



The Dubai Schools Mystery Shopper Report

A report by
The Education Intelligence Group
April 2017

Executive Summary

School marketing budgets in the UAE have doubled in the past year. It's clear that the competitive landscape has shaken the sector in Dubai. Schools are offering discounts and scholarships like never before. In 2016, schools in the UAE spent \$14,648,627 on advertising excluding their digital spending, which means this number would exceed \$20,000,000 in real terms. Parents are in the driving seat and their position of power means that they can shop around to find the best deal. Schools have attempted to incentivise parents with free uniforms and extra-curricular activities included in the school fees. Incidental discounts are becoming more frequent and parents are exercising their bargaining power with school admissions offices.

This report shines a light on the school admissions process. With schools spending so much on advertising with the hope of attracting parents, we wanted to explore what happens when those parents enquire and move through the admissions funnel. The most significant findings in this report will be unsettling for school owners, operators and senior leaders. The vast majority of the schools in this report are deemed complacent. Complacent in their treatment of parents, complacent in their processes for managing communication and complacent in their ability to convince parents about their education message.

In the report, only 58% of the schools focused on the individual needs of the parents and only 50% of schools were judged as strong in their communication throughout the entire process. Interestingly, some of the new schools fared much better in the survey compared to the most established schools. Their efficient communication processes and treatment of parents were seen as very good. In some cases, the educational messages were exceptional and very convincing. The more established schools were judged as lacklustre and the parents were not convinced about their education message due to their lack of professionalism and lack of care and attention to their needs.

This report includes a review of the competitive landscape of school advertising, with the published advertising spending of schools in Dubai. Interestingly, some of the new schools fared much better in the survey compared to the more established schools. This analysis highlights the schools that take their digital presence seriously. The report then includes an analysis of the mystery shoppers' telephone interactions and school visits with an overall rating for each school's ability to manage parents through the admissions process.

Executive Summary

This is a must read for school owners, operators and registrars who recognise that competition increases quality and highlights complacency. The power is back in the hands of the parents and sub-optimal processes and handling of data may prevent schools from developing their pipeline of prospects for the future.

The highest performing schools in this report might be in a position to increase their pipeline of prospects and compete for the market share of parents. The evidence suggests that some schools need to overhaul the management of their admission's processes and recognise that the admissions practises of before are no longer acceptable in today's competitive climate in Dubai.

Contents

2	Introduction	19	The Quality of School Visits
4	About the Education Intelligence Group	24	The Overall Performance of Schools
5	The Competitive Landscape of School Advertising	29	The Implications of this Report
9	The Mystery Shopper Survey	31	Recommendations
10	The Quality of School Websites		
15	The Quality of Telephone Interactions		

Introduction



We have heard the stories about schools being dismissive of parents.

We have heard the stories about schools being dismissive with parents' data; we have also seen some schools perform exceptionally well and treat parents with the respect they deserve as fee paying customers.

The mystery shopper matrix was designed by our team in partnership with parents. We discussed what parents look for when they start their search of schools online and why a strong digital presence is a necessity. We analysed the school websites to see if they were convincing and up to date with relevant content. As an extension of this, we analysed the school websites from a technical perspective to see if the schools were digitally competent, secure and "firing on all cylinders" when it came to presenting information quickly, effectively and in a way that would be indexed highly by the likes of Google.

Schools and admissions teams regularly refer to the registration process as the admissions funnel. For the purposes of this document, we will define it as the journey a parent takes from the advertising stage all the way through to becoming a paid and registered parent. Registrars are often the people responsible for converting parents through the funnel and we felt it was appropriate for the mystery shoppers to rate the quality of the service and communication demonstrated by the registrars and the admissions teams. The role of registrars is critical in this process and the necessary skill set of a registrar in today's environment is vastly different than before.

The mystery shoppers visited the schools that were successful in the telephone interactions. This is authentic representation of the registration process. As this is the first mystery shopper report that we have published, we have decided not to name the schools in this report; however, all of the schools visited had one thing in common, the fees for Foundation Stage One started at 40,000

Introduction

AED or higher, categorising the schools as 'premium'.

Schools need to be aware of how to manage parents in the admissions funnel and what the critical factors of success are to convert enquiries into paying, registered parents. Schools rely on parents as their main source of income so the education message communicated to parents at each stage is critical in getting high conversion rates, and perhaps more importantly, parents that talk positively about the school.

A WhichSchoolAdvisor.com study has found that some Dubai parents will spend as much as 1.3 million AED to educate their child in their lifetime. Parents in Dubai are already cost sensitive due to the current economic climate. Therefore, schools need to recognise the signals given during the admissions process could result in a happy and registered family, or a family looking at several other options that are equally as affordable.

The data within this report will at times be uncomfortable but it is entirely necessary to share these findings and engage in dialogue that improves this aspect of the sector.

About EIG

The Education Intelligence Group is a partnership of industry professionals who came together to form a consultancy as a means to impart their knowledge and expertise to a rapidly growing UAE education sector. EIG has made it its mission to offer its clients market leading data and analysis so they can avoid the pitfalls of their peers. On a daily basis, they work at the highest level with school operators, investors, regulators, school principals, and senior school management.

The combination of their diverse and complementary experience across school curricula, allied to the rigorous and uncompromising analysis of data, provides potential investors with a unique perspective. That perspective can be best summed up in one word – clarity. Through their peerless contacts, the EIG provides a specific, up-to-the minute, detailed map of the UAE school landscape.

The Competitive Landscape of School Advertising

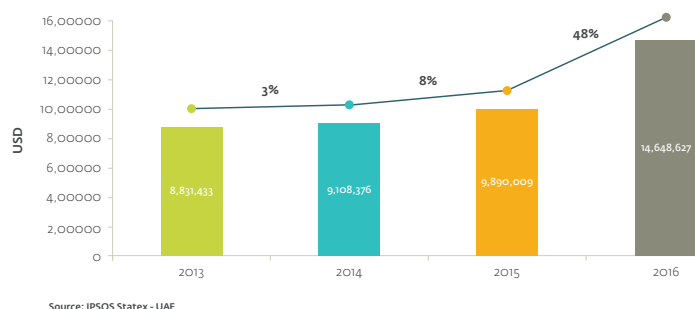
Schools in the UAE spent over \$9,120,828 between January and May in 2016 on advertising, excluding digital advertising. In the same period in 2015, that was figure was \$5,384,065 which represents an 83% increase in advertising spend across schools.

These figures may be frightening to some but they are indicative of the competitive landscape of the UAE. New schools entering the market have to compete with existing schools to attract parents as the pressure to repay the large capital costs carries a huge burden. Every single school or operator in the top 20 spenders was a new school or an existing school of one year. Out of the top twenty spenders, two were in Abu Dhabi, 17 were in Dubai and the rest were spread across the emirates.

By the end of 2016, schools in the UAE spent \$14,648,627 dollars on advertising excluding their digital advertising. This figure is broken down into newspaper advertising, outdoor (bill boards, MUPIS, LED screen, bridge banners etc), magazine advertising, radio and cinema. To put that figure into perspective, in 2015, schools spent \$9,890,009 on the exact same channels. Let that sink in for second a 48% increase in advertising from one year to the next.

Spending peaked in March 2016 as schools invested heavily in newspaper and outdoor advertising. With more new schools entering the market, the need for an expanding marketing budget will put more pressure on repaying the capital costs which may present several, different scenarios for school operators and senior leaders.

An increase in spending of 48% in 2016 over 2015 driven mainly by new brands entering the market.



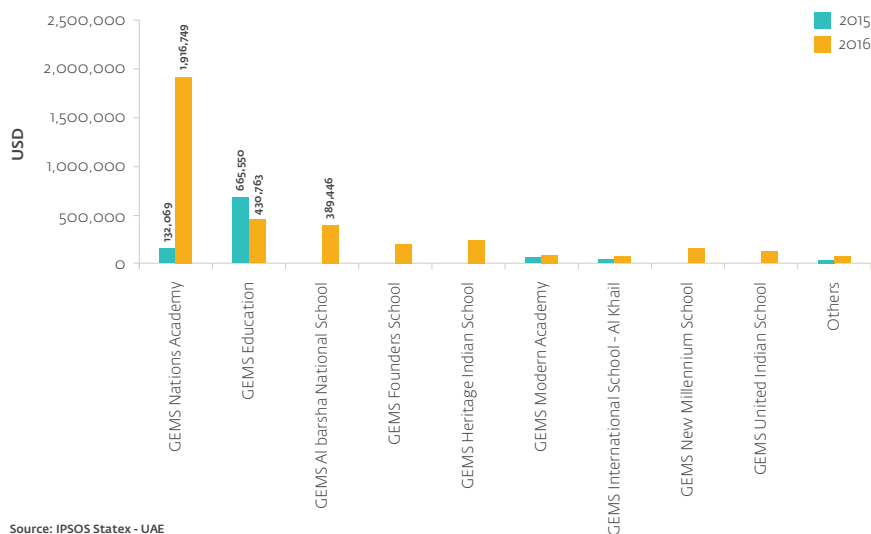
GEMS Nations Academy held a 13% share of school spending in 2016 with an investment of \$1,916,749. The fees at Nations Academy range from 84,000 AED for Kindergarten rising to 118,000 AED in Grade 8. Without any published data available on its enrolment numbers or digital marketing investment, it is difficult to know the accurate cost per acquisition. However, with the data available and some guesswork, it may be in the range of 46,000 AED – 70,000 AED per acquisition. Other new schools did not hold back on spending either:

