

Digital Marketing Trends in the Education Market

2013



A Comprehensive
Analysis of the 2011-2012
School Year



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Digital Marketing Trends in the Education Market 2013:
A Comprehensive Analysis of the 2011-2012 School Year

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Introduction

Market Data Retrieval (MDR) provides comprehensive marketing information and services—including email contacts and deployments, direct mail lists, and web and social media marketing services—for the K-12, higher education, and related education markets. MDR clients represent most of the key players in the education industry, ranging from large international corporations with extensive offerings to small providers of extremely specialized services. The products these organizations promote to the education market include an array of curricular materials and resources; school supplies; assessments; professional development; and technology hardware, software, and related services. Digital educational resources continue to grow as they supplement or replace traditional print materials.

Similarly, education companies are using more digital marketing channels and less direct mail and other print media. While email campaigns are the most popular marketing activity, education companies are engaged in social media marketing, Internet advertising, search engine marketing, and a variety of related digital marketing efforts. MDR recognized this shift a year ago when it revamped its earlier annual report series, which documented five years of email marketing trends, to produce its first report on *Digital Marketing Trends in the Education Market*. This 2013 report represents the second in this new series, providing detailed information about K-20 educators' use of online digital resources together with data about email, web advertising, and other activities conducted by education marketers.

Chapter 1 summarizes the results of a survey of PreK-12 public school teachers conducted in early 2013. Topics include how they research and access digital content for instructional purposes, how they incorporate this material in their classes, the types of devices they and their students use to view this material, how they use social networking sites, and various issues related to email messages they receive from education marketers. Because some of the questions were included on earlier teacher surveys, trend data is also included. The findings of similar surveys of PreK-12 district-level administrators and of college faculty are provided in Chapters 2 and 3.

Chapter 4 reports on a new, more potent approach to Internet advertising that offers more focused targeting of ads to specifically desired prospects (e.g., K-12 principals). Launched in March 2012, MDR's Targeted Web Advertising solution uses proprietary first-party data that link banner ads to educators by leveraging MDR's deep databases for targeted email and direct mail campaigns. Analyses of the first round of data on this approach address performance rates and variations by campaign objective, line of business, and banner size and type.

The final chapter on prospecting email campaigns is similar to material covered in the earlier MDR reports on *Email Trends in the Education Market*. It includes a summary of prospecting email campaigns conducted by MDR on behalf of education companies during the past school year. In addition to standard data on Open, Click-Through, and opt-out rates and timing of deployments (month, day, and hour), analyses on various types of personalization are included.

This report provides valuable insights about how educators use digital content; the types of devices they use; and how they view and respond to email, web advertising, and social media. It also provides benchmark information about current practice and trends in marketing to the education industry. Lessons learned and best practices are highlighted to help marketers plan and execute improved education marketing strategies in the future.

Executive Summary

Digital Marketing Trends in the Education Market 2013 shows that email marketing continues to play a central role in the overall marketing strategy of organizations serving the K-20 education industry. The report also reveals the extent to which digital technologies are permeating both the education establishment and education marketing. Beyond email, marketers are finding new approaches in social media and in web advertising to reach desired education prospects for their offerings. Digital offerings from companies for educators include digital and video content on websites, apps that deliver content through mobile devices, digital versions of textbooks and ancillary materials, and content for interactive whiteboards.

While educators seek online digital content from many sources, the most common for K-12 teachers and district administrators is still the district portal or website. Almost all K-12 teachers and 86% of college faculty use some form of digital content for instructional purposes in their classes at least weekly. Two-thirds of district administrators and half of teachers use tablets or smartphones to access online digital content. Eight out of ten district administrators access their school email on a wireless mobile device, compared with two-thirds of K-12 teachers. College faculty report significant increases in the use of tablets and smartphones, with each used by more than 40%. More than half of college faculty teach hybrid courses, with part of the class online, and increasing numbers teach purely online courses.

Seventy percent of district administrators and more than half of both K-12 and college faculty purchased an educational product or service as a result of an email solicitation. Use of both consumer and professional social networking sites is growing. District administrators are greater users of these sites than K-12 teachers or college faculty. Educators reached by well-focused email marketing campaigns continue to take action at a rate similar or possibly higher than in the past. Marketers are creating relevance by using personalization and dynamic content insertion. Personalization, on average, lifts response rates.

How marketers communicate with target audiences and the tools they use continue to evolve as the technology offers dynamic new opportunities. MDR's Targeted Web Advertising uses proprietary cookies to link traditional web-user information with deep background data from MDR databases, making it possible to direct selected banner ads to targeted demographics.

