The Enrollment Management Association

Back-to-School Flash Enrollment Survey

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The Enrollment Management Association

October 15, 2020

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The outbreak of COVID-19 has resulted in uncertainty in the admissions and enrollment processes of independent schools. The Enrollment Management Association (EMA) analyzed how COVID-19 has affected applications to independent schools by examining the application data submitted via the Standard Application Online (SAO) from March through August 2020 and comparing the 2020 data to that of the past five years. The results showed that overall, more families applied to independent schools in 2020 than in 2019. Although there were fewer applications from March to May in 2020 as compared with 2019, applications surged from June to August (Liu, 2020).

To continue to monitor how things have unfolded in the new school year, EMA conducted a follow-up survey: the back-to-school flash enrollment survey, with the primary focus on enrollment outcomes for the school year 2020–21.

Participants

The survey was sent to 1,000+ EMA member schools via the EMA newsletter on August 20, 2020, and closed on September 18, 2020. In total, 326 schools responded to the survey, representing a response rate close to 30%.

Day school vs. boarding school. Figure 1 is a breakdown of the 326 schools that responded to the survey. As can be seen from Figure 1, the majority of responding schools were day school only (68%), followed by 14% identifying as primarily day school with some boarding students. Boarding schools, including those identifying as boarding school only and primarily boarding school with some day students, accounted for 14% of the participants.

In the following discussion, we combined schools described as day school only and primarily day school with some boarding students under day schools. Likewise, schools identifying as boarding school only and primarily boarding school with some day students were categorized together under boarding schools. This procedure yielded a classification with 82% day schools and 14% boarding schools.

Gender. Figure 2 shows the distribution of schools by gender of attendees: coed schools, girls' schools, and boys' schools. The majority of schools were coed (84%). There were more girls' schools (10%) than boys' schools (6%).

Grade level. Figure 3 contains information on the grade levels served by schools. Responding schools distributed fairly evenly across K–12 schools (33%), upper school only (25%), and other (23%). K–8 schools and elementary schools each accounted for approximately 8% of the sample.

Survey sample representativeness. Survey sample characteristics were compared to those of EMA member schools from the perspective of school type, gender, and grade level. As can be seen from Table 1, overall, the survey sample represented the EMA member schools well. There were a few exceptions, though: The survey sample was slightly skewed in favor of the elementary school only, upper school only, and other (grade level) categories, whereas boarding schools and K–8 schools were under-represented.

Results

The survey questions covered the following topics: retention, enrollment, revenue, challenges in the new admission season, and planned adjustments if any. The findings are discussed below.

Q. Please indicate your retention percentage.

The upper panel in Figure 4 shows that overall, approximately 33% of schools had a retention rate between 95% and 100%, and another 33% of schools had a retention rate between 90% and 94%. About 20% of schools had a retention rate between 85% and 89%, and 10% of schools had a retention rate between 80% and 84%.

The retention rate was further analyzed across day schools and boarding schools. An interesting finding is that boarding schools showed a more polarized pattern than day schools. As can be seen from the lower panel in Figure 4, boarding schools had higher percentages than day schools over the two ends of the scale: 48% of boarding schools reported retention percentages of 95% or higher, versus 31% of day schools; and 11% of boarding schools had retention rates below 79% versus only 3% of day schools. In the middle of the scale, boarding schools had lower percentages than day schools.

Q. Did you hit your enrollment goals for this fall? Did you hit your net tuition revenue goals?

The enrollment results are shown in Figure 5. Data suggested that overall, more than 60% of the schools hit their enrollment goals: They either hit the mark (28%) or over enrolled (36%). It was concerning, though, that more than one-third of schools did not hit their enrollment goals, with 13% of schools reporting being significantly under enrolled. There were no substantial differences between day schools and boarding schools.

NAIS released its 2020–2021 Enrollment Snapshot survey that took place August 10–13, 2020. According to the survey results, "51% of schools report that they have either maintained (19%) or grown (32%) enrollment between 2019–2020 and 2020–2021, while 49% of schools report a decrease in enrollment." Based on these percentages, our results generally agreed with NAIS results, although our results did show a higher percentage of schools hitting their enrollment goals in September. This finding was not surprising, given that families continued to apply to independent schools during July and August (Liu, 2020).