- International School of Creative Science - \$1,112,576
- Sunmarke School - \$1,095,663
- Kent College - \$481,151
- American School of Creative Science - \$807,583
- Clarion School - \$273,100

The Competitive Landscape of School Advertising

GEMS Education Spending

GEMS Nation Academy had the biggest support which was launched in 2016

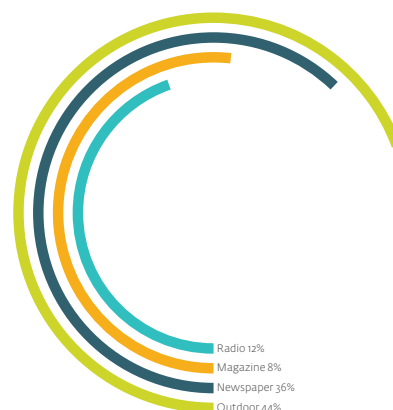


Outdoor accounted for 44% of Nations Academy spends followed by Newspapers with 36%

Multiple outdoor formats were used covering mainly Sheikh Zayed road with LED screens, Metro Station Wrap and DIFC LED screen.

Gulf News and Khaleej Times were the leading newspapers followed by Al Bayan, Al Khaleej and 7Days.

Virgin Radio, Dubai Eye and Dubai92 were the only stations used.



The second biggest spender in 2016 was The International School of Creative Science, which launched its Nad Al Sheba branch. It held an 8% share of all school advertising spending. Interestingly, 97% of its spending was on outdoor advertising, specifically lamppost advertising (\$628,578) and bridge banner advertising (\$258,590).

Sunmarke School, part of Fortes Education, opened in September 2016 was the third biggest spender with a 7% share of the school advertising market. Sunmarke's campaign was slightly more diverse than the others but it still heavily invested

in outdoor advertising, with budget invested into LED screens, MUPIS and bridge banners. Kent College, the sister school of Kent College Canterbury, which opened at the same time, also heavily invested in outdoor advertising with 96% of the budget focussed on this area.

The death of 7 Days signals a shift in the media landscape of the UAE. Schools in the past have relied on 7 Days to advertise events and some editions of the newspaper were crowded with adverts from schools.

The Competitive Landscape of School Advertising

The challenge of recruiting children whilst existing schools re-load and re-brand means that new schools entering the market really do have to be different and exceptional. The early 2017 data suggests that schools aren't spending as much

on traditional forms of advertising compared to previous years or they are delaying their spends due to the current market conditions.

JANUARY AND FEBRUARY LEADING BRANDS

Brand	Share	February
Amity School Dubai	\$ 193,764	13%
British Orchard Nursery	\$ 128,611	9%
Dubai English Speaking School	\$ 79,082	5%
Hartland International School	\$ 73,876	5%
Pace International School	\$ 49,159	3%
Mayoor Private School	\$ 39,289	3%
Credence High School	\$ 34,782	2%
Jss International School	\$ 34,651	2%
City School	\$ 34,274	2%
Amity International School	\$ 33,579	2%
Habitat School	\$ 30,696	2%
Gems Nations Academy	\$ 28,869	2%
Delhi Private School Dubai	\$ 28,826	2%
City School	\$ 27,220	2%
Regent International School	\$ 26,997	2%
Stonehill International School	\$ 24,784	2%
Buds Public School	\$ 24,498	2%
American School Of Creative Science	\$ 24,389	2%
Al Ansar International School	\$ 21,952	1%
Leaders Private School	\$ 20,769	1%
Others	506,192	35%
Total	\$ 1,466,259	100%

Amity School is the leading spender in January and February 2017.
7 out of the top 20 spenders are new brands

The frightening aspect of the early 2017 spends is the unknown piece –that it does not include any digital spending. We know that online advertising for schools has emerged as a critical priority for senior leaders. In the rush to register children in September, 2016, we know that certain operators and schools were paying up to \$250 per click on Google on certain days and

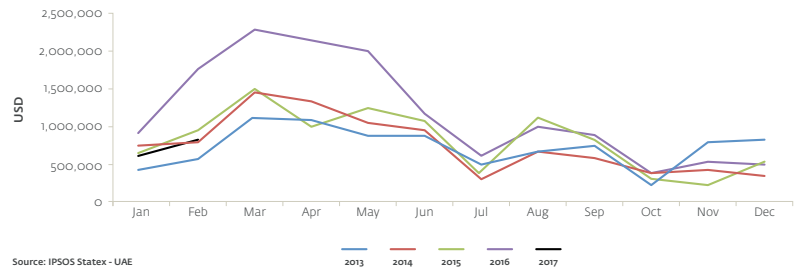
times, which correlated to around \$40,000 for the month. Although this spend was seasonal, it highlights the pressures that some schools are facing to recruit children. If we take into account all of the other digital platforms that schools are using, the actual marketing spend is significantly higher than has been tracked and recorded here.

The Competitive Landscape of School Advertising

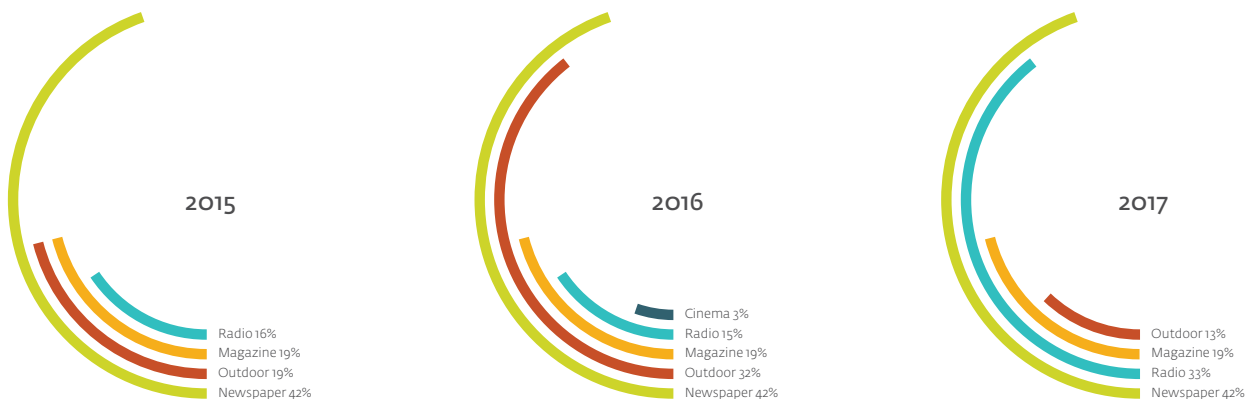
2017 Published Spending versus Previous Years

As the school enrolment season becomes more competitive, the schools that have streamlined the most effective admissions processes with collaborative work flows between marketing, admissions and the education teams will be the best positioned to recruit more students for the following academic year without the pressure of spending as much on advertising. New schools do not have this luxury, as they are forced to invest in marketing in the early stages of their operations to attract parents.

Spending peaks between February-April and drops during the summer period
- Jan & Feb 2017 a drop in spending in traditional advertising spending when compared to previous years.



January and February 2017 saw a large increase in the Radio share of spending at the expense of outdoor



Source: IPSOS Statex - UAE

Conclusions

The school advertising climate in Dubai is very competitive. Traditionally schools have spent heavily on outdoor advertising but the composition of where schools spend is shifting towards radio and digital channels. Details of digital are not published but from our own research we know that schools are investing in Google search engine marketing (SEM), Facebook advertising and school review websites such as WhichSchoolAdvisor.com and Schoolscompared.com.

Every school needs to have a distinctive message and a dynamic digital presence. Based on the amounts being invested, it is imperative that schools have digital platforms that are fit for purpose and designed to propel parents through the website, deliver a strong message that compels and entices parents to contact the school. The absence of a distinctive message might result in disengaged parents from the outset. Our evidence suggests that parents are shopping around before the enquiry stage which means that schools need to look further up the admissions funnel to engage them.

Once parents have responded to an advert or a recommendation for a school, the logical next step is to view the school's website and to analyse their education message in greater depth.

The Mystery Shopper Survey

The data within this report is the sum of the findings of a selected group of parents in Dubai, the UAE and mediated by our team at the Education Intelligence Group. The parents were part of the pre-planning process and the details of their approach to mystery school shopping was discussed within the context of time, space and place. We know that this report is a snapshot in time and it not reflective of a school overall. The report is not questioning the education that these schools offer. It is questioning the level of service they offer parents who have not yet signed up to their schools.

