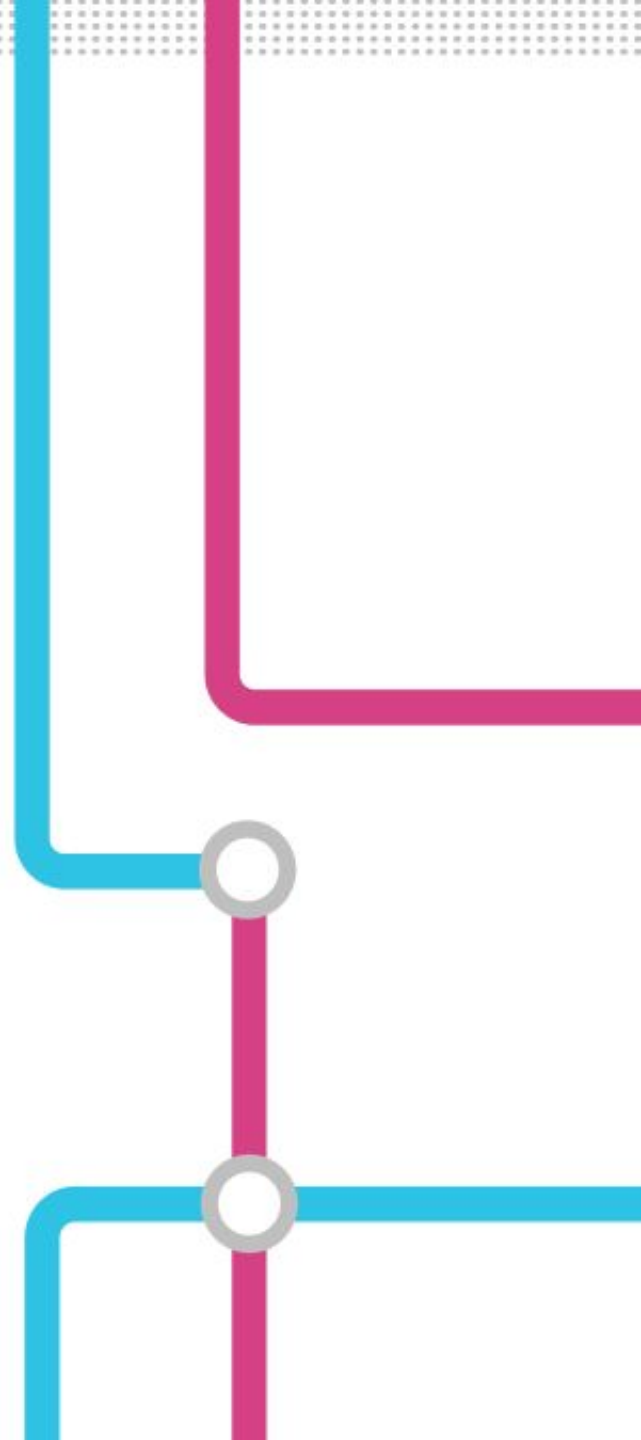


The
**Enrollment
Management**
Association

+

2020-2021 The Ride to Independent Schools



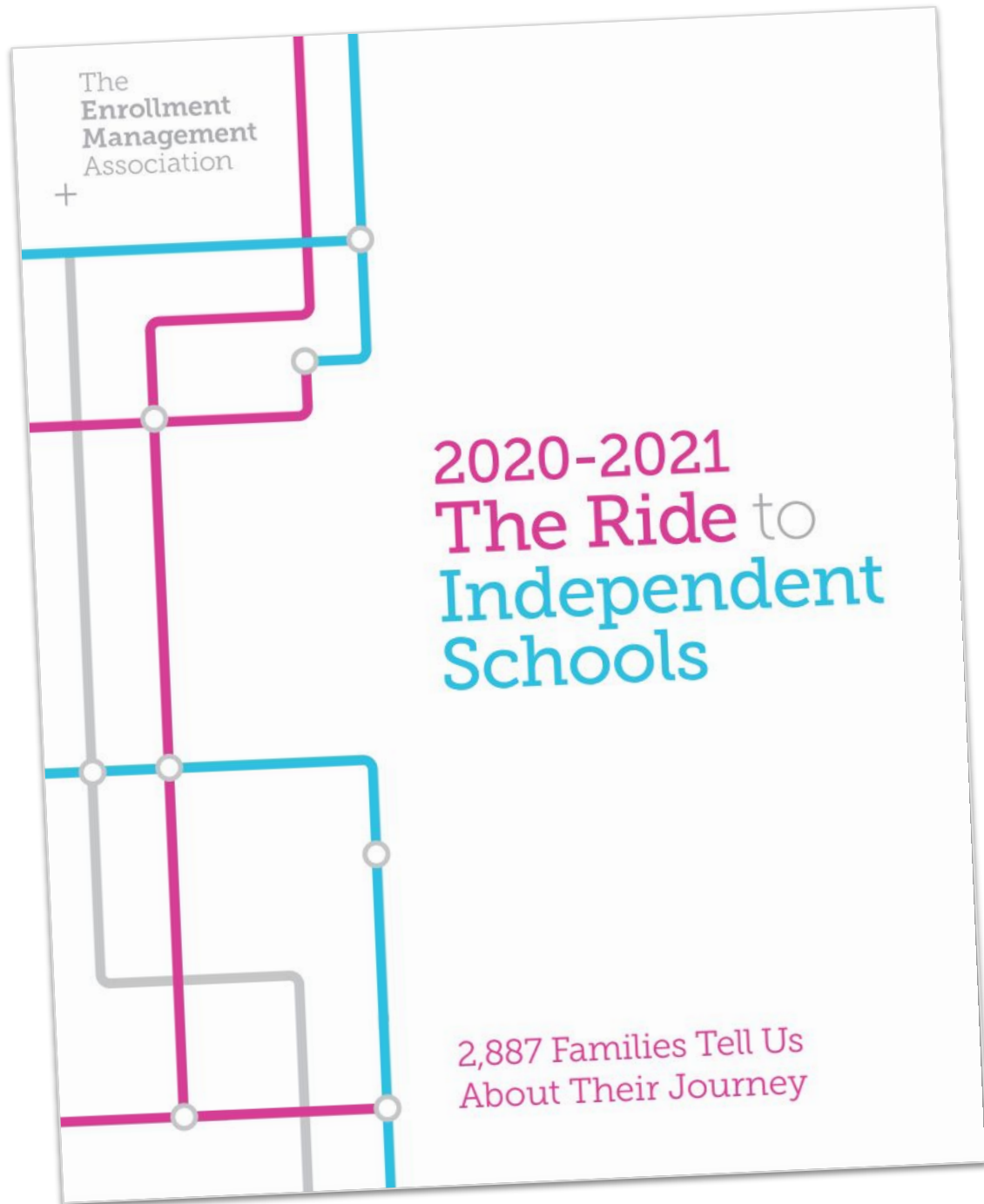
Speaker

Dave

Taibl

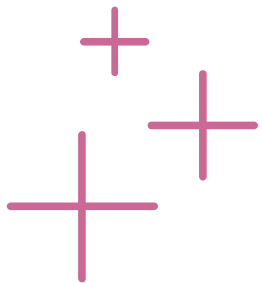
Director of
Business Development





Available **now** in EMA's
Member Community!

We surveyed **2,887 independent school families**
in the summer of 2020 about their journey to
enrollment at an independent school.
Here's what we learned.



Reasons Families Apply

Research Methods



Effective Recruiting Strategies



Application & Enrollment Process

COVID-19 Impact

International Families



Shift in Who's Purchasing



82%

Four-in-five parents (82%) are Gen X, while Gen Y and Boomers each account for less than 10%.

This age profile has shifted notably away from Boomers over the past three years.

GenX Purchasing

Parents in their 40's and 50's prefer **honest and clear** product and marketing messages that outline an **obvious path-to-purchase**. Gen X is more likely to conduct **online research at home** and then shop in person, while their younger counterparts conduct research on their phones, in the store. The best way to reach Gen X? Email. And while most are on social media, they are much **more influenced by email** marketing campaigns.

