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From Location to Collusion: The Heterogeneous Ways in Which Private Schools Navigate the Educational Marketplace[1]

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Abstract: The non-subsidized private school sector is a privileged landscape for assessing market theories' promises and assumptions. Unlike quasi markets with public-financed private schools, the fully private sector is a "purer market," where the price is expected to be determined by competitive dynamics, profit is allowed, and fewer regulations mold the schools' competitive actions. Drawing on interviews with 32 headteachers, we explore the competitive strategies private schools adopt in Chile to contribute to the discussion

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regarding the rationale of market-oriented policies and critically examine its limits. Our findings identify a typology of schools based on perceptions of competition and a broad set of competitive responses, including location decisions, market scanning, marketing, differentiation, and pricing tactics to attract and retain students. These practices focus not primarily on pedagogical issues but on symbolic aspects. Although some strategies mirror those observed in quasi-markets, they are distinguished by greater sophistication and a more business-oriented approach.
Keywords: educational markets; privatization; school competition; elite education

De la ubicación a la colusión: Las diversas formas en que las escuelas privadas navegan el mercado educativo

Resumen: El sector de escuelas privadas no subvencionadas constituye un terreno privilegiado para evaluar las promesas y supuestos de las teorías de mercado. A diferencia de los cuasimercados con escuelas privadas financiadas públicamente, este sector completamente privado opera como un "mercado más puro", donde se espera que los precios se determinen por dinámicas competitivas, se permite el lucro y existen menos regulaciones que condicionen las acciones competitivas de las escuelas. A partir de entrevistas con 32 directores y directoras, exploramos las estrategias competitivas adoptadas por las escuelas privadas en Chile, con el fin de aportar a la discusión sobre la lógica de las políticas orientadas al mercado y examinar críticamente sus límites. Nuestros hallazgos permiten identificar una tipología de escuelas según sus percepciones de la competencia, así como un amplio repertorio de respuestas competitivas que incluyen decisiones de localización, exploración de mercado, marketing, diferenciación y tácticas de precios para atraer y retener estudiantes. Estas prácticas se enfocan no principalmente en aspectos pedagógicos, sino en dimensiones simbólicas. Aunque algunas estrategias reflejan las observadas en cuasimercados, se distinguen por una mayor sofisticación y un enfoque más empresarial.
Palabras-clave: mercados educativos; privatización; competencia escolar; educación de élite

Da localização à colusão: As diversas formas pelas quais as escolas privadas navegam no mercado educacional

Resumo: O setor de escolas privadas não subsidiadas constitui um cenário privilegiado para avaliar as promessas e pressupostos das teorias de mercado. Ao contrário dos quase-mercados com escolas privadas financiadas pelo Estado, o setor totalmente privado opera como um "mercado mais puro", no qual se espera que os preços sejam determinados por dinâmicas competitivas, o lucro seja permitido e haja menos regulamentações moldando as ações competitivas das escolas. Com base em entrevistas com 32 diretores(as), exploramos as estratégias competitivas adotadas por escolas privadas no Chile, com o objetivo de contribuir para o debate sobre a lógica das políticas orientadas ao mercado e examinar criticamente seus limites. Nossos achados identificam uma tipologia de escolas com base nas percepções de competição e um amplo conjunto de respostas competitivas, incluindo decisões de localização, análise de mercado, marketing, diferenciação e estratégias de preços para atrair e reter estudantes. Essas práticas concentram-se não principalmente em aspectos pedagógicos, mas em dimensões simbólicas. Embora algumas estratégias se assemelhem às observadas em quase-mercados, distinguem-se por sua maior sofisticação e uma abordagem mais empresarial.
Palavras-chave: mercados educacionais; privatização; competição escolar; educação de elite

From Location to Collusion: The Heterogeneous Ways in Which Private Schools Navigate the Educational Marketplace

While theories about education markets have been extensively debated worldwide, most research has focused on school choice processes, the impact of the policies that foster competition on students' attainment, and its effects on segregation (Cordes, 2025). Less has been written about the behavior of the supply side (Zancajo, 2020). As a result, competition among schools has been treated as an inherent effect of the privatization processes (Linick, 2014) without sufficient empirical verification of its existence and magnitude (Powers & Marchetti, 2019). Thus, questions about which schools compete, how much, and in what ways remain unsolved, configuring a black box in the functioning of education systems guided by market notions (Waslander et al., 2010; Zancajo, 2020).

Despite the overall scarce research on supply-side dynamics, recent studies have examined schools' competitive behavior within education quasi-markets, which are hybrid spaces guided by market notions, with varying state regulation or control (Verger et al., 2020). These systems rely on the introduction of subsidized private (i.e., charter schools, *escuelas concertadas*, free schools, independent schools) in a framework of promotion of school choice and between-school competition (Zancajo et al., 2025).

While mixed findings are reported in impact-evaluation studies regarding the effect of marketisation policies on student attainment (Crawfurd et al, 2024; Epple et al., 2017; Jabbar et al., 2022), qualitative research about competitive dynamics in quasi-market scenarios has suggested that schools structure their competition around symbolic attributes rather than improving teaching quality, curriculum, or other core educational issues (Jabbar, 2015). The symbolic responses of the schools can be anchored in the parents' concern about the sociocultural composition of the school rather than pedagogical issues (Bunar & Ambrose, 2016). However, the type of responses the school displays also depends on its market position, perception of competition, the principal's knowledge about the market, and its motivation to compete (Holme et al., 2013; Jabbar, 2015). As research on the impact of competition has shown mixed results, understanding the mechanisms driving the action of the schools and the actions implemented by them in the educational marketplace has gained relevance (Jabbar & Creed, 2020).

Although quasi-market arrangements have adopted financing, provision, and incentive schemes resembling traditional markets, they are not entirely equivalent. Unlike purer markets, in quasi-markets the price is not driven by supply and demand dynamics. Conversely, it relies on a per-student public subsidy set by the educational authority, which also often restricts or eliminates tuition fees. Moreover, the responsibility of ensuring education provision is centralized (i.e., the state) and, in some cases, the entry of new providers is limited by existing public supply. Besides, private schools receiving state subsidies face regulatory or incentive frameworks that may inhibit, restrict or moderate private provider participation or competitive dynamics in a given territory (DeAngelis et al., 2019; Lubienski et al., 2009). Furthermore, education providers are rarely authorized to operate under profit-oriented schemes.