In the pursuit of collecting the data within this report, the parents used the same matrix. The data and feedback was then moderated so that we could compare the ratings given to schools. The process was quality assured to ensure that the observations and comments were standardised.

The schools that were selected for this report were placed into three categories:

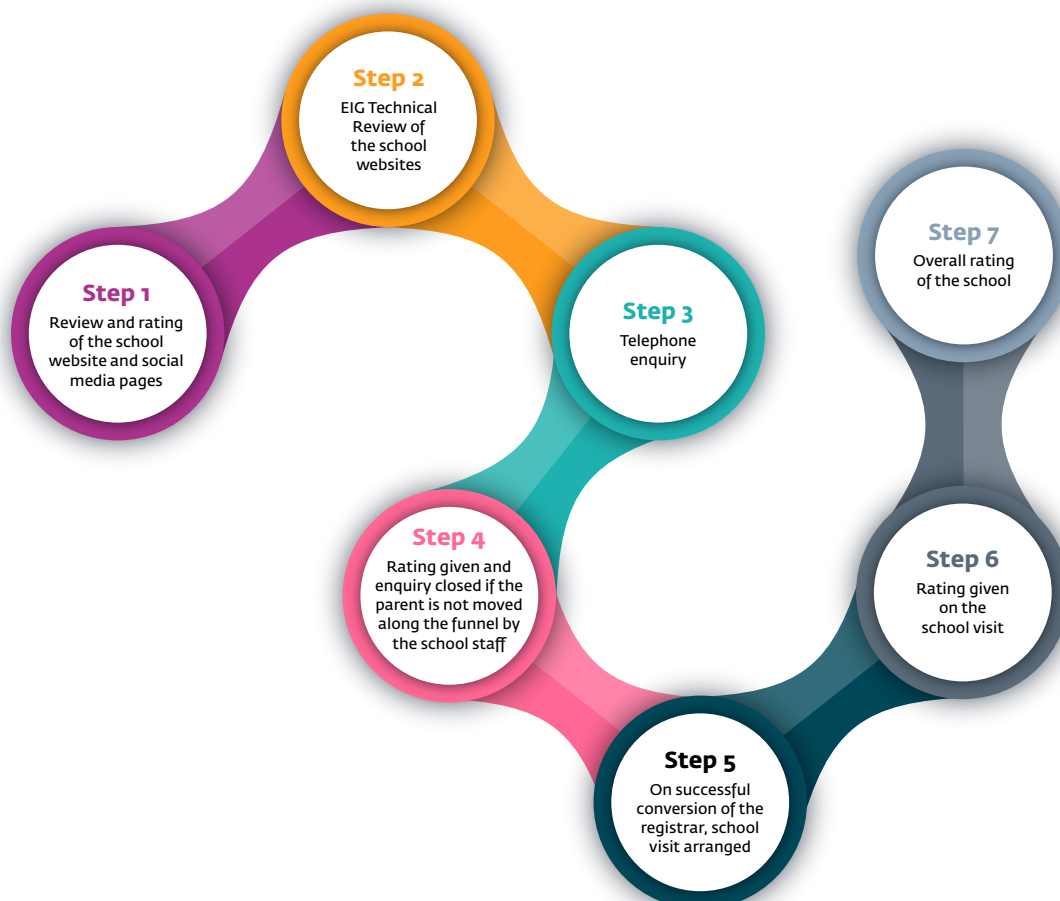
- New Schools – schools that have less than 2 years of

completed operations.

- Competitors – schools that have completed 2 years of operations but have less than 5 years of operations.
- Established -schools with over 5 completed years of operations.

This report provides a snapshot of the admissions landscape in Dubai's premium schools. When a parent enquires to a school, this interaction may be the deciding factor that influences a parent's decision to pursue that school for their children. It might be the only chance the school has to convert that family into a registered child. This report provides a glimpse of the successes and failures of schools throughout this process.

The schools that were contacted are not named in this report. We recognise that this data is sensitive and schools are adjusting to the current environment. We wanted to analyse the bigger picture based on the school's advertising spending, website design and messaging, the quality of the telephone interactions and the quality of the visits. Our parents followed a specific process which is outlined in the graphic below.



The Quality of the School Websites

The quality of school websites has evolved in recent years in Dubai. Due to the changes in other industries, schools have been forced to keep up with digital trends and online behaviour so many school websites are designed to engage users from the outset. As digital advertising is critical to a school's success, the importance of having a website that is fully optimised is an absolute necessity.

It's now important for schools to leverage digital marketing with intelligent online content and messaging. Twitter use for schools and businesses to other professionals has been the norm for some time now, but content around key school values and messages is quickly becoming the essential for schools in Dubai across all other digital platforms. What is more, we cannot simply cookie cutter the methods used elsewhere as the context and competitive environment of Dubai and to a lesser extent other emirates is very different from elsewhere.

A senior leadership team in Dubai needs to know the impact of their website design and the traffic metrics that inform a customer's journey. These metrics are critical to understanding the top of the admissions funnel. A comprehensive understanding of how website traffic works is a must for tomorrow's leaders, as the landscape increasingly demands school leaders who acknowledge the importance of the current trends of school marketing. This is both art and science combined.

In years past, schools in Dubai would market themselves using very traditional methods – a billboard outside of a local housing community with a very simple statement like "Admissions now open" or door drop leaflets or door hangers delivered with a local newspaper, or even a sandwich board located in a popular residential area.

As part of the mystery shopper report, we asked the parents to review their selected schools website and social media channels and to comment on the following:

- How distinctive is the messaging?
- Is there a clear call to action across the social media channels?
- How engaging is the content?

How did the parents rate the school websites?

The results were generally very optimistic and the parents' comments about each school were very positive. Commenting on School C, our mystery shopper said "The website is very clear and the message is strong" and similarly commenting on School H, our mystery shopper reported "The school had clear messages on Facebook and

the website". The only negative comment about the school websites came from our shopper in relation to School D "The school does seem to have social media pages although it is not very active".

The technical competency of a school's website is just as critical as the education message. It's important to question whether a school message is being hindered because of the technical limitations of a website if the message isn't engaging an audience.

For example, a school may have a very distinctive message but their website might not be mobile friendly, or the page speed may not be suitable enough for their users. Or, the vast majority of their parents may be using a certain device to view the website on, and their website may not be designed in-line with the conventions of this device.

School B "From the Facebook page and the website, the main message is about getting in touch. The website is interesting and gives a good first impression of the school"

The Quality of the School Websites

The Education Intelligence Group Technical Review

As an extension of this exercise we reviewed the technical capacity of all of the schools in this report and looked at their websites in greater detail to see if they are technically limited. The ratings are on a 1-10 scale for each of the core areas:

Accessibility - How accessible is the website is to people with disabilities, users on mobile phones and other devices.

Content and Experience – What is the quality and volume of content in this website.

Marketing - How well this website is marketed online. This includes Search Engine Optimisation (SEO) and social marketing

Page Speed

- **Load time** - How long, on average, do the webpages take to load completely
- **Response time** - How long, on average, do the webpages take to respond (i.e. to start to load).
- **Technology and Code Quality** -How well is the website designed and built

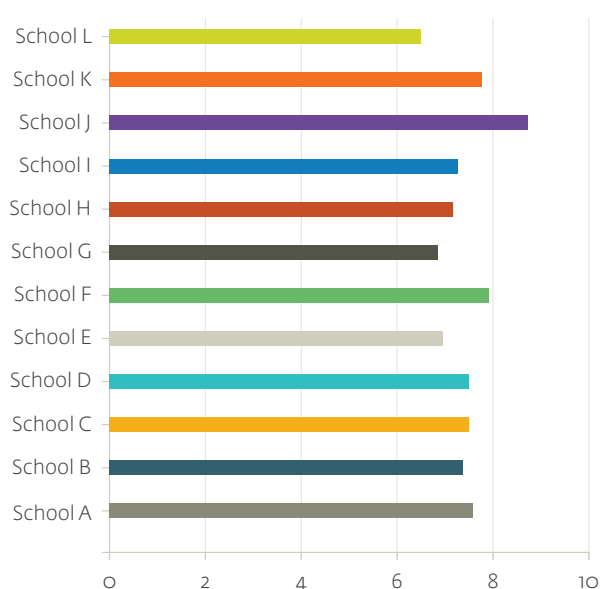
Overall Website Rating

This takes into account all of the factors above plus an additional 15 technical factors including but not limited to:

- Readability
- Search engine results
- Social interest
- Popularity

How well are the schools' websites performing?