Corresponding to the enrollment results, 63% of the schools hit their net tuition revenue goal, whereas 37% of the schools did not. There was no difference between day schools and boarding schools. A follow-up question asked schools that hit their enrollment/tuition revenue goals to indicate to what they attribute their success. While there were many responses to this open-ended question, a common theme was independent schools' return to campus learning, which was not an option offered by most public schools:

> "Increased demand and lack of solid options in public schools."
>
> "Higher enrollment due to new families coming from public schools and boutique/church preschools."
>
> "Our return to on-campus learning, local public schools going remote. Strong reputation for the distance learning that our families experienced in the spring should we need to go remote. Very clear, consistent information shared with families throughout the entire summer!"

> "Many families who were in public schools last year were not thrilled with how remote learning was handled. As such, they decided to make the switch to independent schools."

It is also noticeable that many schools attributed their success to their marketing strategies, including addressing families' needs quickly, allocating more financial aid, and engaging with the entire community:

> "We were super aggressive in sending out initial offers of admission in April. The timing of which I believe served our market well because people were able to commit in the midst of COVID. We had almost no attrition from new families aside from those who were not able to relocate through the spring and summer. We were also able to allocate more financial aid dollars to help all families given the overage with enrollment."

> "Admitting more students to have higher enrollment numbers and continued communication since the beginning of the pandemic. Lots of personal touches for Beginner (pre-k) families."

> "Families expressed gratitude for the continuation of synchronous learning during the beginning of the worldwide pandemic. We took closer measures to engage with the entire community (students, parents, etc.); and were able to help (even if only minimally) families who expressed need."

Q. Are you experiencing challenges due to (Check all that apply)

When asked to choose reasons they are experiencing challenges, more than half of schools (58%) chose "families unable to afford due to change of financial situation related to COVID-19." Loss of international students was chosen as another challenge by more than one-third of schools.

When the responses were further examined by day schools versus boarding schools, the pattern shifted dramatically. As shown in Figure 6, while “families unable to afford due to change of financial situation related to COVID-19” was chosen as the number one challenge by day schools (62%), this was not the case for boarding schools. Instead, loss of international students was chosen by the majority of boarding schools (65%), followed by “other” (43%) and “families unable to afford due to change of financial situation related to COVID-19” (37%). Clearly, all schools are experiencing challenges for a variety of reasons, but day schools and boarding schools are suffering from different pain points.

Q. What is your greatest challenge for the coming year when it comes to enrollment success?

Most schools indicated “uncertainty regarding how the new academic year will unfold, in-person learning or remote learning” as their greatest challenge for the coming year (68%). Consequently, “communicating with families in light of uncertainties” was another major concern shared by more than half of the schools (57%). In addition, approximately 40% to 45% of the schools indicated that helping the school define realistic and achievable enrollment goals and balancing enrollment and net tuition goals could be challenging. The results are presented in Figure 7.

Q. How have you adjusted your admissions process for the coming year?

In order to deal with the challenges for the coming year, schools have adjusted their admissions process from a variety of perspectives. As can be seen from Figure 8, 70% to 89% of schools chose the top three adjustment strategies, which were all related to offering some kind of virtual activities: virtual interview, virtual events, and virtual open campus. Around half of schools will offer live chats to allow students and parents to ask questions. In terms of testing practice, about one-third of schools plan to adjust standardized admission testing practice by moving to either test-optional (27%) or test-blind (5%) policies.

Q. What is your greatest opportunity for the coming year when it comes to enrollment success?

When responding to the last survey question, "What is your greatest opportunity for the coming year when it comes to enrollment success," more than 80% of schools thought that "increased interest from families enrolled in public schools" could be the greatest opportunity. In addition, "ability to rethink how our school delivers instruction" was also considered by 55% of schools (Figure 9).

EMA recently conducted a set of application analyses, one of which was based on applicants' current school type. The results showed that in general, the independent school application funnel has been narrow: Only one-third of the applicants are from public schools, while more applicants are from the independent school community. The pandemic could serve as an opportunity for independent schools to enlarge the application funnel and recruit more students from public schools by making thoughtful marketing campaigns promoting independent schools' strong academic programs, the quality of their in-person learning, their extracurricular activities and programs, the school atmosphere, and the pursuit of excellence.

