

Market Data Retrieval (MDR) provides marketing information and services for the K-12, higher education, library, early childhood, and related education markets. Powered by the most complete, current, and accurate education databases available in the industry, MDR services include email contacts and deployment, direct mail lists, sales contact and lead solutions, along with web and social media marketing services. Increasing numbers of companies utilize MDR's e-marketing programs to reach prospective new customers via email and to augment their customer files with email data from MDR's database.

This is MDR's fourth comprehensive report about email trends in the education market. Each of these reports has included a summary of prospecting campaigns conducted by MDR on behalf of companies with products and services for education markets. In addition, these reports have included occasional surveys of potential customers about their use of and views about computers, the Internet, and email. In addition, data has been collected from education marketers about their current and projected use of email and other communication channels to reach educators with information about their products and services.

Chapter 1 provides information from an email survey conducted in late 2009 about K-12 teachers' views of email. Because MDR has conducted similar surveys in prior years, trend data is available to illustrate changes in teachers' use of email and related topics. Chapter 2 covers the findings from a survey of school district administrators, and Chapter 3 summarizes the results of a similar survey of college and university faculty. This is the second year MDR has conducted surveys of administrators and faculty. In addition to highlighting trends over time, comparative information about these three important market segments is described throughout these three chapters.

The remaining two chapters take the perspective of education marketers. Chapter 4 summarizes the results of a survey of a sample of MDR's customer file of education marketers about the types of direct marketing they engage in, their views about successful email campaigns, and other issues related to email marketing. Finally, Chapter 5 describes the actual email campaigns conducted by MDR on behalf of education marketers in terms of scope, size, timing, and response rates.

New in this 2010 report are questions about prospective customers' and marketers' opinions and use of social and professional networking sites to gather and share information about education-related products and services. Also new are a series of questions about customer attitudes toward various marketing practices. The marketers' survey included a variety of new questions about major concerns and issues that have developed with the increased use of email marketing.

This report provides valuable insights into how both educators and marketers use and view email. It is intended to help education marketers better understand the marketplace and to plan and execute successful email campaigns as part of their overall mix of marketing activities. It also provides useful benchmark data against which to evaluate completed campaigns and specific actionable tips about best practices.

Executive Summary

This 2010 report on email trends in the education market clearly documents that email and the Internet have become mainstream avenues of communication for both educators and education marketers. In the past decade, e-marketing and Internet commerce have emerged from experimental and supplemental status to being the conventional method of marketing to educators. Marketers report sending more emails to K-12 teachers and administrators and to college and university faculty than ever before (corroborated by the fact that the number of campaigns conducted by MDR to these audiences has also increased significantly in recent years). Educators themselves indicate that they are receiving somewhat more emails with education-related information or advertisements, although their perception of the increase does not seem to be as large as the increase reported by marketers and by MDR.

Evidence that email marketing is successful is demonstrated by the generally positive (or at least neutral) opinions that educators have about many types of email and the fact that the majority of educators report having made at least one purchase as a result of an email advertisement in the past 12 months. District administrators (76%) are most likely to have made at least one such purchase, followed by K-12 teachers (61%) and college faculty (55%).

Educators continue to place value on many types of email they receive from marketers; however, there are indications that some educators are experiencing annoyance about some of the email they receive or the frequency of mailings from some vendors. They tend to open email if they recognize the sender and/or if the subject line relates to their area of specialization, and many like receiving email from companies that provide information about publications of products and services related to their fields. On the other hand, about one-half of educators report that they feel they get too much email from education-related companies that is not of value to them or that they did not request. Of concern is the fact that about one-third of educators indicate that they receive too much email from companies they have purchased from or requested information from. Marketers need to find a balance in how frequently they communicate with prior customers and key prospects, and above all, they need to be certain that their messages convey value and relevance to their particular audience.