Accessibility

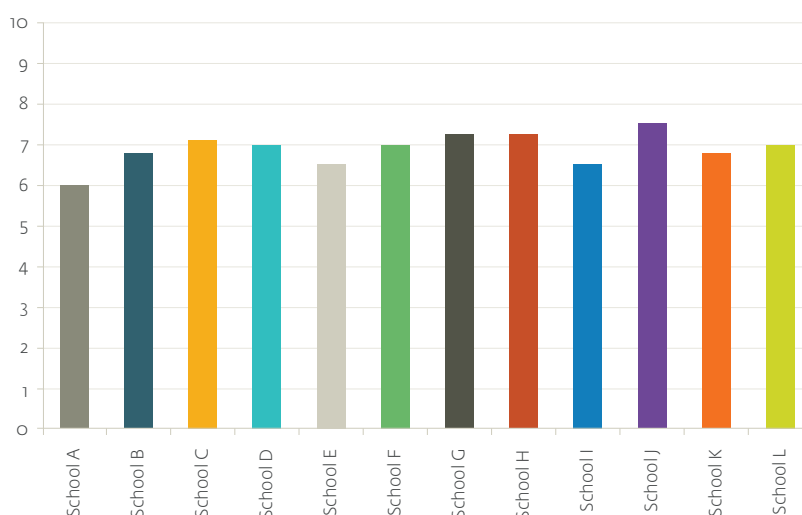


In terms of accessibility, all of the schools are mobile friendly and accessible for people from different devices.

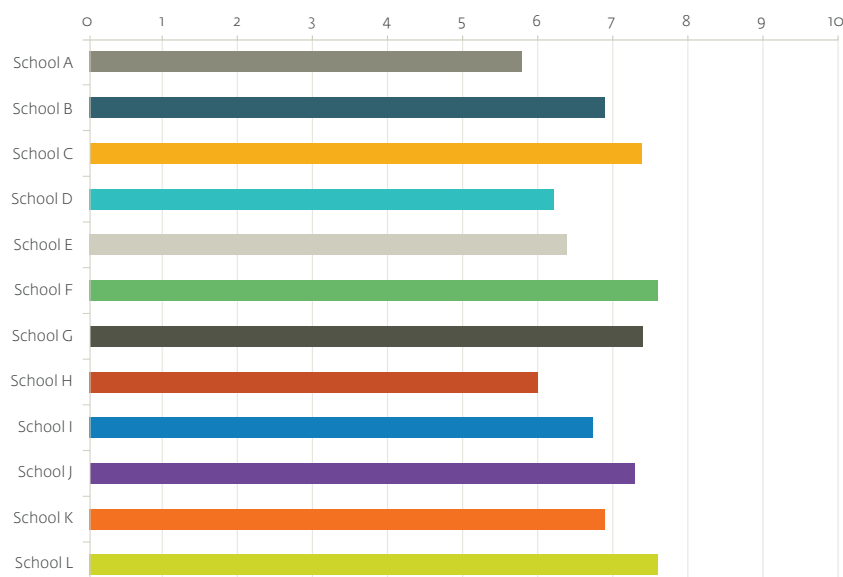
The Quality of the School Websites

What is the quality of the users' experience?

Experience



Marketing

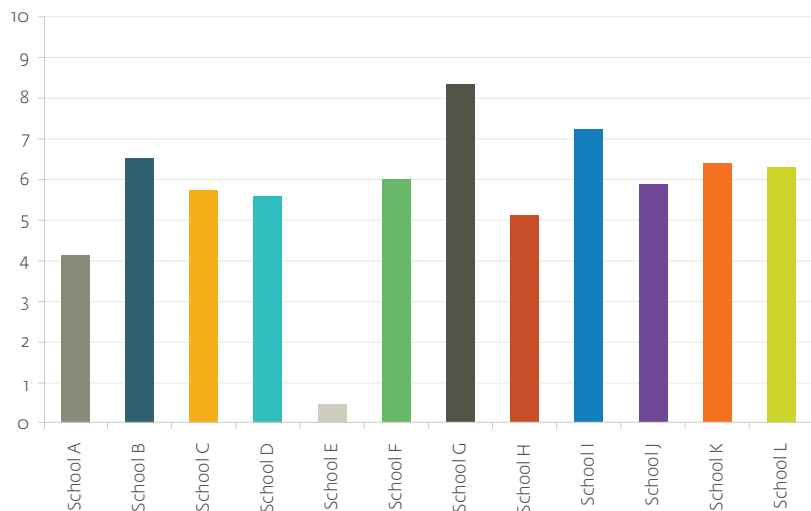


The Quality of the School Websites

How well are the schools performing from a technical perspective?

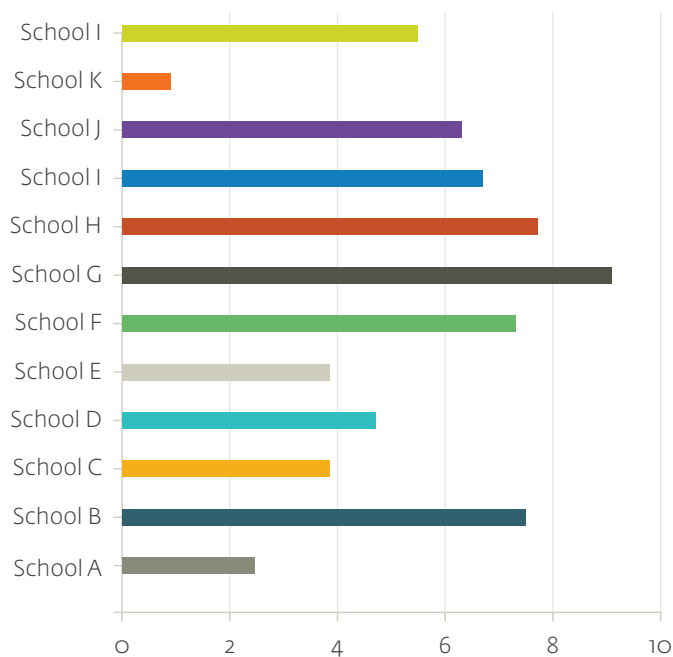
The quality of the coding and website designs leaves a lot to be desired. Three schools were not reviewed highly at all in this category.

Technology & Code Quality



“If a school website takes too long to load and the response time is slow, parents will lose interest and move on very quickly. Schools A and K are potentially losing prospective parents before they have even considered the school because the quality of their website development means that they are technically limited.”

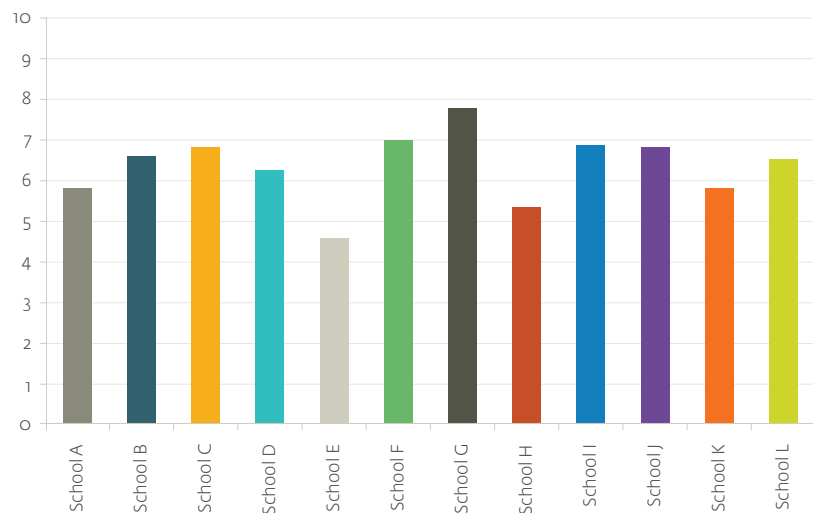
Page Speed



The Quality of the School Websites

In what ways are schools digitally prepared for discerning parents shopping around at the top the admissions' funnel?

Overall Score for the Website



School Type Comparison



New schools are leading from the front with their digital expertise.

Conclusions

The results suggest that some schools are taking their digital presence very seriously. The highest ranking school (g) is only in its second year of operations. The second highest ranking school has not been open a full academic year yet. New schools generally outperform more established schools and competitors. Some of the competitor schools are not performing digitally and they may have entered the market with habits that reflect an admissions model of the past. Although nearly all of the schools received positive comments about messaging from our parents, it is clear that the same schools are limited technically in how they are presenting that message. The page speed and the quality of coding might be hindering certain schools' abilities to convert interested parents into strong leads.

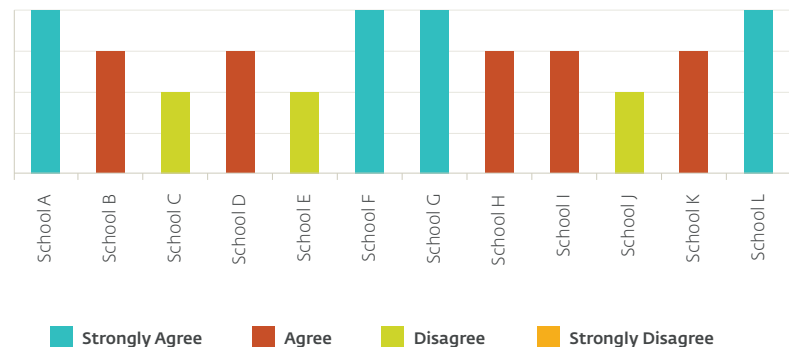
The Quality of Telephone Interactions

How successful were the schools in their telephone interactions with parents?