Summary

The main survey findings may be summarized as follows:

Enrollment. Overall, more than 60% of schools hit their enrollment goals. Still, about one-third of schools did not hit their enrollment goals.

Challenges that schools are experiencing. While families unable to afford tuition due to a change of financial situation related to COVID-19 was the main challenge for day schools, boarding schools were more challenged by a loss of international students.

Challenges for the coming year. Most schools have concerns about uncertainty regarding how the new academic year will unfold and how they are going to communicate with families in light of those uncertainties.

Adjustments in admissions process. The majority of schools will offer some virtual activities. About one-third of schools are changing their standardized admission test practice by going test optional.

Table 1

Survey sample characteristics

	Survey Sample	EMA Member Schools
School Type*		
Day	82%	77%
Boarding	14%	23%
Gender		
Coed	84%	83%
Single sex	16%	16%
Grade		
EL only (K–5)	8%	5%
ML only (6–8)	2%	4%
UL only (9–12)	25%	17%
K–8	8%	21%
K–12	33%	35%
Other	23%	14%

*Note that the percentages in this table and in the following figures may not add up to 100% due to rounding.

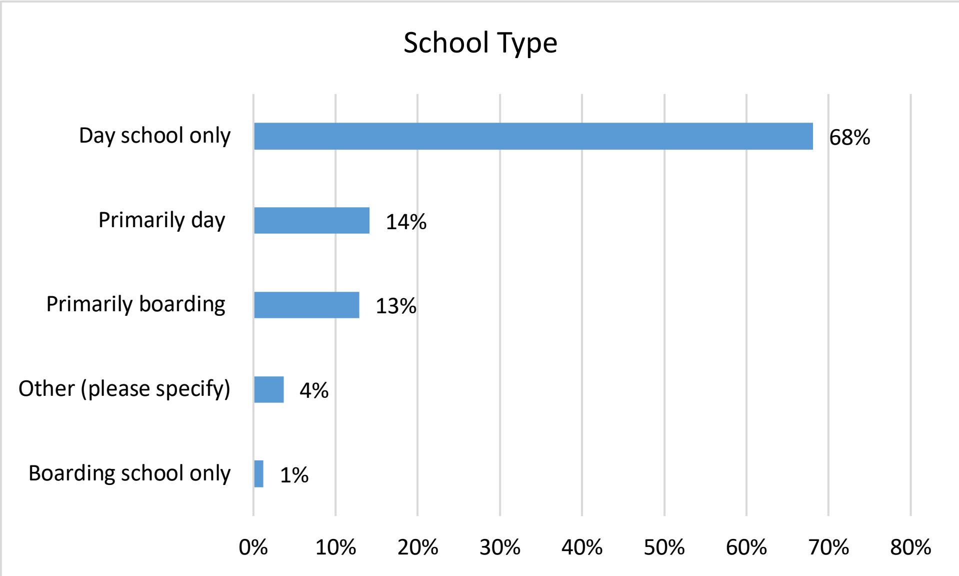

Figure 1. Survey sample characteristics — School Type

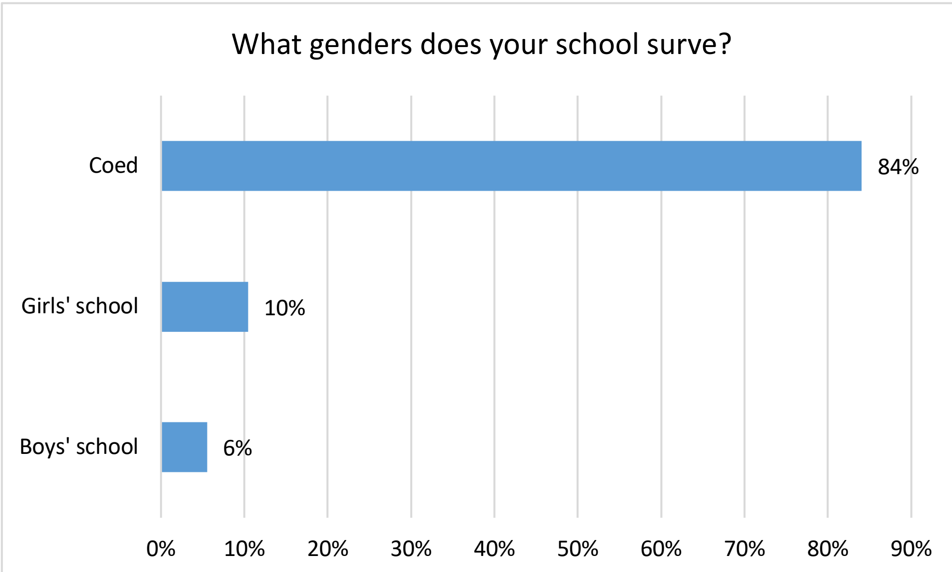

Figure 2. Survey sample characteristics — Gender

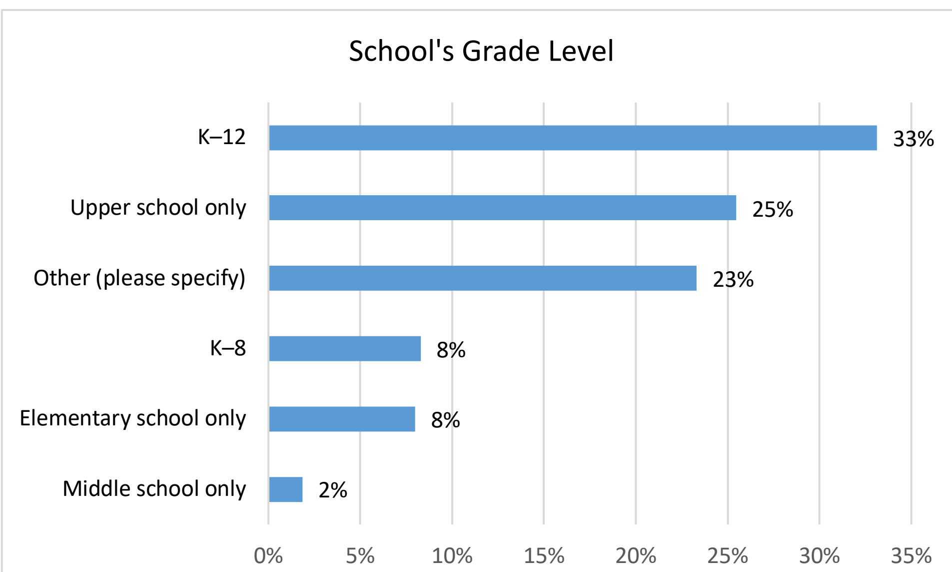

Figure 3. Survey sample characteristics — Grade Level

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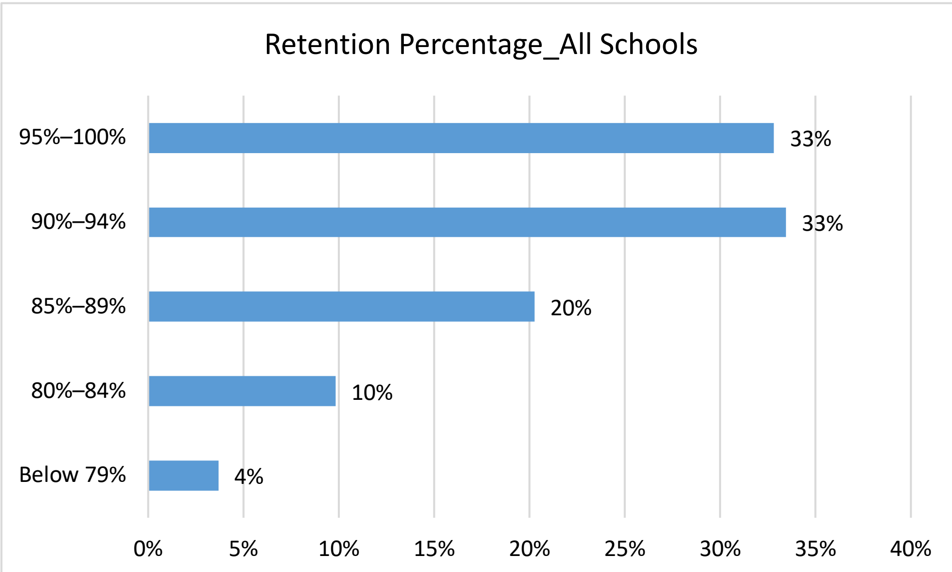