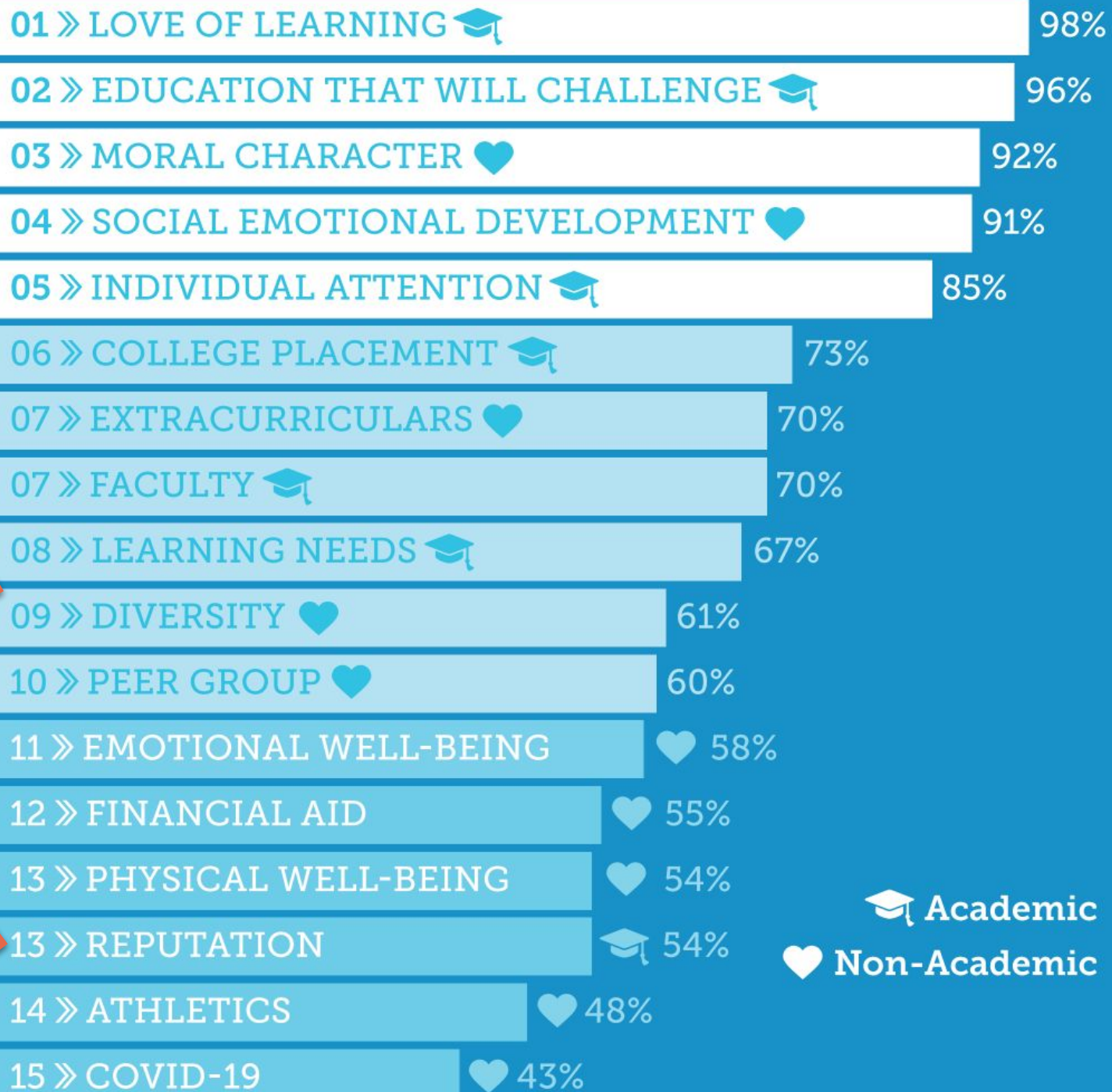
Millennial Purchasing

Traditional marketing has taken a backseat for parents in their 20's and 30's (less than 1% of Millennials are influenced by traditional ads), but word of mouth marketing, **user-generated content**, and social selling are much more persuasive. **Authenticity** is incredibly important to this generation and millennials are inherently suspicious of being sold or lied to by brands. Millennials want brands to **get real and rally behind a cause**, and they are willing to pay for it – in fact, they are 50% more likely to purchase from a company that supports a cause.



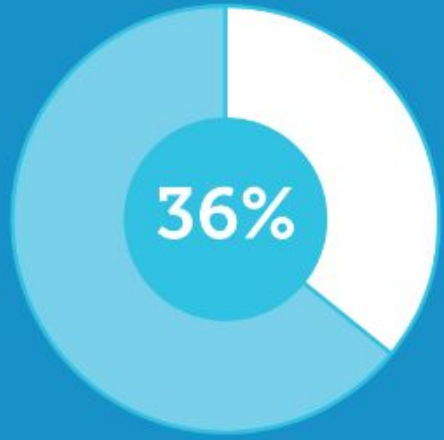
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Reasons Families Apply to Independent Schools



 Academic

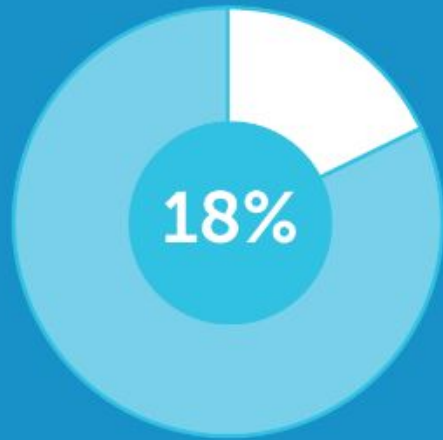
 Non-Academic



Wanted to explore other educational options



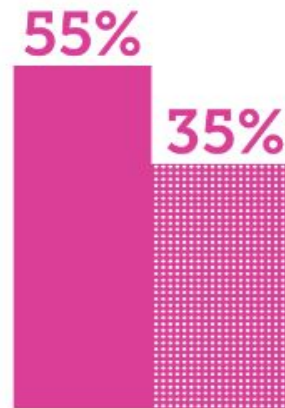
Needs to change schools because they are in their current school's final grade



Needs to change schools because unsatisfied with current educational environment

Parents are prepared to switch schools

Final grade of current school as consideration:



55% were in 8th grade during the application process.

Yet only 35% of parents indicated they are considering an independent school because their child was in the final grade at their current school.



Key Takeaways

Legacy and reputation are becoming less important in making the decision to apply to independent schools while diversity is becoming more important. Be aware of perspective when speaking about diversity.



Research Methods

MOST IMPORTANT SCHOOL INFORMATION SOURCES

School websites, other parents, school fairs, emails and counselors/consultants are the most important sources of information. The following were rated "Extremely important" or "Very important".