Over one-half of all educators use some version of Microsoft Outlook, with increasing numbers adopting Outlook 2007. About one-fourth of educators report that images are always present when they view email, which means that three-fourths generally do not view images when they open email. The inferences of these two findings have significant implications for email marketers and for the design of effective, creative messages that can be easily read by all recipients.

A number of more recent innovations appear to be taking hold in the education marketplace. Just a few years ago, surveys monitored the number of educators who had school or university-issued email accounts, dedicated computers in their classrooms or offices, and access to the Internet. Now virtually all educators report having email accounts, computers, and Internet access. New questions on the 2009 surveys asked about use of wireless devices (BlackBerries, iPhones, etc.) and use of social and

professional networking sites. While not yet widely used, both of these innovations have definitely taken hold, with as many as 38% of district administrators using a wireless device and 37% of college faculty frequently using their computers for professional or social networking sites.

Summarized below are additional key findings from the surveys of K-12 teachers, district administrators, and college and university faculty conducted in December 2009. Also included are highlights from a survey of education marketers and the data analysis about prospecting email campaigns conducted by MDR on behalf of companies during the 2008-2009 school year.

Teachers' Views of Email

- **100% of teachers participating in the 2009 survey report having school-based email accounts**—the first time this milestone has been reached since MDR began surveying teachers about email.
- **Almost all teachers (96%) have access to their school email from home** via VPN or webmail and 9% report using a wireless device, such as a BlackBerry or iPhone, to access their school email.
- **More than six out of ten teachers report making at least one purchase** after receiving an education-related solicitation. This represents nearly a fivefold increase in the past decade.
- **Catalogs remain a valuable source of information** about education-related products for the majority of teachers, who are about evenly split about their preferences for paper or online versions.
- **Nearly three-fourths of teachers like it when asked how companies communicate with them** (either by direct mail or email).
- **48% of teachers feel they receive too much email from education-related companies that they didn't request**, 41% believe they get too much email that is not of value to them, and 31% feel they receive emails too frequently from companies they had purchased or requested information from.
- **Overall, 15% of teachers report using their computers for professional or social networking sites**, with mid-career teachers (with 11 to 20 years of experience) and those who teach in high schools most likely to do so.
- **Web-based school portals and Microsoft Outlook 2007 are the most prevalent email clients/browsers** used by teachers (28% and 22%, respectively).

District Administrators' Views of Email

- **Nearly all administrators check their email at least daily**, with half reporting that they check it all day long, whenever there is time, including nights and weekends.
- **38% of administrators report using a wireless device**, such as a BlackBerry or iPhone, to access their office email. Of all three groups of educators surveyed, administrators are most likely to have such devices, and in just one year, the percentage of administrators with wireless devices has gained 11 percentage points.
- **Administrators are likely to open email with subjects related to their area of responsibilities.** They are least likely to open emails that mention state standards or that reference testimonials from other education leaders.
- **Most administrators (76%) purchased an educational product or service** as a result of an email advertisement during the past 12 months. The number of administrators making four or more such purchases increased to 23% in 2009, compared with 15% in 2008.
- **Administrators are much more likely than teachers to respond to the following sources of email:** a company from whom they had previously purchased (80% of administrators and 52% of teachers), a company from whom they had requested or received information (78% compared with 58%), and an authorized supply vendor (61% compared with 40%).
- **Email invitations to seminars, webinars, or focus groups on topics related to their job functions** are highly valued by 41% of administrators—higher than teachers (25%) and college faculty (35%).
- **31% of district personnel report using Microsoft Outlook 2007**, an increase of 12 percentage points in the past year.

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College Faculty Views of Email

- **Email communications by faculty have increased in both scope and frequency** with all audiences.
- **More than double the percentage of faculty in 2009 frequently communicate via email with vendors** of education-related products and services compared with faculty in 2008.
- **Faculty tend to prefer email to paper.** Only 20% of faculty prefer receiving direct mail catalogs and brochures about educational products, compared with 24% to 36% who prefer email communications about special offers, email communications with links to websites, and email communication about new products.
- **Email communication about special offers and pricing received a most valuable rating by 24%** of faculty in 2009, compared with 19% in 2008.
- **Nearly one-half of faculty report receiving two or fewer education-related email offers** in an average day, and only a small proportion of the 2009 group report receiving more such emails compared with the 2008 survey.