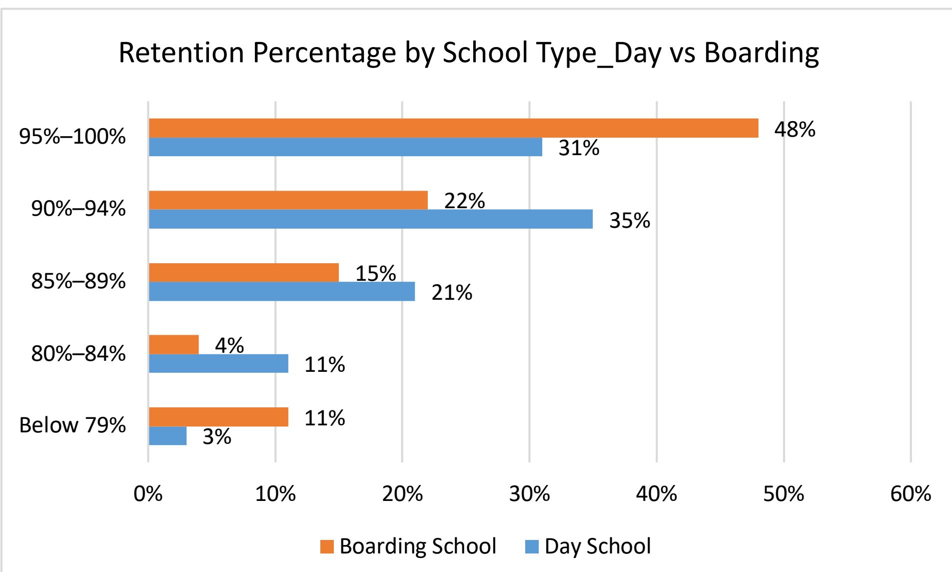
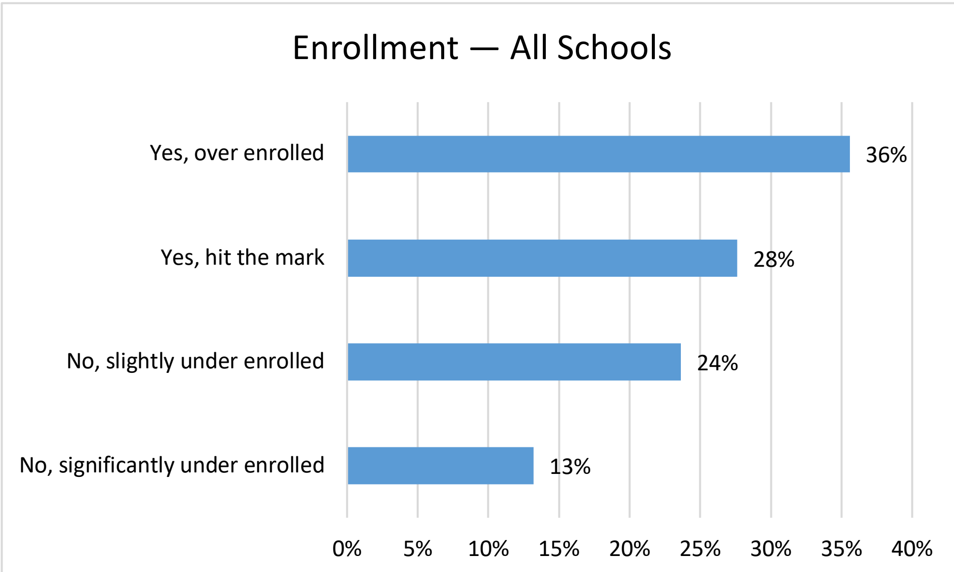