The mystery shoppers used the same matrix to judge the quality of the telephone interactions they had with the school staff. The parents did not follow a script of questions but they were given the task of questioning the school with the purpose of enrolling their child. The results of the telephone interactions shed some light on how schools treat the importance of this.

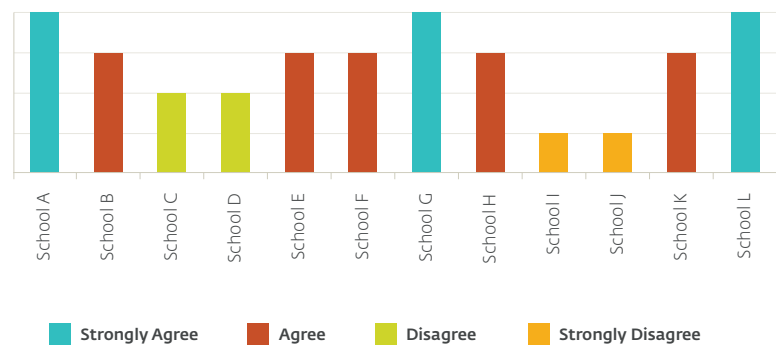
I spoke to admissions directly and none of my questions were answered and I was told to check the website

I was transferred to the admissions department in a timely and friendly manner



The registrar was very helpful, very knowledgeable and arranged a personalised tour. She took my contact details straight away

The registrar/admissions assistant was friendly and polite

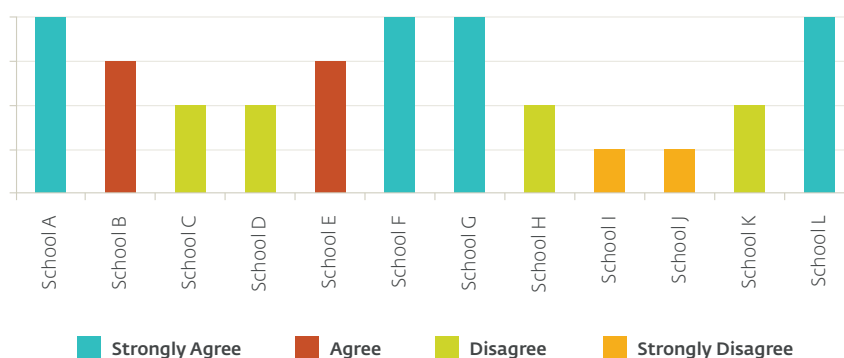


The Quality of Telephone Interactions

How successful were the schools in their telephone interactions with parents?

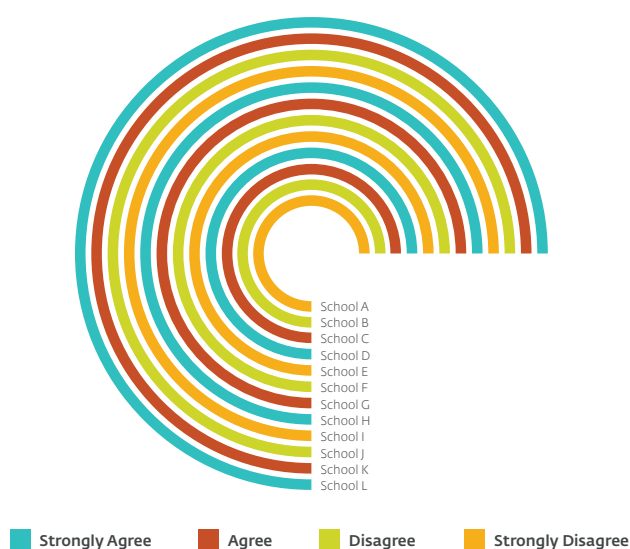
I did not speak to Admissions on my telephone enquiry, reception took all of my details and I received a call a week later by Admissions

The registrar/admissions assistant answered all of my questions



I spoke directly to the registrar and she spoke very passionately about the school

The registrar/admissions assistant was informative

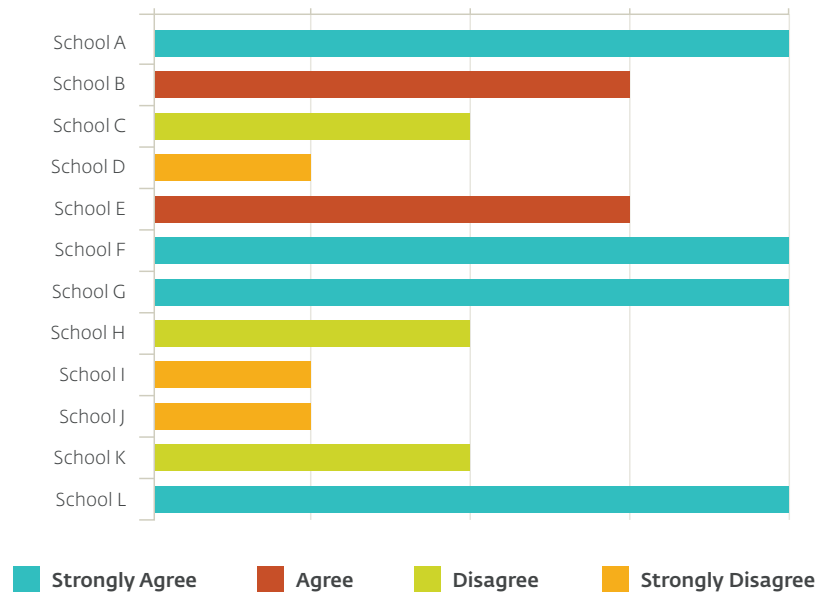


The Quality of Telephone Interactions

How successful were the schools in their telephone interactions with parents?

I was invited in the next day for a tour and it was explained that I would be met by someone else. I then received an email to confirm the appointment

The registrar/admissions assistant was clear about the next steps and invited me for a tour or appointment



The registrar/admissions assistant took my contact details

The registrar was informative but never asked for my contact details



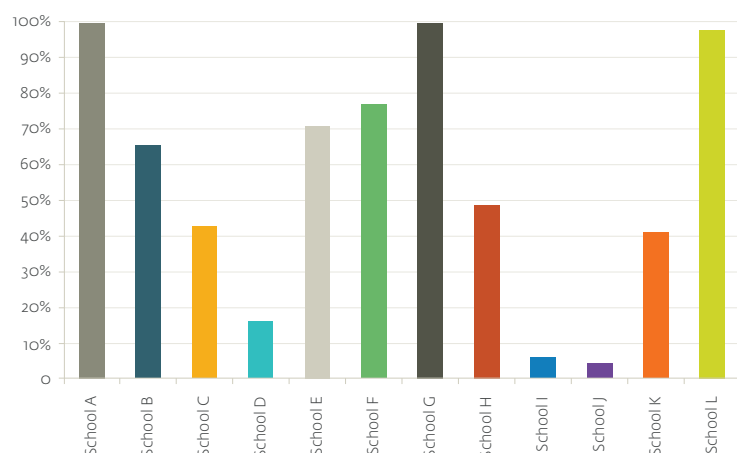
The Quality of Telephone Interactions

How did the parents rate the schools on the telephone?

Four of the schools were very strong in their management of the interactions on the telephone. The parents who called these schools noted their efficient handling of their enquiry, the friendly approach by the registrar and the admissions team and the ability to move these parents from being interested to being strong potential parents of the school. These schools were efficient, customer focussed and aware of the importance of each communication and the handling of data. Commenting on School G, our mystery shopper reported "A tour of the school was offered and arranged for the following week. An email tour of the confirmation was received the next day, a reminder email and call before the tour". School A and School L were noted for their flexibility and listening skills and responding to the parent's needs.

At the other end of the spectrum, some schools such as Schools C, D, I, J and K, were not rated as highly by our parents. In our scoring matrix, these schools are deemed complacent and 'at-risk' in their treatment of parents in the quality of their telephone interactions. In three of these cases, the schools did not take the contact details of the parents and did not offer a school visit or appointment. As such, these enquires were shut down at the telephone stage and the parents did not move long the admissions funnel. In these cases, the registrars were not rated as friendly and informative and the parents felt like they were not treated with respect.