Research has provided valuable insights into the dynamics of competition in quasi-markets; yet questions persist regarding how schools navigate the marketplace when operating in a "purer market" where prices are determined by supply and demand, no default provider exists, and profit withdrawal is possible, which is commonly the situation in the non-subsidized private school sector. Some researchers have claimed that regulations shape the behavior of educational providers, and these factors could affect both their productivity (De Angelis et al., 2019) and externalities, such as segregation (Verger et al., 2020). Therefore, studying purer markets is relevant to understanding the

behavior of schools when facing competitive pressure and the functioning of the educational market itself in its different forms.

To address this gap, this article focuses on the non-subsidized private school market in Santiago, Chile. In contrast to many studies on competitive behavior in subsidized schools (Holm & Lundström, 2011; Kasman & Loeb, 2013; Jabbar, 2015), the non-subsidized private sector in Chile has not been addressed from this angle. In this context, the article examines the extent to which schools' principals recognize competitive pressure, and the strategies they implement to attract and retain students. Not only does this sector operate, in terms of regulations, in parallel to the quasi-market encompassing state-funded public and private schools, but due to the socioeconomically segregated landscape of Santiago city private schools tend to be concentrated in specific neighborhoods, which is expected to promote competitive dynamics (Misra et al., 2021). In addition to further illuminating "the black box of school competition" (Waslander el al., 2010, p. 20), the study seeks to contribute to understanding the complexities of schools' behaviors in the marketplace, how market theories in education are enacted in practice in a "purer" market scenario (Aurini & Quirke, 2011, p. 180) and to what extent their assumptions are fulfilled. Although our primary focus is competitive responses, we deliberately refer to "navigating the market" to acknowledge those complexities, which are not limited to reactions to perceived competition. As previous studies have stated, schools' behavior can drastically diverge from those suggested by market theories. For example, some schools do not identify competitive pressures or remain indifferent (Egalite, 2013).

We deem relevant to move the focus of analysis from publicly subsidized private schools to purely private ones due to three main reasons. First, this type of school is exclusively funded by parents, with per-student spending significantly higher than publicly funded schools. This suggests that their competitive strategies may be more sophisticated since there are more significant resources at their disposal. Second, this context allows comparatively greater freedom to establish particularistic educational projects and management strategies. For instance, not being subject to public student admission regulation could provide an opportunity for greater educational offer differentiation. Third, this institutional arrangement permits profit motivation. Given that schools' competitive dispositions and responses are influenced by their capacity and motivation to adapt to environmental changes, as well as their organizational cultures (Holme, 2013), it is expected that profit-seeking organizations will develop more aggressive competitive strategies than those without profit motives. In summary, exploring how schools navigate the market in a purer setting will shed light on the extent to which assumptions from education market theories and the findings from previous studies in quasi-market settings hold in contexts where public regulations have less impact on school operations.

This article is organized into five sections. First, we provide an overview of the literature on schools' competitive strategies in quasi-markets and the incipient research in the private sector. Second, we introduce the context of private schools in Chile, outlining their key attributes and the operating rules of this purer market. After describing the methods in the third section, we present the study's main findings in the fourth part. Finally, we discuss the findings and contributions of the article in light of assumptions of the education market theory.

Literature Review

School Competition in Quasi-Market and "Purer Market" Scenarios

Over the last decades, market-based mechanisms, such as school choice, deregulation, and competition, have expanded in school systems worldwide (Gutiérrez & Exley, 2025). This increasing

trend is based on strong assumptions about their potential for improving schools, in which main expectations suppose that in a competitive environment, schools experiencing market pressures will respond by enhancing their educational quality to maintain or enhance their market position (Chubb & Moe, 1990) while promoting innovation and diversification of curricular options according to consumer preferences (Lubienski, 2006).

The global introduction of incentives to school competition has resulted in extensive research on this topic. Most studies—mainly focused on the United States and lately expanded to low-income countries—have examined the effects of increased competition on school performance using various methods (Jabbar et al., 2022). This research has yielded mixed findings, which -when positive- are small and vary across contexts and policy designs (Epple et al., 2017; Jabbar et al., 2022). More recently, in response to the predominancy of outcome-based studies and the under examination of "how competition works" (Creed et al., 2021; Jabbar, 2016), an emerging body of research has begun to investigate "markets in practice" (Jabbar, 2015, p. 3). This literature has provided empirical evidence on how educational leaders perceive competition in quasi-market environments (e.g., Creed et al., 2021) and their responses to market forces (e.g., Jabbar, 2015; Zancajo, 2020).

Conceptually, schools' responses to competition have been categorized as substantial (i.e., concerned with the core educational activity, such as curriculum, teaching, etc.) and superficial or symbolic (i.e., concerned with promotional activities; Jabbar et al., 2022; Woods et al., 1998). The empirical research on this area has pointed out diverse practices developed by schools to tackle competitive pressures (Jabbar, 2015; Woods et al., 1998; Zancajo, 2020). Their enactment depends on the type and amount of perceived competition and the position of schools in the market hierarchy (Jabbar, 2015, 2016; Linick & Lubienski, 2013), as well as on the schools' resources, organizational capabilities, motivation and leadership (Holme et al., 2013; Linick & Lubienski, 2013). In summary, the multiple responses to competition have been classified as i) improving quality and performance, ii) differentiating the school offer, iii) marketing, screening or selection of students, and v) market scanning or research (Jabbar, 2015; Zancajo, 2020). Thus far, critically discussing market theory assumptions, most studies have found a tendency toward superficial (e.g., marketing and student selection) over substantive changes (e.g., academic), which divert schools' focus on core pedagogical issues and have implications for educational equity (Creed et al., 2021; Jabbar, 2015, 2016; Jabbar & Creed, 2020).

Among the array of schools' responses to competition, research has highlighted an increasing movement toward marketing activities—recently coined as "Edvertising" practices (Jessen & DiMartino, 2020, p.242)—to attract students (Greaves et al., 2023). Marketing strategies correspond to externally focused actions with a promotional orientation, representing a superficial rather than substantive response to market forces (Jabbar, 2016). Former studies on the advent of marketing practices in schools systematized by Oplatka & Hemsley-Brow (2004) revealed the lack of formal marketing planning in schools and the recurrence of ad hoc collection of information about the market environment driven by informal channels. Updating this evidence, a recent review of literature on marketing activities in quasi-market contexts -primarily focused on the US context- highlights a wide range of activities developed by schools depending on their market positions (Greaves et al., 2023). These practices gravitate between both traditional (e.g., brochures) and new sophisticated ones (e.g., online marketing; Holm & Lundstrom, 2011; Jabbar, 2015; Saura et al., 2023) and include activities such as participation in school fairs, posting or mailing flyers, advertising in the media or the use of signs or billboards, as well as the encouragement of word-of-mouth and the hiring of specialized marketing or branding consultants (e.g., Jabbar, 2016).