72%

Individual school website(s)



56%

School fair(s); Hosted campus visit



54%

Parents you know who have children attending/
have attended the school



54%

Email from school

Research Methods



Primary Method of Research:	TOTAL	U.S. Parents	Canadian Parents	International Parents
Parents you know who have children attending/ have attended	30%	29%	38%	22%
Individual school website(s)	26%	26%	30%	20%
School counselor/educational consultants/ access organizational advisor	13%	13%	9%	22%
Research on sites like privateschoolreview.com or boardingschoolreview.com	12%	11%	12%	26%
School fair(s)	7%	7%	1%	4%
Social media profile of school(s)	1%	1%	1%	2%
Searching on discussion boards from current parent and students	1%	1%	1%	2%
Other	11%	12%	7%	3%

SCHOOL FAIR STATS

6 *in* **10**

Almost six-in-ten parents (58%) attended at least one school fair in 2020

This is much higher than the comparable result in 2017 (41%).

2.3

Average number of school fairs attended in 2020

A majority of U.S. and Canadian parents who attended a school fair went to more than one, while international parents were more likely to attend a single school fair.

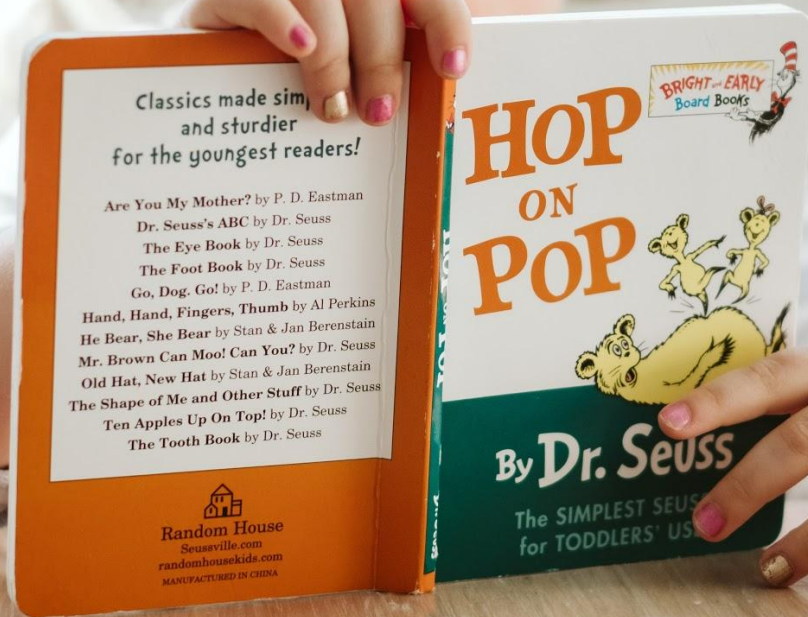


Key Takeaways

US, Canadian, and international families need customized outreach. Your website is the most important tool for families deciding to apply to your school. Make it clear and easy for families to understand your process!

3

Effective Recruiting Strategies





83%

Personal outreach by an admissions officer (phone or email)



76%

Attending school events



68%

The school's website



67%

Personal outreach by a teacher/coach (phone or email)