Overall Telephone Rating Scores



School Type Comparison



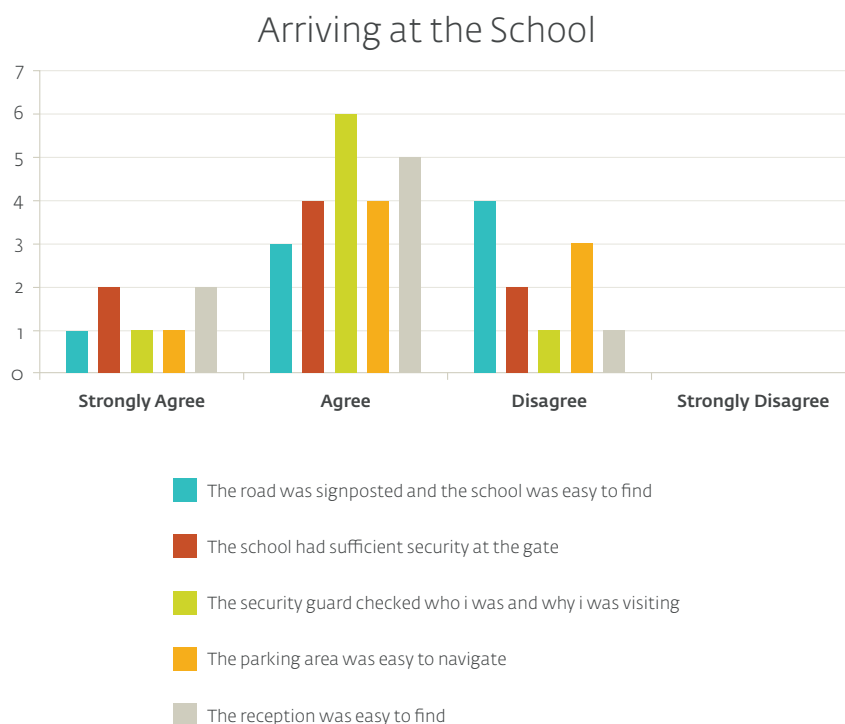
“New and Competitor Schools are leading the pack in terms of customer service. Established schools have a long way to go to improve the quality of their telephone interactions”

The Quality of School Visits

How did parents rate their school visits?

We asked our mystery shoppers to review their arrival experience, the ease of access, parking and security; the hospitality and welcome to the school, the interactions with the registrar and key people, the communication of the education message and we asked them to give an overall rating of the experience.

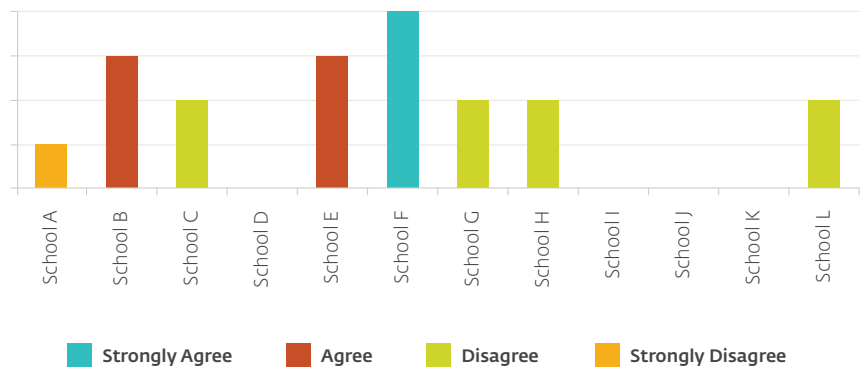
It is important to note that all of the schools who were visited are defined as 'premium' schools. Therefore, we feel that parents should be given a very welcoming and warm experience of the school that leaves them wanting more. In other industries, when consumers weigh up their choices, they are treated with respect and they are offered a high quality service.



The Quality of School Visits

Hospitality and Welcome

I was offered a drink free of charge



I was really impressed with the initial phone call. However, on arrival I had to complete information that I had already provided.

Many schools have coffee shops in their reception areas. Prospective parents are often left in these areas waiting. In 5 of the schools visited, the parents were not offered a free drink whilst they were waiting. The receptionist is often the first or second point of contact during a school visit. The arrival process should be smooth and efficient. Our mystery shoppers report that four of the schools explained what would happen when they arrived and then transferred them to the admissions team. Four school receptionists did not explain to parents what would happen and the arrival process was described as 'sloppy'.

The reception area displayed information about the school

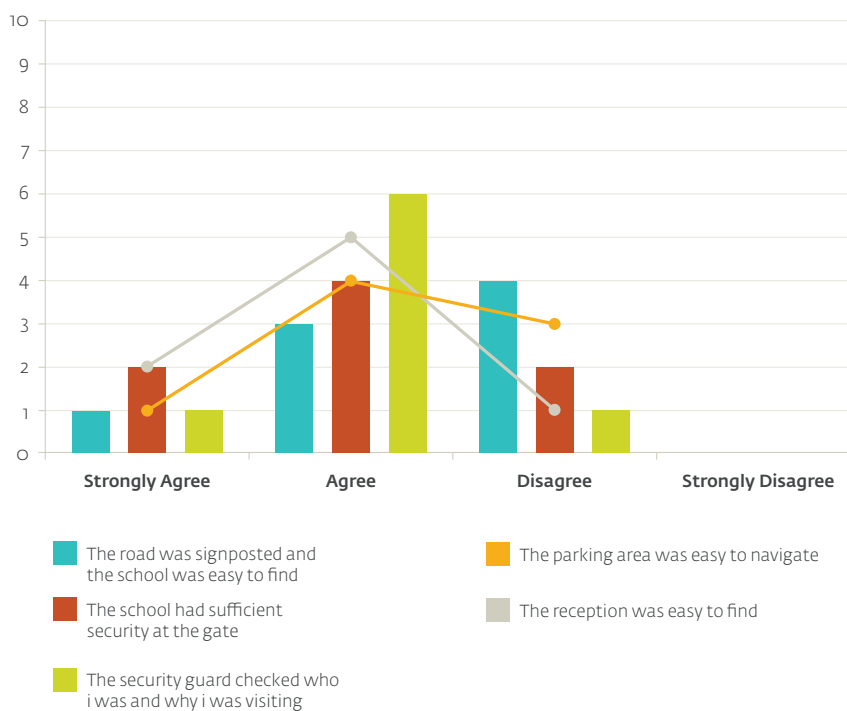


I noticed glaring errors in the grammar in the display work for English

The Quality of School Visits

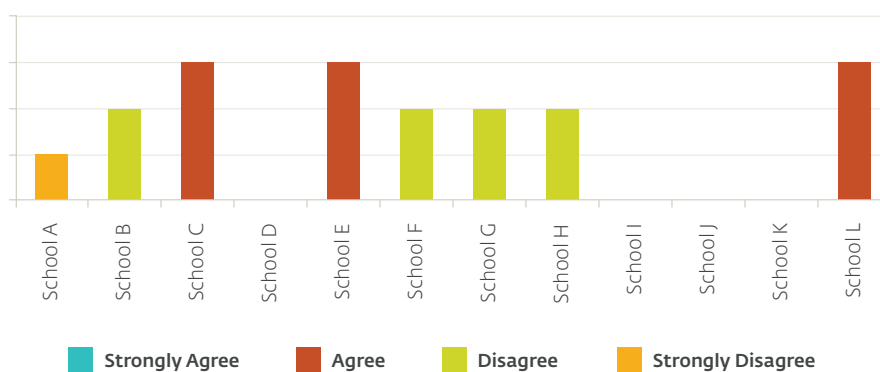
The Parents' Overall Rating of the Experience of Arriving in the School

The Parents' Overall Rating of the Experience of Arriving in the School



How well did the registrars perform with the parents?

The registrar knew my child's name and year group



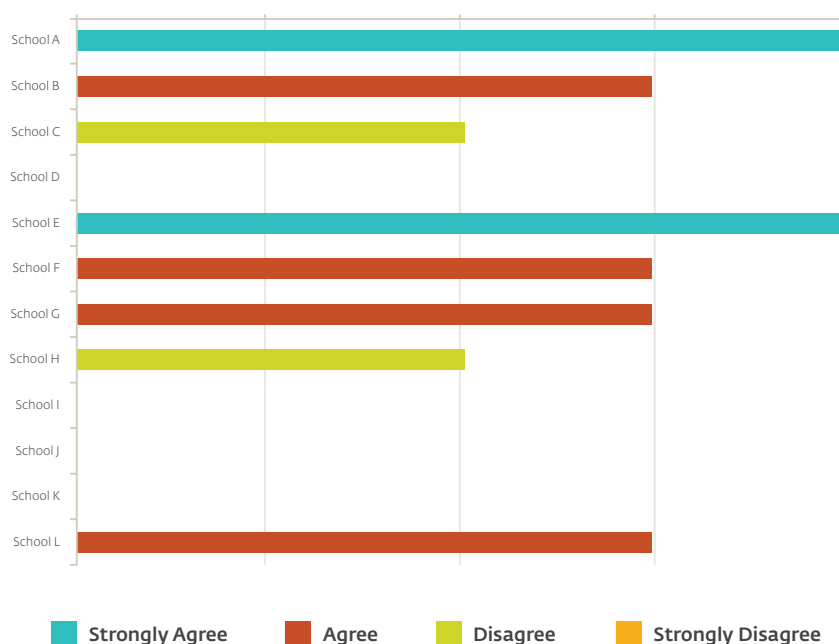
“They never asked my child's name, year group, or what they enjoyed doing so as a parent I have no idea what they could offer my child”