Besides highlighting the trend toward an intensification and diversification of marketing practices in response to competition, literature has shown that these activities are generally used "as an alternative to making substantive school changes" (Greaves et al., 2023, p. 21), are not focused on "hard" characteristics of schools (e.g., academic domain); Lubienski, 2006), and tend to be used to screen, select or exclude students (e.g., Greaves et al., 2023; Jabbar, 2015). Therefore, contrary to market theory assumptions, marketing responses have been discussed as strategies that do not comply with an informational role for parental choice (Lubienski, 2006), tend to distract schools' focus, efforts, and allocation of funding from pedagogical issues (Jessen & DiMartino, 2020), and contribute to segmentation and inequality within school markets (Greaves et al., 2023).

While the increasing attention to the study of schools' responses to competitive pressures has tested the assumptions behind the market approach, most studies have focused on the context of quasi-market environments fostered by charter school expansion and voucher policies in the United States (Jabbar, 2022). This scenario has tended to neglect the analysis of market theory assumptions in "pure markets" like private schools. These so-called "purer" market environments (Pizarro-Milian & Davies, 2017) are particularly valuable to be studied in school competition research for their combination of "all the ingredients central to market effects including direct funding by clients, survival based solely on clients' willingness to pay, and low formal regulation" (Aurini & Quirke, 2011, p. 175) or their more significant pressure to attract consumers for their for-profit making nature (Tah & Knutes-Nyqcist, 2022).

Incipient studies on these contexts have shown that—in coherence with the diversity of the private school sector—the competitive pressures experienced tend to be differently acknowledged. While some schools seem to be unaware or immune to competition (Aurini & Quirke, 2011; Egalite, 2013; Forsberg, 2018), others are challenged by these new scenarios (Aurini & Quirke, 2011; Maxwell & Aggleton, 2016) or other tendencies, such as demographic change (Forsberg, 2018). When schools feel competitive pressure, they tend to respond with strategies such as a reconversion of their differentiation markers (Maxwell & Aggleton, 2016), the expansion of their product/service lines (Aurini & Quirke, 2011), or the introduction of new forms of advertising (Aurini & Quirke, 2011; Forsberg, 2018).

A specific topic of research among private schools' studies—primarily elite ones—is their marketing strategies and the exclusivist discourses they disseminate on brochures or websites (e.g., Pizarro Milian & Quirke, 2017; Tah & Knutes-Nyqcist, 2022). Besides, research on this area has illustrated both the sophistication and further corporatization of marketing practices within this circuit of schools, such as the rise of marketing professionals in schools—many from outside education and with previous business experience, the business-like activities in this domain, or the use of external consultants on marketing research (McDonald et al., 2019; Pini et al., 2016) —which coexist with evidence of more subtle and non-commercial marketing practices implemented by schools (Forsberg, 2018). In this context, it is also important to determine whether private schools, typically achieving top results in national standardized tests, base their competitive strategies on educational attributes or as reported in previous quasi-market analyses, emphasize symbolic aspects unrelated to teaching and learning improvement (Creed et al., 2021). By studying how schools in Chile navigate the "purer" education market of private schools we seek to contribute to this body of literature. It is worth noting that the literature analyzing schools' competitive responses is dominated by experiences from England and, more recently, the United States (Greaves et al., 2023). Thus, analyzing a different institutional context contributes valuable international insights.

The Private School Market in Santiago, Chile

The Chilean educational system has a long-standing tradition of private participation as education providers. Since the market-oriented reform in 1980, three types of schools have existed. Private schools operate without the state's financial support and charge fees to families. Private subsidized schools are free or low-cost private schools that receive state subsidies and operate under several state regulations. Public schools are financed and managed by the state. The changes to the public system have been dramatic. In 1980, public schools captured 81% of the enrolment, while in 2024, only 37%. This rapid decrease favored private subsidized schools, which now educate 54% of the total child population. The Chilean quasi-market model has been the subject of multiple studies at the international and local levels, which have focused mainly on outcomes (Gallego & Hernando, 2008; Hsieh & Urquiola, 2003) and some on competition dynamics (Carrasco & Fromm, 2016; Zancajo, 2020). However, there is no evidence from the non-subsidized private sector regarding competitive dynamics, which is the focus of this work.

The non-subsidized private sector has remained relatively stable, with enrolments varying from 7% to 10% during the last 30 years. At the national level, official data from 2023 show that 593 private schools serve 337,416 students. The stability in the total enrollment, however, does not mean a lack of dynamics in the market functioning. Despite no official statistics on the matter, Grau et al. (2015) suggested that the non-subsidized sector accounted for 9% of the creation of schools and 14% of closures (1994-2012) and exhibited a higher exit rate (2.5%) compared to public and private subsidized schools. However, this data must be read cautiously, as new regulations have been introduced in recent years that might affect market dynamics, as well as the decline in the natality rate experienced by Chile over the last years. Moreover, 40% of the non-subsidized private schools operate in Santiago, with nearly 65% of these schools concentrated in seven of the city's 32 municipalities. As proximity between schools is considered a catalyst of competition (Misra et al., 2021), these figures suggest a well-defined market landscape of non-subsidized schools in Santiago. In Chile, the Ministry of Education must authorize these schools to operate, but they are not subject to all the regulations of the state-financed sector. In addition to the possibility of charging fees, schools can be for-profit organizations and select students (of any age) based on their own criteria, including academic potential, socioeconomic status and cultural background.

The sector has been described as a space of elite cloistering due to its high socioeconomic segregation (Gutiérrez & Carrasco, 2021). These schools charge monthly fees that reach up to 12 times the state subsidy per child, with additional charges related to incorporation quota and enrollment fees. However, not all private schools are targeted at socioeconomic elite groups, but also at socioeconomically emerging families, which can pay values not too different from those of a high-fee subsidized private school. Although the unsubsidized private sector is not limited to elite groups, it mainly organizes itself as a parallel space to the state-funded quasi-market, driven primarily by parental preferences. In practice, parents seeking a new non-subsidized private school do not often include publicly funded schools in their choice sets. Indeed, of the 59,577 students enrolled in the first levels of private elementary education in 2024, only 6% also applied to a state-funded school.

School choice in Chile operates in a context where different sources of information regarding academic performance are publicly available (Flórez Petour, 2015). All schools are mandated to publish their educational projects, stating their mission, pedagogical approaches, and academic features. The educational authority directly provides school-level information to compare the academic performance of the schools. On the one hand, all schools take part in SIMCE, the national-level standardized test to annually assess the quality of the education the schools provide in several grades and subjects. SIMCE data is the leading indicator used by the government to produce

a classification of schools (categories known to the public). Indeed, in the last round of assessment, 40% of the non-subsidized private schools were classified in the top level, while only 12% of the non-subsidized private schools and 6% of the public ones were in the top group. On the other hand, results from the university entrance exam are also public and used by the media as a proxy for the quality of education (Simbürger & Guzmán-Valenzuela, 2019). For example, in 2024, the media reported that 98 out of the top 100 schools were non-subsidized private.