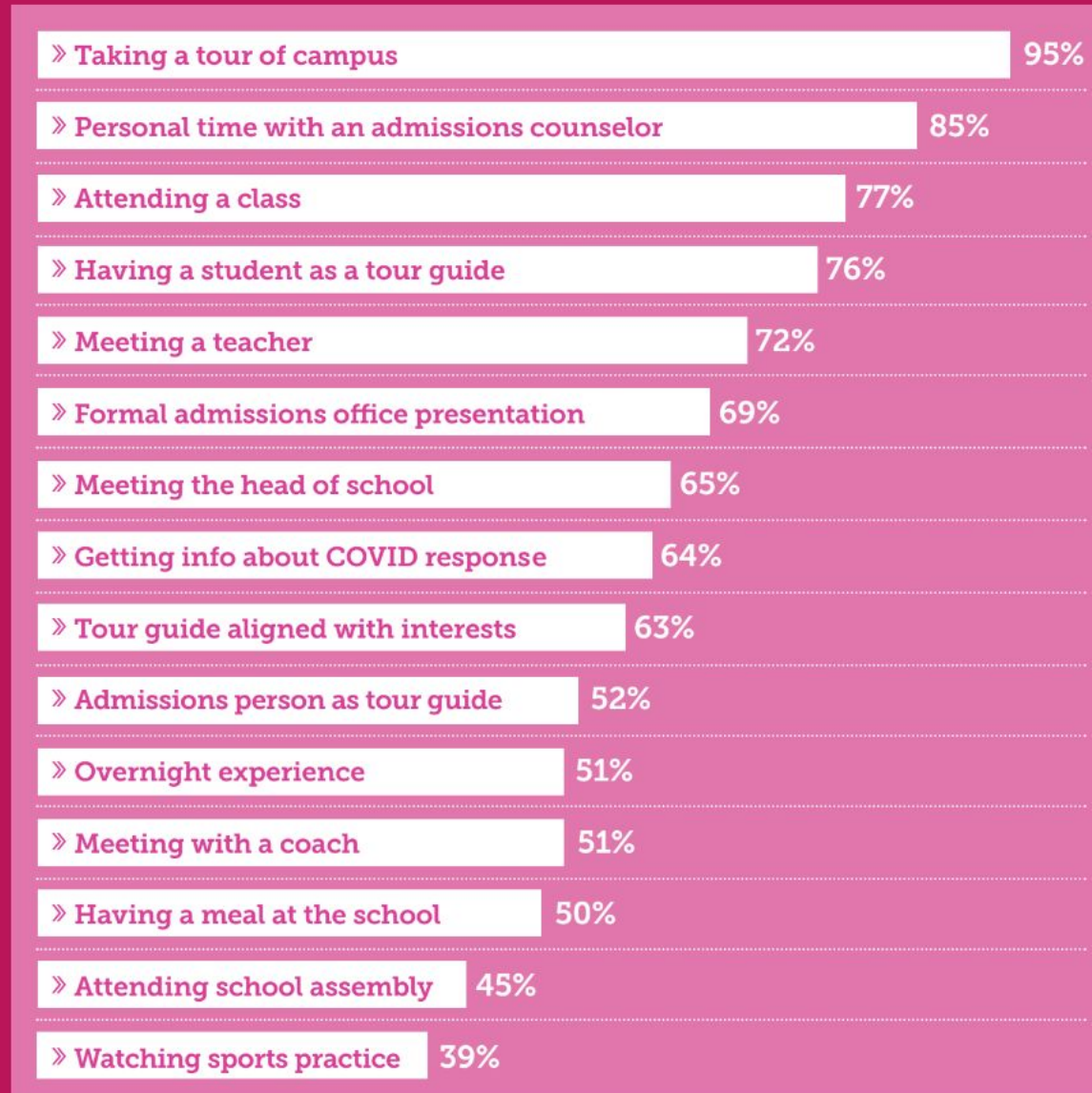


63%

Emails from the school

Families crave a personal outreach.

Making the Decision to Apply





Key Takeaways

A personalized approach will be critical for families. Creating compelling virtual opportunities for classroom visits, tours, and other experiences will be important.



4

Application & Enrollment Process

NUMBER OF SCHOOLS RESEARCHED & APPLIED TO

On average and similar to 2017, parents research or engage with approximately four schools before deciding where to apply. International parents tend to research more schools on average (4.9) whereas Canadian parents engage with slightly fewer schools (3.1). This year, U.S. parents applied to an average of three private/independent schools and Canadian parents applied to an average of two, while international parents averaged five applications. Since 2017, the average number of schools parents apply to has risen slightly, driven by U.S. and international parents.

3.9

Average number
of schools
researched

Nearly 1 in 5 parents
(19%) researched seven
or more schools
(up from 16% in 2017)



3.2

Average number
of schools
applied to

More than 1 in 5 parents
(22%) are applying to five
or more schools
(up from 19% in 2017)

USE OF A COMMON APPLICATION SERVICE

Over half of parents (56%) used a common application service when applying to private/independent schools this year, representing an increase of 9 percentage points over the 2017 finding. Parents in Canada, however, are much less likely to have made use of this type of service (just 25%).

56%

of parents used a
common application
when applying

REASONS FOR NOT USING A COMMON APPLICATION



45%

The school(s) your child applied to didn't accept this type of application



30%

You did not know this was an option



26%

You only applied to one school

47%

Overall, 47% of parents say that applying to schools is more work than they expected. To make matters worse, one in seven parents (14%) dropped a school from consideration because the application process was too much work!

HOW ENROLLMENT DECISIONS ARE MADE

Academics dominates the list of decision factors (86%), followed by clubs and activities (56%), sports (43%), diversity (42%), college counseling (40%) and financial aid (39%). Other factors mentioned include the school's culture, environment, learning support and specific programs.



86%

Academics



56%

Clubs and activities



43%

Sports



42%

Diversity



40%

College counseling



39%

Financial aid

DECISION FACTOR	RANK: CHOOSING TO APPLY*	RANK: CHOOSING TO ENROLL*
Academics	1	1
Clubs & Activities	15	2
Sports	5	3
Diversity	7	4
College Counseling	14	5
Financial Aid	16	6

**Out of 16 choices*



**One-in-ten parents (10%)
decided against a school as a
result of a revisit day.**

These parents give a wide range of reasons, including their own or their child's preference or dislike for a particular school, whether or not they received financial aid from the school, how well the school handled either in-person or virtual revisit days and concerns relating to COVID-19.

83%

Of parents said that their

**KIDS WERE TO
A "GREAT" OR "VERY
GREAT" EXTENT
DECISION MAKERS**

in terms of applying
to schools

Why don't families apply to a school they visit?

“Daughter did not like the culture of the schools.”

“We were not pleased with the dress code particularly for the female students, this is 2020, not 1960.”

“Did not offer a particular sport.”

“My child ranked the schools and applied to the schools he was interested in attending.”

