Back to School
Flash Enrollment Survey

The Enrollment Management Association
October 2020
Overview of the Survey

• In September 2020, EMA conducted back-to-school flash enrollment survey, with the primary focus on enrollment outcomes for the school year 2020–21.
Survey Sample

326 schools responded to the survey

Representing approximately 30% of EMA member schools

82% Day schools

14% Boarding schools
Retention Rate

- **33%** between 95% and 100%
- **33%** between 90% and 94%
- **20%** between 85% and 89%
- **10%** between 80% and 84%

Standard Application Online Data, 2020 Compared to 2019, Source: EMA
Retention by School Type: Boarding Schools Showed a More Polarized Pattern

- 48% of boarding schools reported retention percentages of 95% or higher, versus 31% of day schools;

- 11% of boarding schools had retention rates below 79% versus only 3% of day schools.
Did You Hit Your Enrollment Goals?

- 36% over enrolled
- 28% hit the mark
- 24% slightly under enrolled
- 13% significantly under enrolled
Did You Hit Your Net Revenue

63% Yes

37% No
“Increased demand and lack of solid options in public schools.”

“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!”

“Higher enrollment due to new families coming from public schools and boutique/church preschools.”

“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.”

“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.”

“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.”

“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.”
Day Schools and Boarding Schools are Experiencing Challenges, but Suffering from Different Pain Points

- **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%)

- **Loss of international students** was chosen by the majority of boarding schools (65%)

![Challenges Schools Are Experiencing — Day vs Boarding School](chart.png)
Uncertainty Regarding How the New Academic Year will Unfold, In-Person or Remote Learning, is School’s Greatest Challenge for the Coming Year

- Most schools (68%) indicated “uncertainty regarding how the new academic year will unfold, in-person or remote learning” as their greatest challenge for the coming year.

- Consequently, communicating with families in light of uncertainties” was another major concern shared by more than half of the schools (57%).

- 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.
Adjustments in Admissions Process

- 70% to 89% of schools made adjustment strategies, related to offering some kind of virtual activities.
- Around half of schools will offer live chats to allow students and parents to ask questions.
- About one-third of schools plan to adjust standardized admission testing practice by moving to either test-optional (27%) or test-blind (5%) policies.
Increased Interest from Students Enrolled in Public Schools Could be the Greatest Opportunity in the Coming Year

- More than 80% of schools thought that “increased interest from families enrolled in public schools” could be the greatest opportunity in the coming year.

- Marketing campaigns to recruit more students from public schools: promoting independent schools’ strong academic programs, the quality of in-person learning, extracurricular activities and programs, school atmosphere, and the pursuit of excellence.
Summary

• **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.