Although the role of the non-subsidized sector has been incipiently studied in Chile, very little information exists about how these schools navigate the market and their competitive actions. To the best of our knowledge, no previous studies have researched this topic in Chile. In this context, this article aims to examine the extent to which schools' principals recognize competitive pressure, and the strategies they implement to attract and retain students. Through this analysis we pursue to gain understanding of market functioning in practice.

Method

To respond to this objective, a qualitative study was conducted, comprising semi-structured interviews with principals of 32 private schools in the metropolitan area of Santiago, Chile. The case selection followed a series of criteria. First, we selected schools in municipalities with a greater concentration of private schools, maximizing the possibility of observing competitive behaviors. Accordingly, schools that had a monopolistic position in their sector (often rural) were excluded. Second, an attempt was made to capture the heterogeneity of the private sector, including both secular and religious schools, schools belonging to foreign colonies, schools with different price bands, schools with different teaching methodologies, for-profit/non-profit and of varying ages. Table 1 summarizes the main attributes of the sample.

Table 1
Sample Attributes (N=32)

Attribute	Number of schools
Tuition Fees*	
High	9
Medium High	8
Medium Low	8
Low	7
Year of Foundation	
Before 1989	16
After 1990	16
Bilingual curriculum	
Yes	16
No	16
Foreign Schools	
Yes	5
No	27
Religious orientation	
Non-religious	17
Religious	15

Note: Average annual fee. Low: 2000 to 3500 USD. Medium low: 3500 to 5000 USD. Medium high: 5000 to 6500 USD. High: 6500 to 8500 USD. For reference, Chilean minimum annual wage is around 6700 USD.

The fieldwork was carried out during the second semester of 2023. For each school, a semi-structured interview was held with the school principal. The interview covered six main topics: 1) Characterization of the interviewee and their perception of the main responsibilities that corresponded to their role; 2) The school application process, including requirements, dates, their perceptions about application trends over time and the factors that may influence those trends; 3) Conceptions that applicant families may have about the school, reasons why families might choose the school over others and school reactions to the increase or decrease of applicants over time; 4) Competitor identification and market research strategies; 5) Applicant recruitment strategies and enrollment goals; and 6) Notions and senses about what it means for schools to compete (see Appendix 1).

Most interviews were conducted online. Audio records were transcribed using artificial intelligence and subsequently checked by the research team. The qualitative data produced in the interviews was analyzed through a thematic analysis (Braun & Clarke, 2006). Following the procedures outlined by Braun & Clarke (2006), the interviews were transcribed verbatim and subjected to repeated readings. The data were then coded using a hybrid system that integrated both deductive and inductive codes (Miles et al., 2020). In a series of collaborative meetings, the research team systematically reviewed and discussed the data, iteratively developing a codebook until consensus was reached on the final set of codes (see Appendix 2). Initially, each analyst coded a subset of interviews. Subsequent team meetings were held to compare individual coding decisions, ensuring inter-coder agreement and refining the codebook as necessary (Saldaña, 2013).

The coded data was organized into a matrix (Miles et al., 2020), with categories and codes arranged in rows and individual schools represented in columns. We specifically coded data about the characteristics of schools, including their perceptions of competition and its intensity, and the competitive strategies they employed. Throughout the analysis, we examined the key features of each competitive strategy, paying attention to differences between schools and instances where specific tactics emerged. A cross-case analysis was then conducted to identify patterns of competitive strategies across different school types, based on their perceptions of competition and its intensity. This analysis led to the development of a typology of schools, categorized by their distinct positions, perceptions, strategies, and responses within the competitive market. The validity of our findings was ensured through regular peer debriefing sessions held throughout the research process.

Findings

In general, principals recognize that attracting and retaining pupils is a key priority for schools. In most cases, they acknowledge that attracting pupils has become more difficult in recent years, particularly in the early years of education, and identify two macro-contextual conditions as particularly relevant. Firstly, for most interviewees, the effects of the COVID-19 health crisis have transformed parents' approaches to schooling, leading families to postpone the age at which their children start school. While some attribute this change to a desire for greater protection for their children, others cite a practical situation, namely that nurseries and kindergartens offer full-day programs at a price equivalent to that of many schools which only provide half-day schedules at the early levels. Secondly, demographic changes are frequently noted, with the perception that there are fewer school-age children. While these contextual factors shape the experience of most schools, the perception of competition and its intensity varies considerably between them, depending on their position in the educational market. The analysis has led to the categorization of four types of schools, which are summarized below:

Traditional Elite Schools: These schools have more applicants than available spots. They are well-established in the market and do not see the need for advertising or performing special

actions to attract students. Applicants come to them due to longstanding prestige. These schools are well-known among the elite, and their name is associated with a specific educational seal (religious or associated with a foreign colony). While some experienced declines in applications at certain entry levels due to the pandemic, they are returning to their regular figures and have not taken specific actions based on that decline. As oversubscribed, these schools do not engage in active instances of competition but find ways of taking advantage of their predominant position to navigate the marketplace.

Traditional non-elite schools: These are located in areas where school-age children have decreased or in neighborhoods that have lost appeal (such as the city center). Historically, these mainly Catholic schools had many applicants, but now struggle to fill their spots.

Niche Schools: These schools present themselves in the market as a non-traditional educational project. Within this group, there are two types of schools. The first subgroup focuses on a niche pedagogical approach with few students per classroom, which is part of their attractiveness to families, positioning themselves as educational offerings aimed at a limited segment of the parents. These schools serve more affluent families and are often oversubscribed. A second subgroup uses an 'inclusive' seal to separate themselves from regular schools without declaring a particular pedagogical view. These schools are presented as an alternative for those students with negative past experiences in traditional settings and are usually undersubscribed.

Emerging Schools: These schools must make themselves known to attract more applicants. They mostly emerge in response to city expansion and cater to families in gentrified neighborhoods. Often, their focus is local, attracting students who live near the school. These schools, which take up the majority of our interviews, implement a wide range of competitive responses. While some have been successful in positioning themselves in the market, others still struggle to build a reputation. Some of these schools belong to new religious movements, and others are part of national or international schools' networks.