Teachers' Use of Online Digital Content and Email

- Nearly all teachers (97%) use one or more website types to research and access online digital content for use in their classrooms. District portals are used most frequently (by 81% of teachers), followed by streaming video sites (used by 56%), an increase of 9% from the prior year.
- While school, home, and laptop computers are used most often to access online digital content, more than half of teachers use smartphones and 45% use tablets for this purpose. Two-thirds (64%) of teachers can access their school email on a wireless mobile device.
- Three-quarters (74%) of teachers have taken an online course for their own professional development, continuing education, or a degree program, an increase from 64% in the prior year. Half (51%) of teachers maintain their own website for their classes.
- Seven out of ten teachers visit social media websites (either mass market or professional sites) at least a few times a month to access online digital content. This generally holds true regardless of teachers' years of experience. The highest use is at the 9-12 grade level (77% of teachers). The most frequently cited reasons are to exchange ideas or to obtain free resources. YouTube was the No. 1 site mentioned that teachers said they used; however, 41% said that YouTube was blocked at their school.
- More than half of teachers purchased an educational product or service as a result of an email solicitation, spending about the same as in the prior year. Of those influenced by social media to purchase or recommend products, two-thirds said that Facebook, Pinterest "Pins," and a recommendation from an online community of practice were important. K-12 teachers cited Pinterest far more than college faculty.

District Administrators' Use of Online Digital Content and Email

- The district portal is the most frequently visited website by district administrators, with 88% accessing it daily or a few times a week. News and media sites, commercial/retail websites, mass market social media websites, and video sharing sites were others visited frequently. Primary reasons cited were to research or monitor current educational issues and trends, to research and purchase educational products for the district, to create/exchange curriculum, and for professional development.
- Devices used most frequently by district administrators to access digital content are district, home, and laptop computers. Two-thirds use tablets or smartphones to access online digital content, a larger percentage than teachers. Nearly a fifth said they use an eReader. In the next five years, district administrators expect to see more tablets, eReaders, cell or smartphones, and iPods used by students to access online content.
- Social media websites (either mass market or professional sites) are used by 77% of district administrators, more than by teachers (70%). Mass market social media sites are used at least monthly by 63% of administrators, and professional or educational social media sites by 59%—primarily to exchange ideas. Blocked sites that district administrators would like to use for work include YouTube, Facebook, Twitter, and Pinterest. YouTube was reportedly blocked in 45% of districts.
- Almost a third of district administrators report receiving more than ten education marketing emails daily, a growth at this level of 19% over the prior year. Receipt at lower email levels stayed about the same. Another third of district administrators receive from five to ten a day.

- In 2013, 70% of district administrators reported they purchased an educational product or service as a result of an email advertisement. Half made one to three purchases. More than 10 purchases were reported by 3%, a slight increase from 2012, while 2% reported making more than 20 purchases from email solicitations.
- Eight out of ten (82%) district administrators access their school email on a wireless mobile device, compared with 61% in the prior year. Of those who use mobile devices, iPad tablets were most popular, cited by 65% of these administrators (compared with 46% of teachers who use mobile devices). More than half (53%) of administrators with mobile devices said they used the iPhone. The Android phone is used by 23% and BlackBerry by 7%. Android tablets were used by 6%.

College Faculty Use of Online Digital Content and Email

- Most college faculty (86%) use their university website or portal daily or a few days a week to seek out online digital content. News and media sites are the next most popular, with two-thirds of faculty using them frequently. Nearly half reported frequently using professional/association/government/reference websites, video sharing/streaming websites, and commercial/retail websites. At least one or more of these sites are used frequently by 96% of faculty.
- Eighty-five percent of faculty members report accessing online digital content on their university computers, and more than three-quarters report using their laptops and/or home computers. The 2013 survey found significant increases in the use of tablets (42%) and smartphones (45%), from roughly a third of faculty a year earlier.
- More faculty are teaching online courses and more hybrid courses combining online with on-site classes. Four out of ten (42%) faculty report teaching part or all of their courses online. Many more faculty have begun teaching courses that are not fully online but rather hybrid or other online types. Faculty teaching hybrid courses doubled, from 25% in 2012 to 51% in 2013.
- Half of faculty frequently use social media websites (either mass market or professional/education-related ones) as a resource for online digital. About a fifth of faculty members use mass market social media websites daily. YouTube was named as one of three sites used in teaching by 40% of faculty and Google by 24%. The primary reasons for social networking are the exchange of ideas and obtaining free resources.
- For mass market social media sites, daily use by younger faculty (less than 20 years' experience) was 24%, compared with 16% for the older group. Of faculty with fewer than 20 years' experience, 15% reported using video sharing/streaming sites daily, compared with 8% daily use among those at the university more than 20 years.
- In 2013, 69% of college faculty reported using wireless mobile devices for education-related email, up from 54% in 2012. Among those using these devices, the iPhone and the iPad tablet were used most frequently, by 49% and 48%, respectively. Android phones and tablets ranked next, at 25% and 7%, respectively. BlackBerry was listed by 5% of faculty.
- Half of college faculty made a purchase of an educational product or service as a result of an email advertisement. This is the lowest level in five years. Just over half spent \$100 or less. Two-thirds of faculty reported Facebook (likes, mentions, etc.) as a social media influence on purchasing or recommending educational products.