Figure 4. School retentions



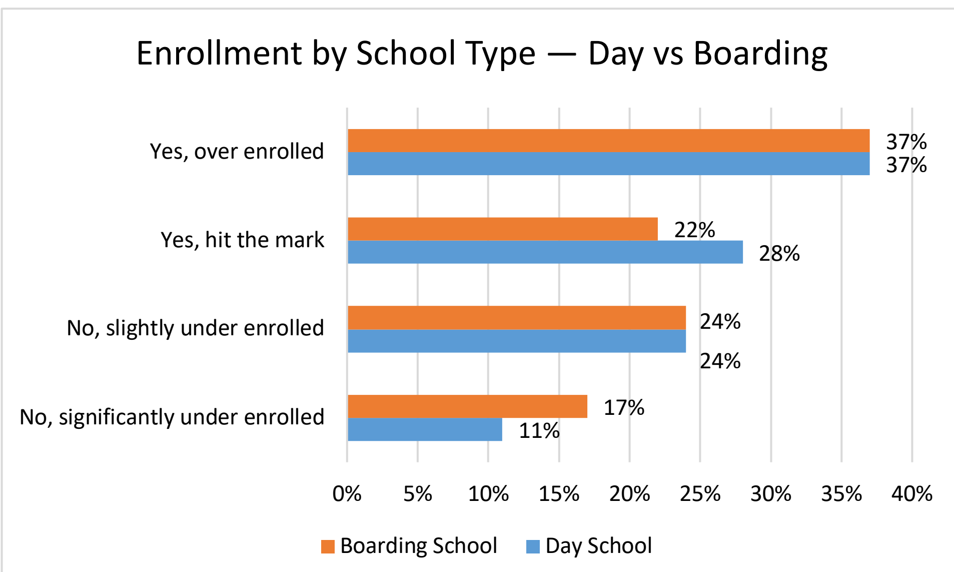


Figure 5. School enrollment

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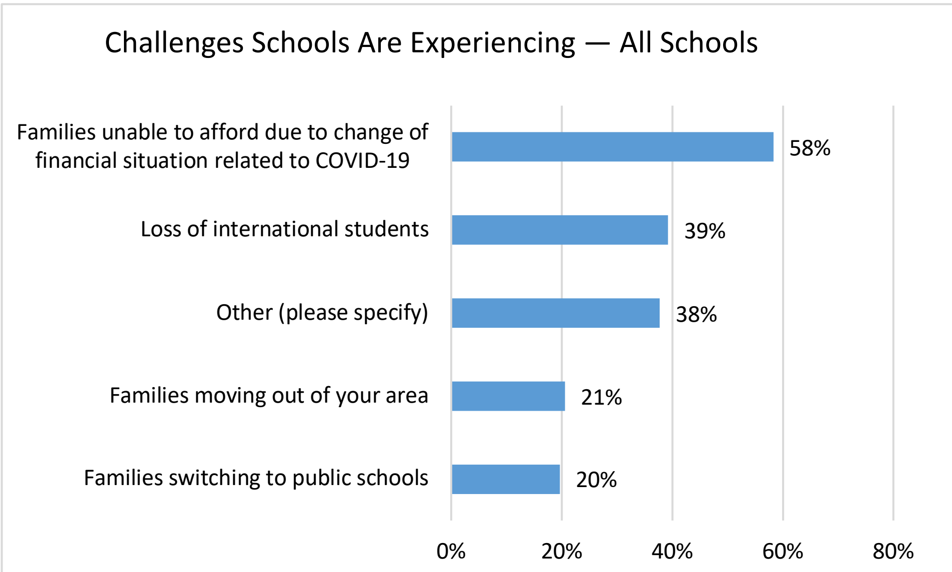