As part of the interviews, the principals were asked to report on the other schools their applicants were considering and identify which schools they considered their main competitors. Not only did principals consistently report other non-subsidized schools as competitors, but they also mentioned schools of the same type (e.g., the principal of a niche school would mention only other niche schools). Only one emerging school reported potential competition with a non-subsidized private school. This confirms that these schools operate in a parallel market to those publicly funded, as well as within very well-defined circuits of schooling within the non-subsidized private sector.

In this landscape, we identified five distinct strategies to navigate the marketplaces that are enacted in different ways among schools: Location, Market Scanning, Marketing, Differentiation, and Pricing. These strategies are not mutually exclusive and represent a range of tactics varying in scope and sophistication, and they also vary significantly according to the position of the schools in the market. The schools enact these strategies in a variety of ways, resulting in a heterogeneous landscape of actions and responses. In what follows, we describe these responses, emphasizing differences between types of schools when applicable. A summary of the responses or actions of the different types of schools can be found in Table 2.

Strategy 1: Location Decisions

The first competitive strategy corresponds to decisions concerning the geographical location of schools. This strategy appears in emerging schools when undertaking an educational venture or in Traditional Elite schools opening new headquarters in a gentrified area. Previous studies have suggested that new schools choose their location based on the number of school-aged children and

sociodemographic information about the families in the area (Gulosino & Lubienski, 2011). According to some principals, certain school owners tend to look carefully at the city's urban growth to identify business opportunities or find specific new niches to locate the schools when determining where to settle, change, or open a new venue:

> I think it was a strategic decision [to locate the school here]: a place where there were families that we were interested in serving. When we arrived here in 1985, this neighborhood was developing, just beginning, and we saw the opportunity to set up here. (Emerging School #15)

The link between urban development and locational positionings is more explicit in some cases, in which decisions to open schools in some areas were based on the systematic review of precise data regarding urban regulations, or on the invitation of real estate agencies who saw new market opportunities for schools in recently settled neighborhoods:

> This is the first school in [this area]. This school is 28 years old, and today there are many schools here, but this was the first one. It was like a bet to say, 'Well, this is a place under development, and we are going there.' And there was an invitation, I understand, from a real estate company or something like that, like saying, 'Hey, (...) we are interested in having a school in this land. (Emerging School #14)

This attention to urban development is intertwined with an evident orientation to potential families with specific socioeconomic profiles expected to be targeted by the schools.

> In the second case [of a school opening], it is a school that you say: we are going to build a school in the middle of a neighborhood for people who have a new house, a new car and want a private paid school". (…) Let us see: the regulatory plans of the municipalities are for public access. You can go to a municipality and review the regulatory plan. Then you say: "hey, you know what? Here, I see that this area was established for housing of such a size and at a certain price, so it would be a good model to install. (Emerging School #1)

Location decisions are often used to secure a market share in a developing area. However, no indication of location decisions based on the educational performance of the existing schools in the area was disclosed.

Strategy 2: Market Scanning and Research

The second strategy deployed by private schools in the face of competitive pressures corresponds to market research activities aimed at gaining information about the local market environment (Woods et al., 1998). This tactic is most notable in schools with a low or a downward enrolment tendency and those wanting to expand their market share. While the interviews reveal a variety of market scanning activities, there is an emphasis on formal actions, conducted both internally and externally, which demonstrate the dissemination of business-like activities in this sector and a certain professionalization of this domain—aligned with former initial findings on the private/elite sector overseas (McDonald et al., 2019; Pini et al., 2016).

Some principals reveal the enactment of systematic activities for studying the school competitors that are primarily conducted internally, both by themselves or by other school personnel, generating new roles for administrative staff. These activities are generally based on reviewing websites or secondary information from schools, and only in exceptional cases other

"cover" actions, such as visiting competitors "acting as mums" (Traditional Elite school #5). In other cases, this information is collected as part of the admission process through surveys of applicants who are asked to report on the other schools they are simultaneously applying to. The data collected ranges from specific topics to more comprehensive reviews:

> We are collecting a comprehensive amount of data [about other schools]. We are interested in their monthly fees, educational projects, what stands out in each educational project, the tuition costs, and the hourly pay for teachers. [We are doing this] to see if we are being sufficiently competitive or not with other schools in the sector (…). This is why we are going to take advantage of the opportunity to do an extensive study. (...) We are doing it ourselves through our school quality coordinator (...) and it will help us to make decisions. (Non-Elite Traditional School #3)

While in most cases, market research is internally conducted, certain principals also report the contracting of external services in this area—highlighting a trend towards professionalizing this practice. Indeed, some schools have outsourced market research studies to evaluate their position in the market or to answer specific questions, such as the factors behind their downward trend in enrolment, which usually combine primary and secondary data and may be producer or consumer oriented. Within these cases, a notable example corresponds to the myriad practices developed by an external firm contracted by the global education network owning one of the emerging schools interested in increasing its market share, which combines multiple activities ranging from multidimensional school review sheets of competitors to mystery shoppers' actions.

> Now, we are just developing an external study. In fact, next week, we will get the final report. We are doing a market positioning study of the school (...) because of this low admission to understand why this happened to us. (...). The study includes different things: they did a survey of the school's parents, and interviews with different people in the community as they stood in different places. [They asked] "what do you expect from a school? What do you think of such schools?" without giving the name of our school. (Emerging School #14)

Interestingly, most schools that use market research activities do not focus primarily on academic achievement data or pedagogical issues when investigating their competitors or the potential clients' expectations. Instead, they tend to concentrate on diverse aspects related to the schools' offer—such as their schedules, costs, or distinctive aspects—which are not expected to improve their academic quality but instead to feed their differentiation or imitation strategies to enhance their attractiveness to parents. This strategy was most commonly found in Emerging and Traditional Non-Elite schools, which perceive greater competitive pressure in the market

Exceptionally, some Traditional Elite schools (the type facing less competitive pressure) mentioned taking part in comparative surveys of teacher income to establish a benchmark and retaining specialized teachers, besides informal practices for gathering information about the market relying on personal networks or a so-called "friendly schools network."

Strategy 3: Differentiation Decisions and Processes

A critical element in explaining the strategies deployed by the schools is the identity they convey. The differentiation strategy can take dissimilar forms across the school types. In some cases, it obeys a business decision when starting a venture. In contrast, in other cases, it operates as a subtle process that reinforces attributes well-known by specific communities.