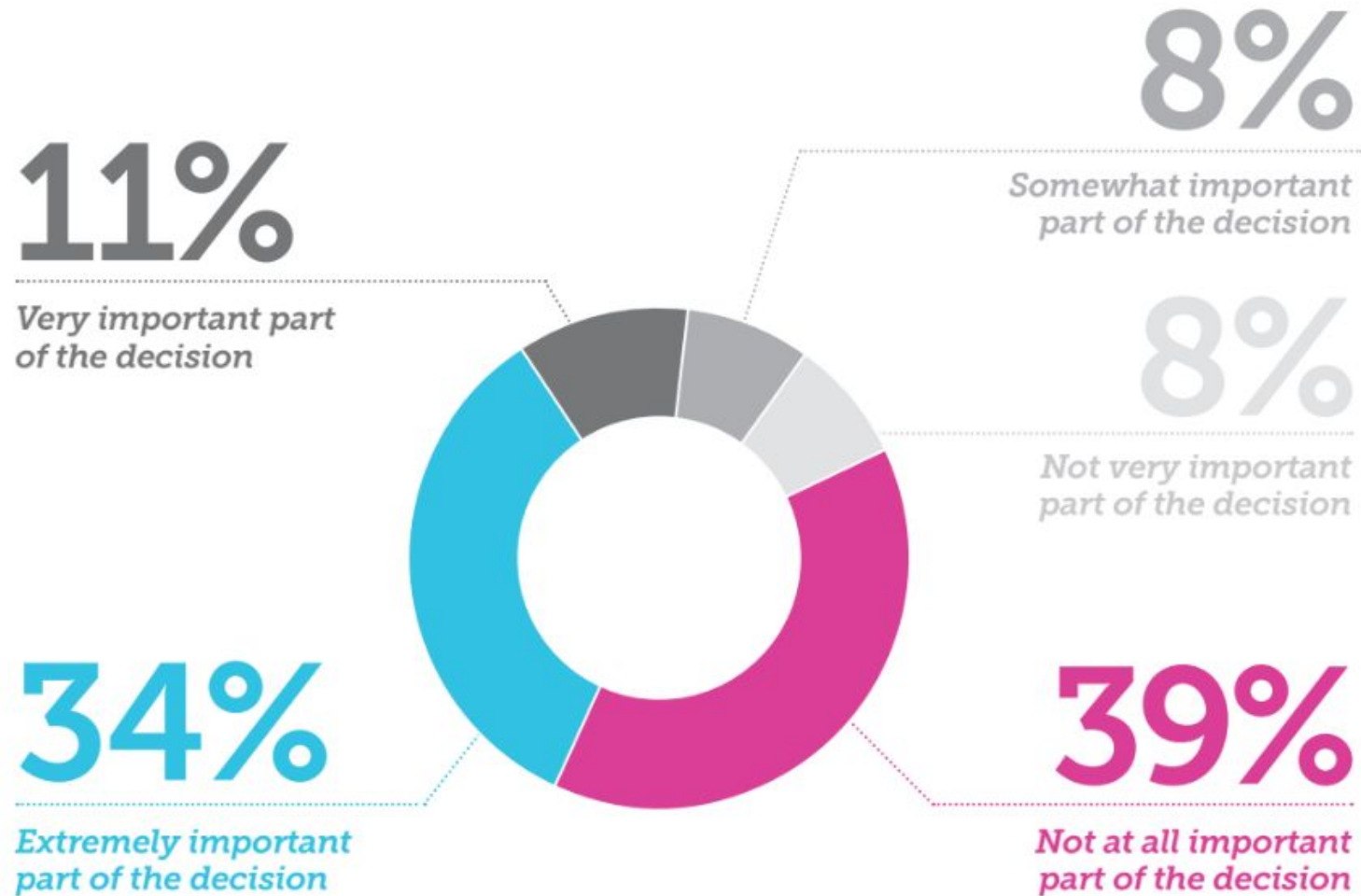
“The general feeling of the school, it is hard to put into words.”

“Did not like elitism & racial segregation of students in social groups.”

“Lack of diversity amongst faculty and senior admin. Bad vibes from students on campus.”

“The commute for our son as a day student would have been too difficult a dynamic for our family.”

Financial Aid & Enrollment



+ Key Takeaways

+
+
+ More families are using a common application, resulting in families applying to more schools, which could lead to a higher admission rate but a lower yield in the future. Academics is deemed the most important factor in application and enrollment decision making; on-campus experience is also important.