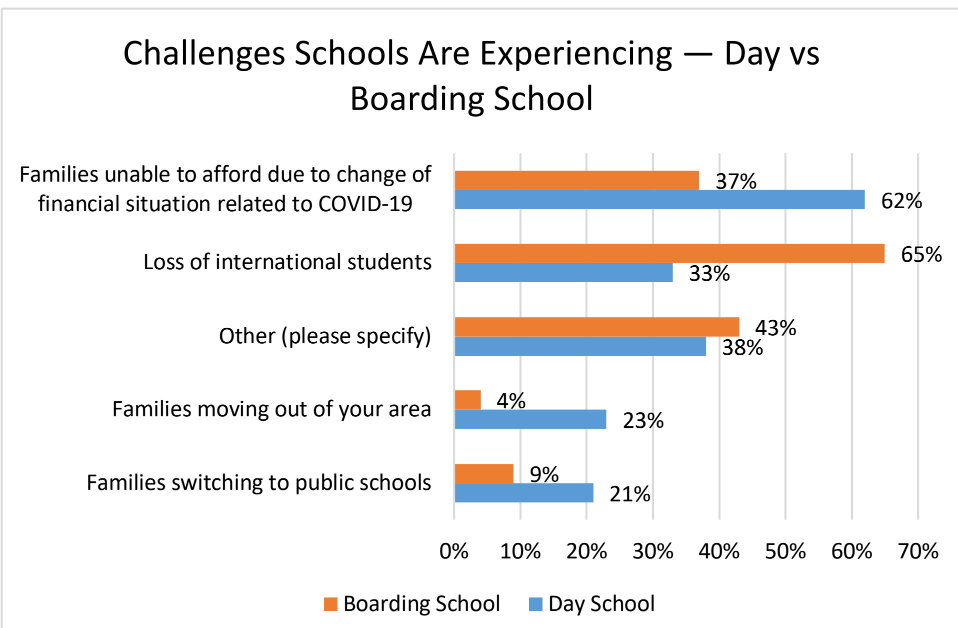

Figure 6. Challenges schools are experiencing

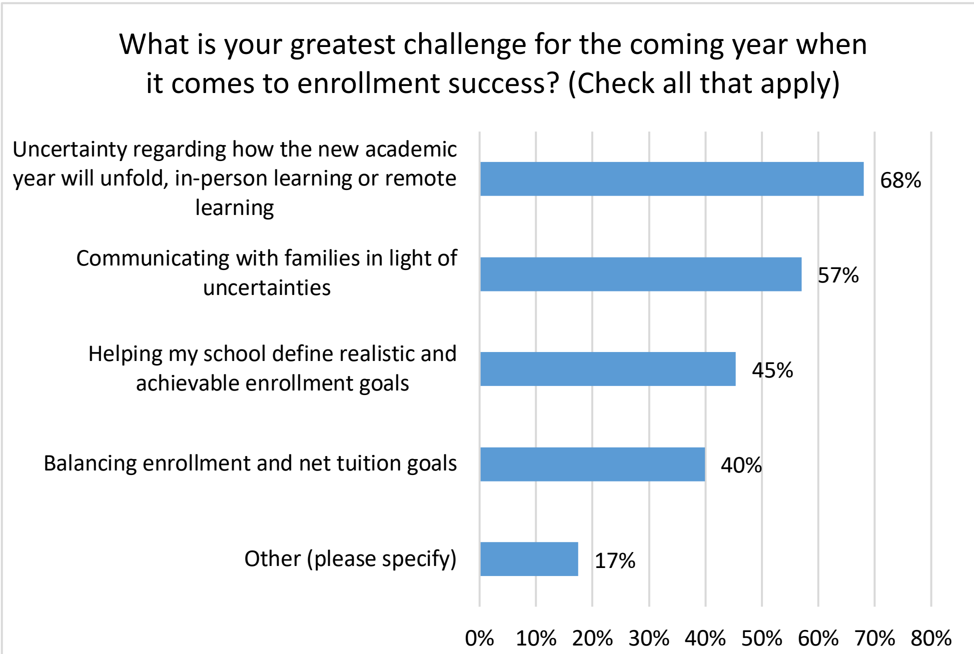

Figure 7. Enrollment challenges in the coming year