The Quality of School Visits

The Parents' Overall Rating of the Experience of Arriving in the School

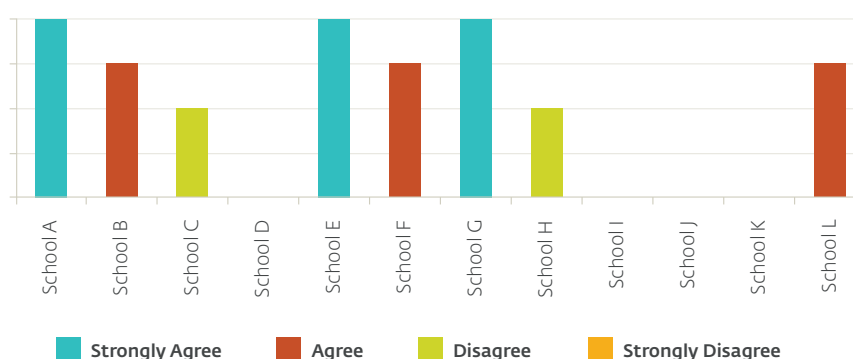
“I was really impressed. I got to see the classes happening and to observe the children. The classrooms were decorated with the children's work beautifully”

The school ethos and educational message was clear and coherent



“All questions were answered by admissions but I am yet to receive a follow up call after my visit”

The registrar was very persuasive about the school

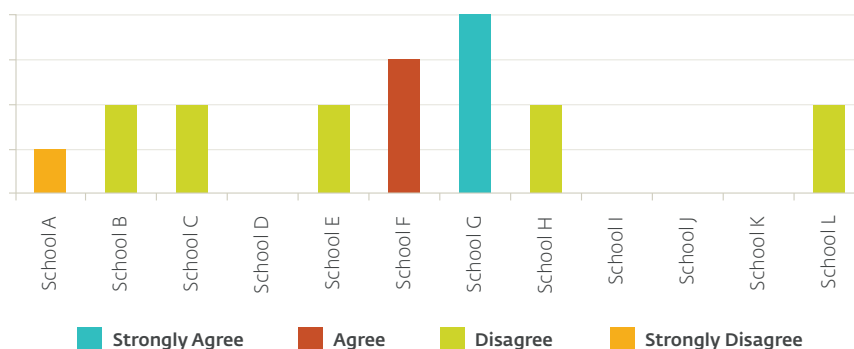


The Quality of School Visits

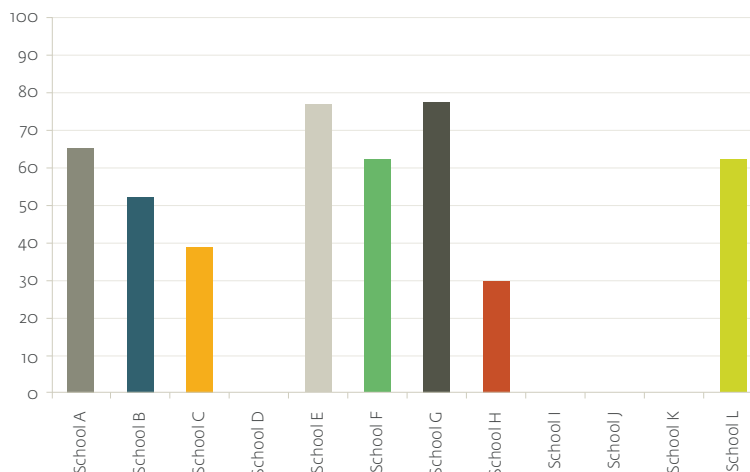
The Parents' Overall Rating of the Experience of Arriving in the School

“The tour was not good, the registrar was not helpful and at no point did I meet anyone from the education side of the school. I was rushed around the school and not even shown where my child would be”

The registrar was very keen to book an assessment for my child.



Overall Rating of the School Visit with the Registrar



“The data from the school tours and appointments suggest that Schools A, E, G and L have very competent and persuasive registrars, that represents 33% of the schools we visited in total.”

Conclusions

The data from the school tours and appointments suggest that Schools A, E, G and L have very competent and persuasive registrars. These four schools are evenly split between new and competitor schools. School C and H did not perform on this occasion with the mystery shopper rating them below average. Nearly all of the school's performed well in communicating their education message. In five of the schools visited, a member of the senior leadership team met with the mystery shopper and accompanied them on the school. At EIG, we recognise the importance of this so that parents can meet someone from the education team who will be responsible for their child. From the five school's that did this, two of the schools were rated as below average in their persuasive ability and one of the principals was noted for her negative attitude towards the parent. The other three schools were rated very highly in this aspect of the process, and all of the senior leaders knew the individual children's names so the interactions appeared meaningful.

The Overall Performance of Schools

Overall School Ratings

These areas are weighted so that we can take a holistic view of a school's performance. We also analyse the data on an individual school level and in each aspect of the admissions funnel. We combine this to take an overall view of how this set of premium schools performed.

The Headlines

42%

of the mystery shoppers agreed that the school focusses on their individual needs as a parent

50%

of the mystery shoppers said that listened to their questions and responded with relevant information

67%

of the school's communicated a strong education message

58%

of the mystery shoppers disagreed that the school paid attention to detail in all of its communication

50%

of the mystery shoppers said that the school's communication was excellent throughout the process

66%

of mystery shoppers would not be interested in registering their own child for the school

67%

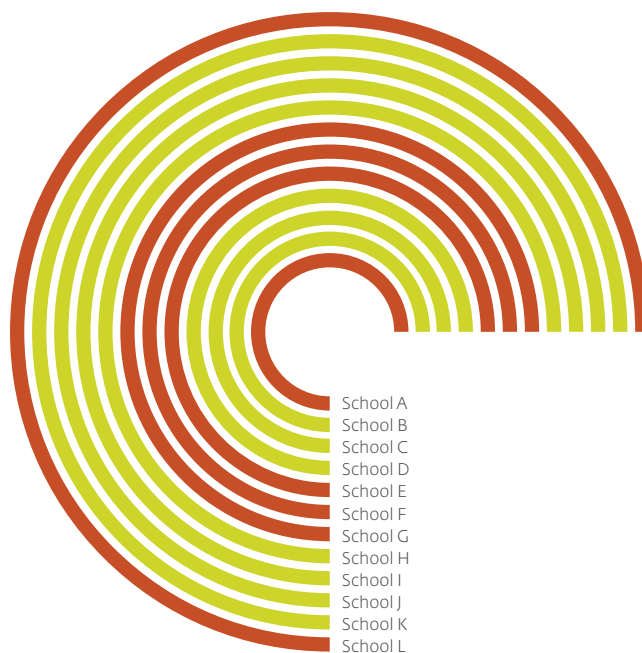
of mystery shoppers would not recommend the school to a friend

The Overall Performance of Schools

Overall School Ratings

The School Focussed on my individual needs as a parent

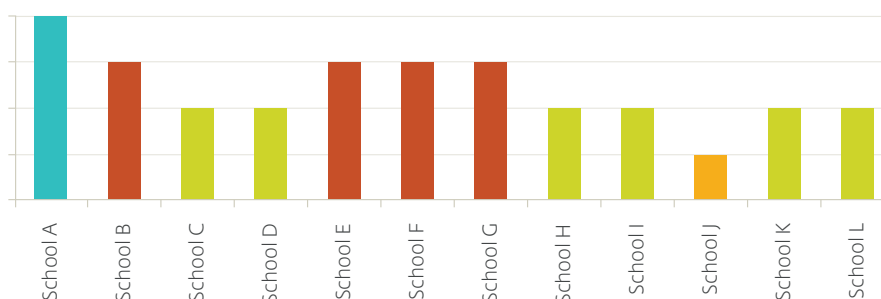
None of the mystery shoppers perceived that the schools focussed on their individual needs as parents.



Strongly Agree Agree Disagree Strongly Disagree

School J did not perform well on this occasion. What would the cost of this performance mean with a real parent?

The school paid attention to detail in all of its communication



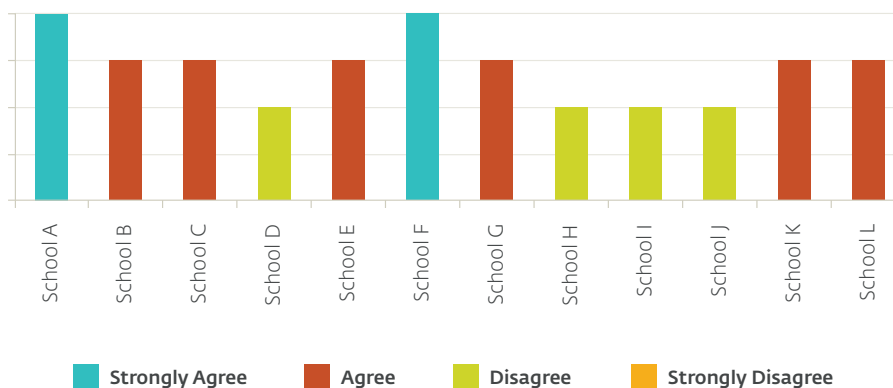
Strongly Agree Agree Disagree Strongly Disagree