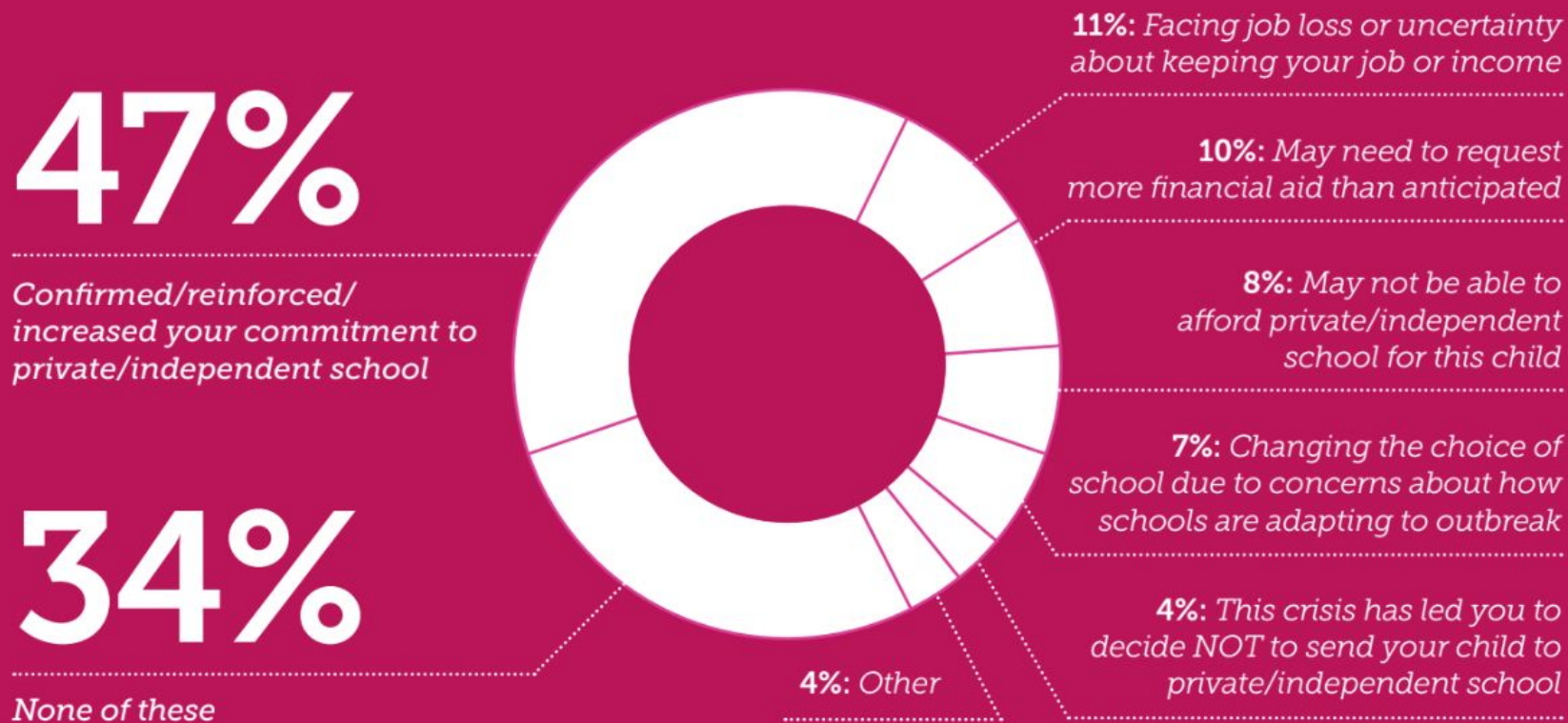


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COVID-19 Impact

IMPACT OF COVID-19

The most prevalent parental response is similar regardless of how parents describe the influence of COVID-19 on their decision-making for the 2020-2021 school year. The crisis has confirmed, reinforced or increased their commitment to private/independent school equally for parents who report COVID-19 as having a very great or great influence on their decision (45%) and for those who describe it having just some, a small or no degree of influence (48%). Beyond this, however, the parents who rate COVID-19 as having a stronger influence are somewhat more concerned about its financial impact, are more likely to be changing schools because of how schools are adapting (15% vs. 1%) and are even a little more likely to have decided against sending their child to private/independent school (8% vs. 2%).



Additional Impacts

“Not sure that I want to pay tuition for virtual learning.”

“Hope that pandemic doesn't prevent our child from being able to live on campus boarding experience.”

“We were initially concerned that we would pay private school tuition for an online education.”

“We're keeping child in indep school AND due to job changes are going into savings to make it work.”

“Concerned for the decision of the private school to attend classes in person.”

“We have already saved for this year, but loss of income may impact next year.”

“Concerns on overall approach and readiness of the school, but not changing our approach/decision.”

“I did not apply for tuition assistance when I should have.”

“We are concerned about outbreaks and making sure the whole school community is complying with CDC.”



Key Takeaways

For many families the COVID-19 crisis has reinforced or increased their commitment to choose an independent school. Families have concerns about value.



International Families

Boarding schools have a big edge.

International students are three times more likely to apply to boarding schools: 47% applied to boarding schools only compared to 15% of total respondents.

Establish relationships with educational consultants.

Not surprisingly, families of international students are five times (46% vs. 9%) more likely to use an educational consultant or agent.

Demonstrate stellar academics and a path to higher education.

The main reason (53%) that parents of international students are interested in sending their children to schools in the U.S. or Canada is to prepare them for college or university in North America. The other significant reason is that students will receive higher quality education, which was the motivation indicated by 26% of international parents.

Market for the long term. There is nothing impulsive for parents of international students in seeking out schools in the U.S. and Canada. Overall, 80% of respondents said that they had been considering the possibility for a year or more, and 45% have spent two or more years.

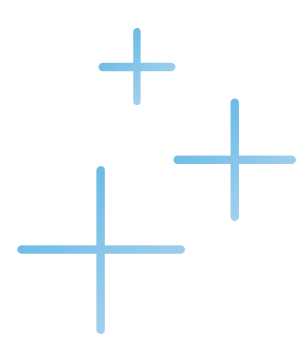
International Family Motivations

Be prepared for lots of competition. Parents of international students research more schools than American or Canadian parents by a wide margin. On average, international families researched 4.9 schools with 40% looking into 7 or more schools. That's a stark comparison to the overall average of 3.9 schools and only 19% researching 7 or more schools.