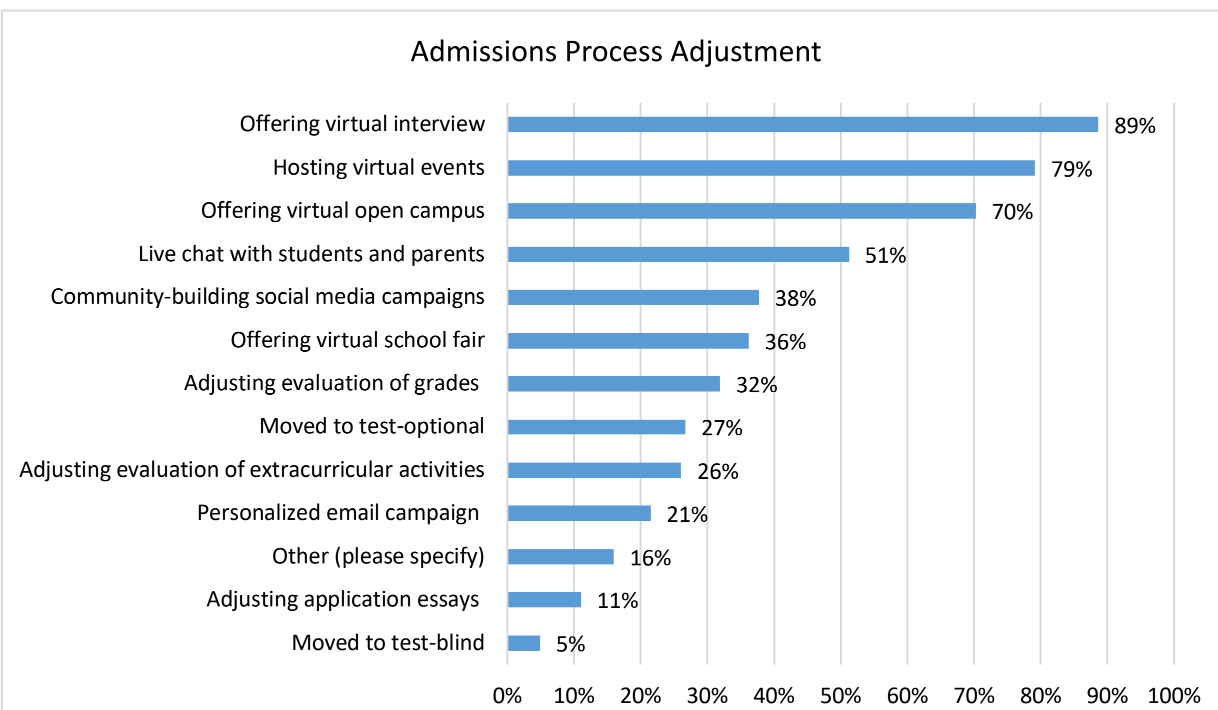

Figure 8. Admissions process adjustment

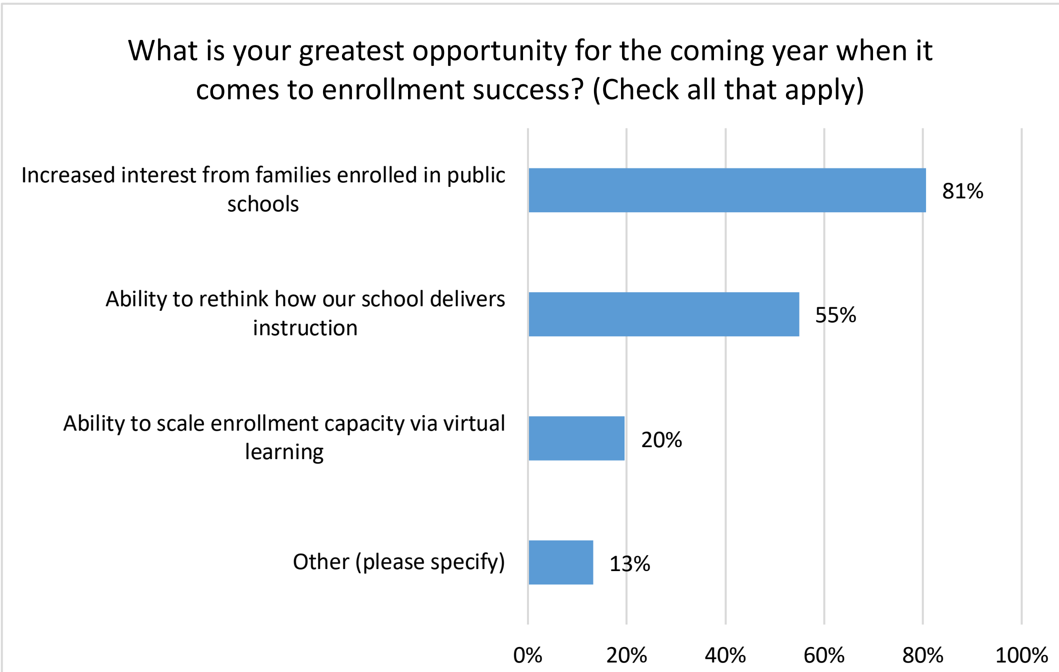

Figure 9. Indicated opportunities for the coming year for enrollment success