MDR's Targeted Web Advertising Solution

- Launched in March 2012, MDR's Targeted Web Advertising product uses proprietary cookies to link traditional web-user information with deep background data from MDR databases. This makes it possible to direct selected banner ads to the specific demographic a marketer wishes to target (e.g., K-12 principals). Early experience with the product shows an average Click-Through rate of 0.12%, significantly higher than that obtained with traditional banner ads (0.10%).
- The highest Click-Through rate of 0.180% was achieved by companies marketing app/ developer platform systems. The audience interested in these systems is both highly specific and targetable. The lowest Click-Through rate (0.077%) was for perhaps the most general provider, educational institutions/government.
- The "leaderboard" style of banner ad (728 x 90 pixels) was used in 44% of ad impressions. Next in popularity was a square banner (300 x 250 pixels), with 35% of impressions, followed by a "skyscraper" style ad (160 x 600 pixels), with 22%. The notable Click-Through rate of 0.16% obtained with the skyscraper banner ad is a third or more higher than with either the square or the leaderboard.
- While animated banner ads stimulate the eyes and typically generate a higher Click-Through rate than static banner ads, essentially identical Click-Through rates were obtained with animated GIFs (0.130%) and with static banners (0.128%). Flash banners in this study did not generate the expected higher Click-Through rate, scoring 0.095%. Research suggests that there is a "sweet spot" between animation being appealing or annoying, thereby capable of influencing results positively if well done or negatively if animation is excessive or poorly executed.
- MDR's capabilities for additional tracking of the user experience lead to two significant alternative measures for campaign success: post-impression conversions and post-click conversions. Of all conversions, virtually two-thirds were of the post-impression type. Going forward, MDR expects these new measures to provide deeper analyses of campaigns and new opportunities to optimize campaigns.

Prospecting Email Campaigns 2011-2012

- A total of 8,623 prospecting email campaigns were deployed by MDR on behalf of clients during the 2011-2012 school year. This is a 4% decline from the prior year but is virtually the same number of campaigns as in 2009-2010. Nevertheless, email volume in 2011-2012 MDR campaigns rose 2% over the prior year. Beyond this, more marketers deployed their own campaigns using addresses provided by MDR, further boosting overall growth in the volume of email marketing messages to educators.
- The 2012 average campaign size was 9,510, an increase of 6% over the prior year. Half of these campaigns sent messages to fewer than 3,000 educators. Twenty-one percent of campaigns targeted 10,000 or more educators, and 29% of campaigns addressed from 3,000 to 9,999. Total campaign size ranged from 100 to 582,243. One percent of campaigns sent messages to more than 100,000 educators.

- The average Open rate in 2012 was 7.6%, virtually identical to the prior year. Smaller email campaigns (100-999 emails sent) had almost twice the Open rate (12.7%). The average Click-Through rate declined from 2.3% to 1.9%. Much of this decline can be attributed to a number of massive, less sharply focused campaigns. The 10% of campaigns that were smallest garnered a Click-Through rate of 4.3%, compared with 1.4% for the 10% of campaigns that were largest. The 80% of campaigns between these in size had an average Click-Through rate of 2.5%. Educators reached by well-focused email marketing campaigns continue to take action at a rate similar or possibly higher than in the past.
- September and October together represented one-quarter of all email campaigns. However, February had the highest response rates on average of any month in 2012, with an average unique Open rate of 8.3% and unique Click-Through rate of 2.6%. While Monday and Friday have the smallest percentage of campaigns sent, they have the highest Open rates (8.0 and 8.3%, respectively).
- The highest Open rate (8.9%) was for emails sent between midnight and 6:59 AM. The best daytime Open rate (8.1%) was from 10:00 AM to 10:59 AM. For several years, this time slot also has shown the best Click-Through performance. In 2012, however, the highest Click-Through rate (2.5%) was achieved in the 11:00 AM to 11:59 AM time slot, compared with 2.1% in the 10:00 AM to 10:59 AM slot.
- Clients in particular lines of business were the most successful in getting the largest Open and Click-Through rates. These include college publishers, award/emblem/fund-raising, and association/non-profit. College publisher campaigns, which characteristically are narrowly focused, achieved a 12.1% Open rate and 3.9% Click-Through rate.
- Marketers are creating relevance by using personalization and dynamic content insertion. Personalization, on average, lifts response rate. Personalizing the “To” line with the recipient’s last name has the most impact on performance (Open rate, 13.3%; Click-Through rate, 5.0%). Personalizing both the “From” and “To” lines can have an even more dramatic impact: sending from a named person to a recipient’s last name yielded a 16.5% Open rate and 6.1% Click-Through rate.