In an even more stark contrast, families of international students apply to an average of five schools compared to the overall average of 3.2, with 46% applying to five or more schools as opposed to 22% of total respondents.

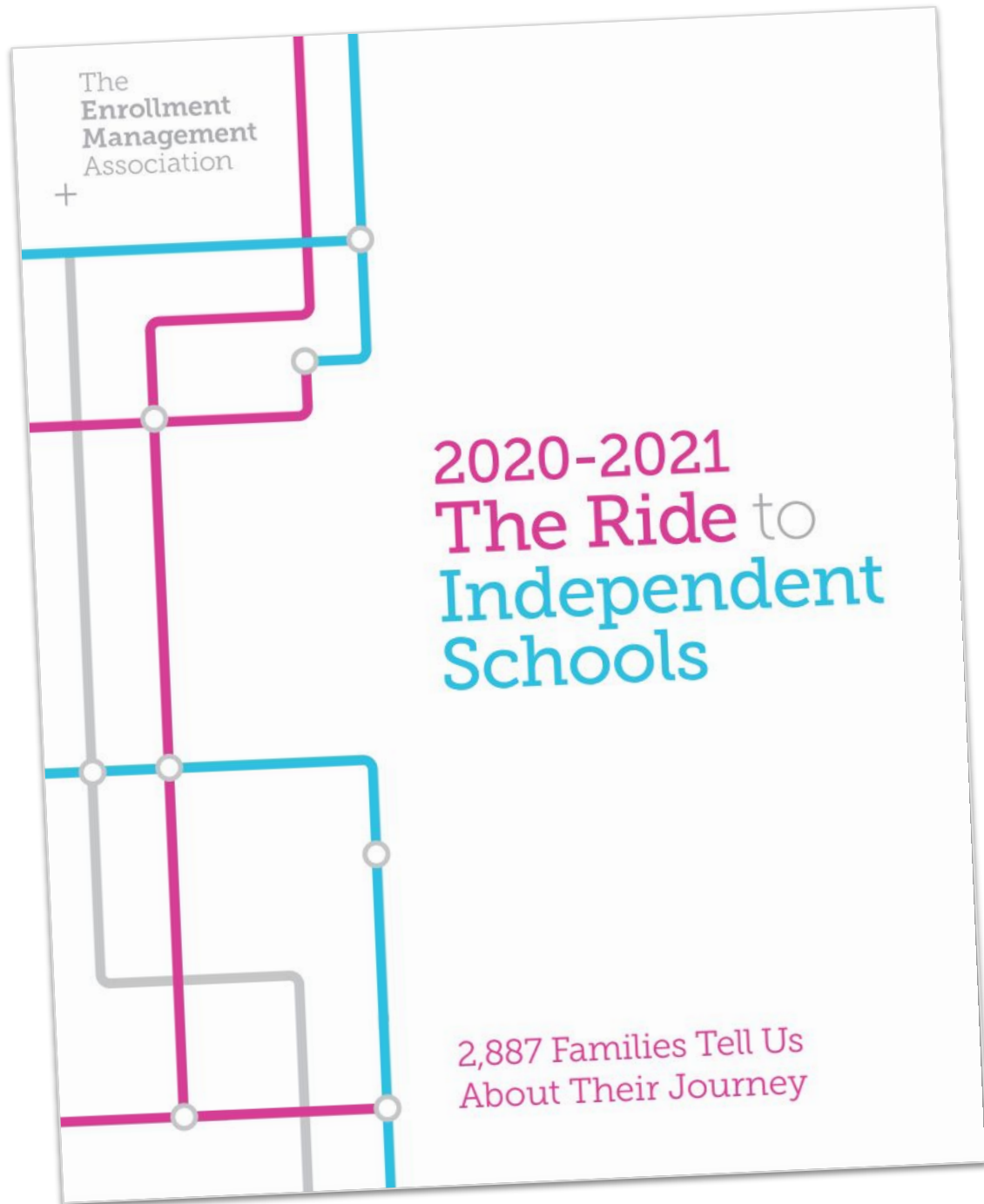
Satisfy health and safety concerns. The biggest concerns of international parents are safety concerns (51%) and fear of bullying, stereotypes and racism (44%). ***Schools should speak directly to their safe and supportive communities and call out specific strategies they are implementing.***

International Family Motivations



Key Takeaways

College preparation is still important for international families. It's not enough to have a caring community. It will be important to communicate your active plans regarding equity, inclusion, and safety for all students but particularly for international families.



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recharge
reunite
recommit

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In-Person Pass: Attend in Seattle in-person!

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ATI & ADI in-person!

A photograph of children sitting at a table, focused on drawing. The image is overlaid with a semi-transparent teal and purple gradient. On the left side, there are three white plus signs arranged in a small cluster. The text 'Questions?' and 'Reflections?' is written in a white, sans-serif font, centered horizontally and partially overlapping the plus signs.

+
+
+
Questions?
Reflections?