Typically, principals can easily identify the image they want to project and the attributes mediating the prospective families' decision to apply. However, this definition is relational, as it occurs in interdependence with what other actors offer families in the school market. Therefore, especially in schools that have entered the market recently, the definition of the school seal is framed not only with an initial educational purpose but also with the characteristics of the available offer in the local area. The same happens with schools that are not placed at the top of the market hierarchy, where the characteristics of the existing offer shape the identity of the schools:

> All the schools around us that compete, private schools with high academic standards, are all, absolutely all, religious. We, on the other hand, are a secular alternative. We are a completely secular school and emphasize our secular nature. We do not provide religious education, but we offer philosophy for children from preschool to 12th grade. (Emerging School #9)

In the case of some emerging schools, just "being non-subsidized private" constitutes an attractive factor for middle-class families attempting to access a type of education perceived to be better (or more prestigious) than state-funded schools. The differentiation process, however, also takes a more subtle form among schools that share common general attributes. For example, in schools with the longest tradition, prestige, and history, there are seals associated with different religious denominations, and parents easily identify these attributes. In these cases, differentiation is given by reasons of tradition and homophily. However, it is not necessarily something actively cultivated in communicational or marketing terms: "Just like in political coalitions, the Church is one, but the same within the Church, is full of denominations" (Traditional Elite school #8). Thus, confessional schools are perceived as a particular offer within the private sector and present de facto differentiation among themselves. This differentiation, which is not an immediate response to the market pressure but a long-standing process of building prestige, seems to be known by families, and transmitted and perpetuated through common social circles and oral recommendations:

> The vast majority of the families that come without being alumni (…), come because they know an alumnus. Or because they work with an alumnus. Then they tell you 'I love the way he is, I want my son to be like him, and I know that everything he is, he learned at [this] school. (Traditional Elite school #7)

In some instances, these schools' specialization levels are so pronounced that the principals perceive themselves as the last line in offering a particular type of religious education, with no further alternatives available at the national level:

> I have a "pseudo captive" niche. I don't know, I think it's the more religious families. But "pseudo captive" because they decide to leave Chile when they are unhappy with my product. (Emerging School #11)

Schools that use non-traditional pedagogies in the Chilean context (for example, Waldorf Montessori) are comparatively newer than Catholic schools, therefore, they have been challenged to make themselves known and establish a clear identity in the school market. Since such approaches are not yet very popular in the country, these schools face the tension of attracting enough families motivated by this type of education and not just functioning as second-chance schools that receive students who have had bad experiences in schools with traditional settings and seek more flexible spaces for their education. In this way, these schools' identity construction process corresponds to a work done with the parents themselves rather than generating external communicational actions:

> I would say that it's like 60-40. I would say that 40% of the families know the method and have chosen this (…) there is a lot of work to do with the families (...) training for families to understand what school space they are in and how this school space differs from what they experienced [in previous schools]. To the parents who apply, that is the work that needs to be done. (Niche School #2)

In our inquiry, then, the main attributes of differentiation rested on religious identities, belonging to binational communities, a particular pedagogical approach, or the promise of an inclusive and protective space for children, referring to aspects of a permanent nature in the educational project. Of course, this does not mean that schools do not foster actions of academic improvement, but those instances appear to be detached from the competitive dynamics. As mentioned, very rarely do principals report actions of educational improvement or innovation that allowed them to attract new families or retain current ones:

> We will be the first school in South America with a Finnish international curriculum, which is the best education in the world, and we will also have the international baccalaureate. These are two innovations that obey more than anything our search always to do the best, and that obviously should have an impact on more students or maintain a constant number of students. (Emerging School #8)

The dissociation between competition and educational improvement is related to different causes in each type of school. For example, top-hierarchical schools seem to share an image of high quality that is recognizable in their long tradition as leaders in the sector. In such cases, academic quality is seen as an inherent attribute of the school. In the case of emerging schools, there seem to be two situations. On the one hand, some of them emphasize that they have educational projects of excellence and that they attract parents who seek an education with good academic results. On the other hand, a segment of these schools does not include this aspect in their value propositions. However, in both cases, the image promoted by the schools' centers around other attributes favored by the families, such as security, a small school, or a school close to home. The lack of promotion of academic initiatives appears as both a response to families' desires and a realistic evaluation of their hierarchy in the educational market. This is evident in the accounts of actors who perceive difficulties competing with higher-ranking actors in substantive educational aspects. Thus, to navigate the market, some of these schools deploy strategies of hyper-segmentation of the target audience:

> And it's fine because obviously, I have to try to attract more students than the other school I have to try to be better than the other school. And if I can't match it in, for example, PAES results [University entrance exam] I will have to look for something else I can surpass it in and that is more attractive to the parents. Like, for example, this issue of Catholic patriotism. (Emerging School #12)

Strategy 4: Marketing

School marketing corresponds to the school's dissemination through advertising and direct communication with families. This is how schools represent themselves internally and externally, which is increasingly considered important and professionalized (Pini et al., 2016).

The principals report a clear transition in communications with families and applicants. Gradually, they have moved from traditional marketing devices (leaflets, brochures, posters) to digital platforms or social media (Instagram, websites, Facebook). Contrary to what might be

expected, actions such as advertising in newspapers or using billboards were infrequent. The schools' ways of publicizing continue to focus on the school's communities and building family loyalty to reach family types similar to those already participating. It relies on word of mouth, so what the school does is constantly disseminated to families.

Some principals also mentioned new and striking marketing actions, such as purchasing databases with contact information and social networks of families with school-age children who live in specific neighborhoods. This sophisticated strategy is accompanied by a communications agency, which also evaluates the strategy's effectiveness by measuring the number of interactions with the advertising sent and the effective enrolment in the school.

> In other words, we have our advertising and marketing agency. Our proposal is to make the school known to the community in this area. We buy databases of families that we are interested in influencing through the platforms, the networks, and we make our advertising (…). So today they offer you [data], depending on the student profile that we want to attract to the school and at the levels that we need. So, if I want to bring Playgroup, who is three years old, I won't be putting my advertisement on the networks in an age group of 60 years old, 70 years old. So, they establish the logic in terms of saying well, for them to have children who are three years old, four years old, five years old, they have to be more or less like 30, 35 years old. (Traditional Non-Elite School #2)

However, communication with families does not emphasize aspects directly related to teaching and learning, but works as a strategy to maintain a community climate. In the end, families are considered to be the best promoters of the school.

> They come to the school mainly because they were recommended or someone told them about the school. Very few arrive… some come through the website, eh, but I would say that the vast majority is because they have someone they know at school or someone told them about the school. And that word of mouth is what has filled us mainly with applicants. (Niche School #5)

Occasionally, principals report other direct actions to promote the school with nearby families, using attractive open-day activities. For example, one emerging school sets a circus on school grounds on weekends as an activity to the neighborhood, attracting the community public and possible clients for the school so they can get to know the project. In accordance with previous literature findings, schools' marketing strategies revolve around soft information more than hard information (e.g., academic results in standardized tests).