The Overall Performance of Schools

Overall School Ratings

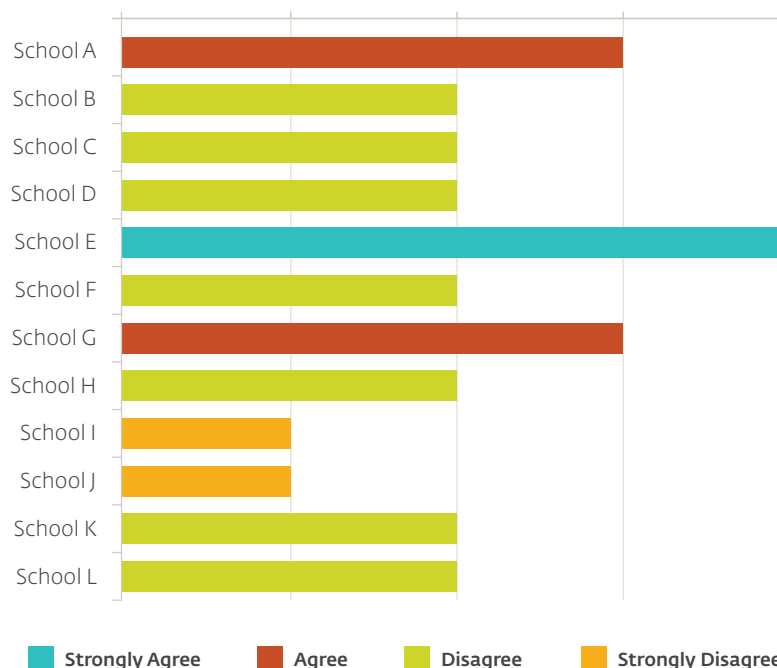
School A and F were very strong in their communication of their ethos and education message.

The school communicated a strong ethos and education message



Despite the fact that all of the schools are premium schools and the mystery shoppers match the demographic profiles of the parents, very few would be interested in registering their child for the school. Schools A, E and G performed well in this category. We know that this is a very personal decision.

I would be interested in registering my child for the school

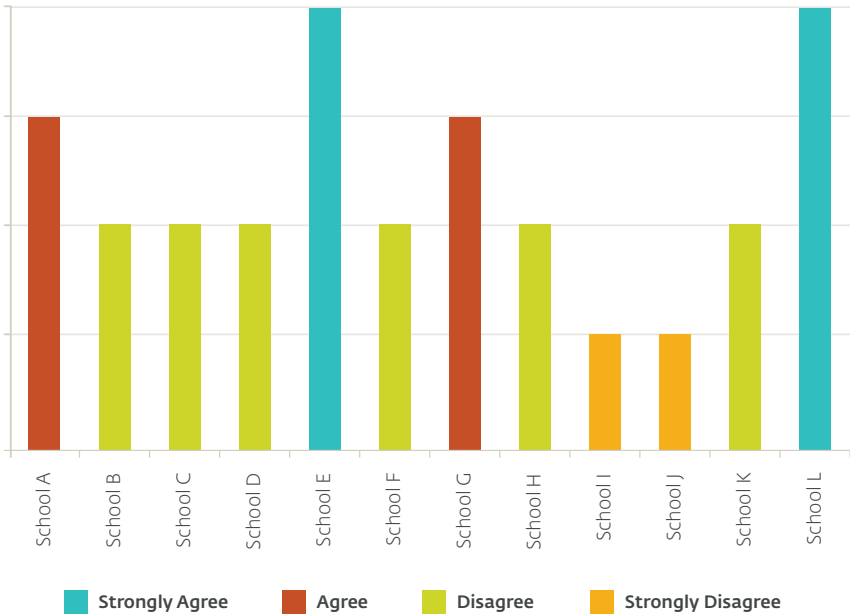


The Overall Performance of Schools

Overall School Ratings

We think this is probably the most important question that you can ask a customer. This is especially so for schools where the decision is so large, and parents look for affirmation of their gut instincts. Sending your child to a school is a very personal decision but recommending a school isn't. If you are willing to recommend a school, you are effectively endorsing it. Once again, Schools A, E, G and L performed very well in this category.

I would recommend the school to a friend

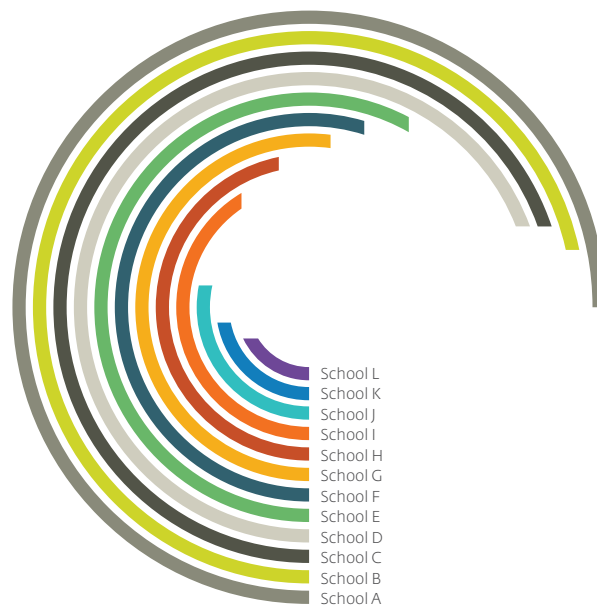


The Overall Performance of Schools

Overall School Ratings

We have analysed the data at each aspect of the admissions funnel. To arrive at an overall score for each school, we have weighted the indicators from the telephone interaction stage through to the overall ratings of parents. This provides us with an overall, school by school rating.

Overall EIG Score



We have also analysed the different school types and how they have performed in relation to their maturity and experience in the market.

School Type Comparison



Conclusions

The data across the different aspects of the admissions funnel indicates that some schools perform very well in the areas that matter most. Schools A, E, F, G and L outperformed all other schools. Two of the schools are new schools with less than two years of operations completed and two are competitor schools. Two other new schools did not perform well throughout the process which brought the overall rating of the new schools below the competitor schools. Established schools did not perform well throughout the process. This might be a result of their perceived comfort in the market or it could be for other reasons. The established schools are the most at risk of losing new parents due to their admissions processes.

The Implications of this Study

This report is a snapshot in time. The data was collected by mystery shoppers who were tasked with making judgments about school admissions processes. The schools that performed the best in this study were focussed on providing a high quality service to prospective parents. It is clear that the more established schools are still operating in a way that made them successful in the past but those practises may be in need of a systemic review if they wish to maintain their pipeline of prospective parents.

Schools A, E, F and G outperformed their competition within the premium segment of the Dubai education market. Interestingly, schools F and G have the highest performing school websites which suggests that they are analysing every aspect of the admissions funnel. Schools D, I, J and K did not perform throughout this process which suggests that there are gaps in their admissions process and these schools might be complacent about their position in the market.

The data from this report also highlights the importance of the registrar and the role they play in the admissions process. The skill set of today's registrar is dynamic and fluid. Registrars need to be competent with data, persuasive in their communication, systematic in their approach to customer service, responsive to parents' needs and sales orientated in their pursuit of prospective parents.

Whilst the role of the registrar is critical, senior leaders and principals ultimately hold absolute responsibility of recruiting parents. Very few of the schools used a member of the senior leadership team to meet with the mystery shoppers to tour the school. The ones that did were recognised for this and their personal touch influenced the mystery shoppers' judgments.

The role of the principal in Dubai is constantly evolving; principals need to have a marketing and sales approach to the recruitment of parents which means they need to understand every aspect of the admissions funnel and be able to plan and respond to the implications of each.

This report consistently highlights that schools are generally secure in communicating their education message. It's what schools are familiar with. However, the unfamiliar and the unknown components may hinder schools from being in a position to communicate this message.

The Implications of this Study

67% of the mystery shoppers would not recommend the schools to a friend based on their experience of enquiring and interacting with the schools. The figure should be unsettling. Schools A, E and L all received recommendations. Schools rely on word of mouth and positive talk within the community.

58% of the schools took the contact details of the mystery shoppers during their telephone interaction. In 2017, premium schools in Dubai cannot afford to be as lacklustre in their management of data.

In light of the landscape of school advertising, this report should be a wake up call for all schools. The competitive climate will eventually punish schools that are complacent in their approach to marketing and admissions. Although this report is a snapshot in time, the performance of some of these schools suggest that complacency has already set in. A subset of these schools have recognised this, and they are beginning to compete for the market share of parents. Correcting their admissions processes from top to bottom is the first part of turning this around.

Recommendations

- Review all aspects of the admissions funnel starting with the internal messaging about the education offered and how this is articulated by the team in casual situations;
- Analyse your school website and check for technical limitations that might be hindering the user engagement
- Identify your admissions funnel and assign an area of responsibility for each aspect of the funnel
- Invest in communications training for your senior leaders and admissions team
- Build a customer relationship management (CRM) system that tracks every aspect of the admissions funnel
- Personalise your approach to parents throughout the process and handle their data sensitively
- Build collaborative links between marketing, admissions and the education team. They should be able to question and check every aspect of the process
- Question the quality of parental interactions frequently to ensure that a quality service is being offered.