- **55% of faculty bought an educational product or service** as a result of an email advertisement.
- **37% of all faculty surveyed report using their computers for professional or social networking sites;** however, more than half of younger faculty (with five or fewer years of experience) report doing so.
- **41% of college faculty use Microsoft Outlook 2007.** Web-based portals (school, Gmail, Hotmail, Yahoo, etc.) account for 26% of the clients/browsers used by faculty.

Survey of Education Marketers

- **Marketers rank email as the most effective marketing channel** in the current survey, up from third place in 2007.
- **Email has become the most common type of direct marketing activity,** with 88% of marketers conducting email marketing campaigns and 84% doing direct mail campaigns during the past year.
- **Multi-channel marketing has become standard practice,** with the primary activities being (in order of frequency) email, direct mail, trade shows, web eCommerce, and print advertising.
- **Significant increases were reported in online advertising and search engine marketing efforts** over the past two years, highlighting a dramatic shift toward Internet marketing and eCommerce.
- **53% of education marketers project increases in their email marketing budgets** for next year, primarily because of its overall effectiveness (including cost-effectiveness), technical characteristics (ability to track results, etc.), and recognition that email is the preferred method of communication for most of their prospective customers.
- **Budget decreases were projected for direct mail (non-catalog) by 38% of marketers,** for print advertising by 33%, and for catalogs by 26%.
- **50% of education marketers are engaged in some form of social marketing—**34% use email in this effort and 24% plan budget increases for next year.
- **72% of marketers report that all email creative is handled in-house;** however, only 41% report that their current staffing/resources are adequate.

Prospecting Email Campaigns 2008-2009

- **There were 6,464 prospecting campaigns deployed to educators during 2008-2009, an increase of 23%** compared with the prior year. The average (mean) campaign size was 8,006 and the median size was 2,953. Actual email volume is estimated to have increased 47% in the past year.
- **The average recorded Open rate was 10.1%**, down 2.2 percentage points compared with last year and continuing the trend begun in the early 2000s, as email browsers and security systems block the tracking of whether emails are opened.
- **There is a direct inverse correlation between size of campaign and Open and Click-Through rates.** Small, targeted campaigns (often conducted by publishers of college texts) have the highest Open and Click-Through rates, while large campaigns have the lowest rates.
- **The Click-Through to Open Ratio increased to 0.25**, meaning that of those for whom it was possible to track Open rates, 25% also recorded a Click-Through.
- **Marketers are deploying their back-to-school campaigns earlier than ever before**, with September moving ahead of October as the highest email campaign month in the fall.
- **Tuesday has been the most popular day for deployment** (for 29% of campaigns) for the past two years.
- **The most popular time for deployment is 9:00 AM to 9:59 AM**, which was the time block with the highest recorded Open rate (10.9%) but only the third highest Click-Through rate (2.7%).
- **One in four campaigns was directed to the higher education market.** These campaigns tend to be smaller (average size: 2,703) and have high Open and Click-Through rates (15.0% and 4.5%, respectively).

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About MDR

For more than 40 years, MDR has been the market's first choice for marketing information and services for the K-12, higher education, library, early childhood, and related education markets. Powered by the most complete, current, and accurate education databases available in the industry, MDR provides email contacts and deployment, direct mail lists, sales contact and lead solutions, along with web and social media marketing services. Through the EdNET suite of products, industry leaders can gain insight and opportunity through comprehensive market intelligence and analytical reports, custom research services, high-profile networking opportunities, and professional events.

MDR also publishes a variety of research reports, including *Educator Buying Trends: A National Survey*, the *Enrollment Comparison Report*, and *Public School Expenditures*.

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