Strategy 5: Actions Associated with Pricing

School principals interviewed often mentioned price as a relevant factor for attracting and retaining students. Many use the concept of "staying above the waterline" to refer to the balance between the number of enrolled students and the price charged, which allows the school to cover its costs. Naturally, this equilibrium guides much of their management. In some schools, the costs are not only associated with monthly fees but also include annual tuition and incorporation fees.

However, for students who are already enrolled, the definition of prices is quite flexible. Most offer scholarships and temporary discounts for families facing economic crises. They are willing to sacrifice part of their current income instead of risking students leaving the institution, especially at more advanced levels, where it is less likely to find a student to fill that spot. This flexibility became more extensive during the pandemic when many families saw their incomes

affected and requested to renegotiate the payment terms. In other cases, the scholarship system is an initiative of the parent centers, entities that charge a fee to the parents and, among other purposes, use it to finance support for families that require it, with no formal involvement from the schools.

The flexibility in prices exists not only as a strategy to strengthen consumer loyalty but also as a way to attract new students. Some schools have announced fee reductions for the first levels to compete with the nurseries' offer. Such discounts range between 15% and 50% on the annual fee. In other cases, discounts are applied through collaboration agreements between institutions. For example, one traditional non-elite school reported offering a 50% discount to families who enroll their children in the initial levels and come from specific nurseries with which they have established a collaborative alliance. In exchange for promoting the school, the nurseries can use its facilities for activities with their children and parents. These arrangements have gained popularity across schools as a response to the decline of enrollments in the first years of schooling after the COVID-19 crisis. In other cases, the students and parents of the school are transformed into sales agents, being incentivized to capture applicants by gaining a discount on the tuition fee:

> But my best sellers are my students and their parents. They live in the real world. The message we convey is that they are part of it. So, we have some financial benefits for those parents or students who recommend applicants. And if that applicant enrolls in the school, there is an economic benefit for that family [that recommends the school]. And it is a very significant economic benefit. Very significant. (Emerging School #4)

This approach establishes incentives to promote positive and convenient messages about the school's attributes. This molds the word-of-mouth recommendations that are essential for building the school's prestige and, therefore, attracting new applicants. This action moves further from the client-provider relationship, transmuting the parents into commercial agents for the school.

Actions associated with price are not limited to those schools pressured to increase the number of applicants but also those at the top of the market hierarchy. In those cases, navigating the market means taking advantage of the predominant position through collaboration with other oversubscribed schools. Surprisingly, some principals of Traditional Elite schools reported practices of price collusion with other schools:

> We have an association with 10 or 11 similar schools where we meet monthly. The school principals always try to coordinate. For example, every September, we discuss what we are thinking about the tuition rates for the next year (…) Some say they will increase by Consumer Price Index (CPI) plus 0.05, while others say only CPI. This allows us to stay within a range. (Traditional Elite School #8)

In this case, the interview did not explain this practice of collusion as a way of securing income for the school but as a way of controlling excessive price increases in the sector. This approach, de facto, does not trust competitive strategies as the most efficient way of reaching school prices market equilibrium. This type of collaboration between actors is only possible for those schools with more applicants than available vacancies. In other cases, such as a group of schools that sought to take advantage of economies of scale to jointly negotiate the price of school insurance that parents must purchase, the collaborative initiative failed. In practice, the initiative clashed with the competitive dynamics as the schools started to realize that they were targeting the same families and "started to hide information from each other, and well, in the end, it vanished" (Emerging School #5).

Table 2
Summary of School's Actions/Responses in the Marketplace

School Type	School's Market	Dimensions	Actions/responses
Traditional elite schools (*n*=8)	Oversubscribed	Differentiation	Emphasis on the particular religious denomination of the school
		Pricing	Price collusion
		Market Scanning	Hiring a comparative study of teacher income
Traditional non-elite schools (*n*=3)	Undersubscribed (declining)	Market Scanning	Hiring studies about competitors' characteristics
		Marketing	Hiring advertising and marketing agencies, customed advertising in social media, buying databases with information on potential costumers
		Pricing	Alliances with nurseries, fee discounts
Niche schools (*n*=6)	Oversubscribed	Market Scanning	Using school networks to gather information regarding other schools
		Differentiation	Emphasis on the educational approach
	Undersubscribed	Differentiation	Emphasis on inclusion for students with special educational needs
		Marketing	Leaflets, contact parents of schools that are about to close, "open day" activities
Emerging schools (*n*=15)	Oversubscribed	Location	Examining land use regulatory plans, alliances with real estate companies
		Market Scanning	Using school networks to gather information regarding other schools, market scanning through surveys to the school's applicants, reviewing websites, cover actions (mystery shopper "acting as mums')
	Undersubscribed	Differentiation	Emphasis on the religious/secular aspect of the school, emphasis on non-traditional teaching methods, emphasis on private education for middle-class families, hyper-specialization of educational projects
		Marketing	Websites, social networks, leaflets, brochures
		Pricing	Discounts for parents recommending the school

Discussion

Given the extensive research of school competition in quasi-market settings and the limited study "purer" market scenarios, this article focuses on the non-subsidized private sector in Chile, exploring principals' perceptions of competition and the strategies they employ to navigate the market. By addressing this objective, we aim to scrutinize the extent to which market theory

assumptions are fulfilled in a setting with fewer state regulations, greater availability of resources and increased school autonomy. The study's key findings reveal that market pressure influences school practices in a manner that both aligns with and diverge from market assumptions. In what follows, we discuss our main findings in light of the assumptions of market theory, emphasizing both the similarities and particularities of purer markets in comparison to quasi-market settings research.

Firstly, the study highlights that schools' perceptions of competition vary depending on their position in the school market (Jabbar, 2015; Linick & Lubienski, 2013). Competitive pressures experienced by schools serve as a clear catalyst for schools' responses, prompting them to take action. However, the schools' ways of navigating the market are heterogeneous and multiple, ranging from classic competitive strategies such as Marketing and Differentiation to non-competitive actions such as schools-nurseries partnerships and price collusion. Despite the apparent similarity between these responses and those in quasi-market environments (e.g., Zancajo, 2020), our research suggests a higher degree of professionalization and sophistication within schools' strategies in the private sector (McDonald et al., 2019; Pini et al., 2016). In this respect, we have pointed out the growing presence of school actors specialized in areas related to market scanning or communicational aspects within the school organization, as well as the practice of outsourcing these functions to private agencies in marketing and market research. Moreover, these actions often involve importing practices from businesses or other markets, such as purchasing databases of specific audiences, targeted advertising according to socio-demographic profiles, or using mystery shopper mechanisms. Therefore, greater autonomy and availability of resources and less state regulation do not appear to alter the logic of schools' responses to market pressure. Instead, these conditions appear to increase the scope for their further specialization and sophistication and the opening of new markets.