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About the Authors

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Bill Oates is a science and technology writer and college professor of journalism and public relations. His eclectic career includes working as an engineer, software developer, association executive, public relations writer and editor of *The Miami Herald International Edition*. Oates has developed educational software, used it in teaching, trained other teachers, and published groundbreaking research on educational technology. His publications include three previous MDR surveys of technology in schools and colleges (with Rita Oates) as well as *Computers in English and the Language Arts* (with Cynthia Selfe and Dawn Rodrigues), a book published by the National Council of Teachers of English. With more than 25 years in educational technology, Bill now focuses on high-quality communications services to the industry through Oates Associates.

Currently a freelance writer, editor, and teacher, Bill can be reached at 305-527-1132 or through email at billoates@aol.com.

Rita Oates

Rita Oates has rich experience in both K-12 and higher education. She is the former ed tech director of Miami-Dade County Public Schools, the nation's fourth largest school district, and former chair of the graduate program in educational technology at Barry University. Her publications include 3 previous MDR surveys of technology in schools and colleges (with Bill Oates) and 10 books and 100 articles on education, technology, and school reform. She was the founding editor of the monthly *Internet Strategies for Education Markets*, writing about online products for K-20 and home markets. With Bill Oates, she wrote a monthly column, "Kids and Computers", for *South Florida Parenting* magazine for seven years. She has worked on educational technology projects for companies including Microsoft, ePals, Scholastic, BBN, ENA, and the U.S. Postal Service and has conducted multi-year evaluations of teacher training programs in universities in Florida and New York. She was education editor of VIEWTRON, an online service, in the 1980s.

President of Oates Associates, a consulting firm, Rita can be reached at 305-669-9090, through email at ritaoates@aol.com, or at www.ritaoates.com.

Derek Fairfield

Derek Fairfield currently leads e-marketing product development at MDR. Previously, Derek managed MDR's Sales Solution product line as well as its Analytics products. Derek also acts as a strategic consultant for MDR's interactive marketing customers and directs MDR's industry-leading e-marketing research and best practices efforts. Derek is a regular presenter on MDR educational marketing webinars. <http://www.schooldata.com/mdrwebinars.asp>

Before joining MDR, Derek designed, developed, and deployed B2C and B2B marketing strategies and programs for start-ups and Fortune 500 companies. In 1997, Derek led an account team that won a DMA Echo Award for online lead generation and email acquisition campaigns. Derek is a strong advocate for e-marketing in the education industry and general marketing best practices. Derek can be reached at 203-225-4643 or through email at dfairfield@dnb.com.

Kim Booth

Kim Booth is the product manager for MDR's Web Advertising product suite. Kim came to MDR from the digital agency world, where she spent over 12 years managing a diverse portfolio of clients, including automotive, financial services, consumer products, and travel across all digital communications channels. Early in her career, Kim led new business ventures at Kirshenbaum Bond Senecal and Partners, followed by a host of interactive project management responsibilities at top agencies, such as Omnicom and Digitas.

Kim brings this digital marketing expertise to MDR's Web Advertising team to develop and optimize strategic campaigns that meet our customers' end objective. Kim can be reached at 203-225-4902 or through email at boothk@dnb.com.

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 digital 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 *State of the K-12 Market*, *Digital Marketing Trends in the Education Market*, the *Enrollment Comparison Report*, and *Public School Expenditures*.

When business objectives call for growth, market leaders call on MDR.

MDR, a D&B Company, is headquartered in Shelton, Connecticut.

Digital Marketing Trends in the **Education Market 2013**

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