Secondly, although in a general perspective the responses identified tend to resemble those in quasi-markets, we underscore that the fact that private schools are not subjected to price regulation and can set their fees becomes a key instrument for responding to competition. The use of this tool operates in different ways. On the one hand, it allows schools to adjust their fees as a strategic response to the threat of losing enrolments. On the other hand, it facilitates collusive actions to maintain market share, even among prestigious elite schools that may not face significant enrolment issues. Importantly, the use of pricing as a competitive strategy does not necessarily correlate with improvement or innovations but rather serves as readily available tool to address competitive pressures, thereby leaving market expectations of improving teaching quality unfulfilled.

Thirdly, our findings indicate a discrepancy between the responses to market pressure and market assumptions about parental choice, in that schools seek to attract families and disseminate 'hard' information that enables them to search for a high-quality school. On the one hand, we find that some schools' actions - more than actively seeking prospective students - are very clearly directed to current families in schools, seeking loyalty and encouraging word of mouth to attract newcomers (Jabbar, 2016), even turning parents into schools' best sellers with practices such as price discounts. On the other hand, there is evidence that the positioning of schools does not focus on disseminating information about their academic quality that would allow families to make better choices but rather on soft or superficial information (Lubienski, 2006), which challenges traditional market theory assumptions. Two elements should be considered in this regard. A first possible explanation for the lack of centrality of academic performance in the schools' responses to market pressure is the widely disseminated information about schools existing in Chile. Indeed, non-subsidized private schools enjoy prestige consolidated over decades of reporting high standardized test results and families tend to take this domain for granted (Bellei et al., 2020). In this sense, disseminating hard information may not be as relevant because it is already available in the system and does not show greater differences within each type of school (which are the actual circles of

competition). A second issue to be considered is that not all types of schools construct their market position by alluding to academic attributes. Principals' narratives highlight other aspects of schools to attract families, such as identification with specific values or a welcoming and inclusive school culture. In such cases, disseminating hard information on academic elements would be of secondary relevance.

Fourth, market pressure primarily triggers competitive reactions. Although studies in quasi-market contexts have also suggested collaborative or inaction reactions, competition appears to be embedded in how schools navigate this 'purer market'. The cooperative relationships detected, in contrast, are focused on contexts of low market pressure, meaning those schools whose applicants are far more numerous than the available vacancies. The other cooperative initiatives mentioned by the directors referred to mutually beneficial alliances between institutions offering different products (for example, a nursery and a school). The only actors who showed a certain level of indifference to market pressure were those in a dominant position in the market hierarchy and whose position was not perceived to be threatened.

In conclusion, our study highlights that the promises of educational improvement inherent in market-driven policies appear to be disconnected from the practical reality of market functioning in education, even in its 'purest' versions. Instead of driving improvement and innovation, we observe that deregulation, heightened flexibility and increased resources seem to translate into more scope for sophistication, the further introduction of business practices, the marketisation of relationships with families, and the instrumentalization of price and its dissociation from quality. The similarities and differences between competition in pure markets and quasi-markets warrant further exploration to critically evaluate the assumptions of market theories as a means of enhancing the quality of educational systems worldwide.

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Appendix

Appendix 1. Interview Protocol

1. Characterization of the interviewee
   - How long have you been working as a principal at this school?
   - What is your educational and professional background?
   - What are your main responsibilities as principal?
   - Who is the owner of this school? (natural person, foundation, corporation)
   - What was the main motivation for opening this school?

2. School application process
   - What is the application process for this school?
   - How many applicants do you receive compared to the number of available spots? How has this changed over time?
   - How has the school reacted to an increase/decrease in the number of applicants?
   - In your view, is it currently more or less difficult to attract students than in the past? Why?

3. Conceptions that applicant families may have about the school
   - How do you believe families perceive this school when they apply?
   - What aspects distinguish this school? What would you say are its defining features, strengths, and weaknesses?
   - Why do you think families choose to apply to this school over others? What are they looking for?
   - Are the families who apply the type the school expects or hopes to attract? Is there a desired applicant profile that differs from the current one? If so, why?

4. Identification of competitors and market research strategies
   - Which schools would you consider your main competitors? What makes you identify them as such?
   - Where do you believe this school ranks in applicants' order of preference? How do the other schools you mentioned compare? Why?
   - What actions has the school taken to understand its competitors or to benchmark itself against similar institutions?
   - Has any research or data collection been carried out to analyze current or potential applicants, or to compare the school with other institutions?

5. Applicant recruitment strategies and enrollment goals
   - How important is student recruitment in your role as principal? Why?
   - Are there specific targets or goals related to attracting applicants?
   - To what extent do you think the school can influence the number of applicants it receives?
   - What internal or external factors affect the number of applicants?
   - What actions has the school taken to enhance its ability to attract students?
   - How important do you believe tuition fees are in families' decisions to apply?

- Does the school collaborate or coordinate with other schools or early childhood centers (e.g., nurseries) to facilitate applications or enrollment?
- Have any measures been taken to improve services for current students as a way to support retention?

6. Notions about competitions
   - Would you say that your school has to "compete" with others to attract students? What does "compete" mean to you in this context?
   - In your view, what are the positive and negative aspects of schools having to compete for enrollment?
   - If your school were to face more competition than it does currently, would that contribute to improving its quality?
   - What do you consider to be the school's main strengths and weaknesses when it comes to attracting applicants?
   - Is there anything else you would like to add regarding the topics we've discussed?

Appendix 2. Codebook Structure

Topic	Sub-topic	Codes
Characterization of the principal		Years in the position Background Priority/enrollment goals Admission team/area
Characterization of the school	General	Year of origin Municipality Type of owner Network membership Type of education project
	Economic sustainability	Stable economic situation Unstable economic situation
Demand	Relation between applicants and spots	Low applications Normal applications High applications
	Perception of demand	Decreasing demand Stable demand Increasing demand
Perceived competition	Factors affecting competition	Social outburst Pandemic Demographic changes Other reasons
	Identification of competitors	Identification of private competitors Characterization of private competitors Identification of public competitors Characterization of public competitors Non-identification of competitors

Topic	Sub-topic	Codes
Competition strategies	Marketing activities	Market research Market scanning Advertising Branding Targeting Others
	Enrollment coordination	Process adjustment Coordination with other schools Others
	Fees	Discounts Freeze Agreements Others
	Differentiation	Language Religion Sports Pedagogical innovation Others
	Location	Location
	Loyalty	Word of mouth Internal communication Others