2020–21 Independent School Inquiry Survey

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Overview of the Survey

• Is your inquiry and application pace behind this year? EMA is hearing from many admission and enrollment professionals that this is a year "like no other." In October 2020, EMA conducted its 2020-21 Independent School Inquiry Survey, aiming to put data behind that statement and to provide information about trends to schools with empirical evidence.
Representing approximately 30% of EMA member schools

Survey Sample — School Type

- 291 schools responded to the survey
- 82% Day schools
- 15% Boarding schools
Survey Sample — Grade Level

- K-12: 36%
- K-8: 20%
- Upper School Only: 23%
- Other: 10%
- Elementary: 4%
- Other: 0%
Survey Sample — School Location:
93% in U.S.; 5% in Canada
Overall Inquiry Variation Compared to Past Years

- **26%** decreased 15% or more
- **29%** decreased 6% to 15%
- **19%** about the same: b/t -5% and 4%
- **18%** increased 5% to 15%
- **8%** increased more than 15%

Standard Application Online Data, 2020 Compared to 2019, Source: EMA
Boarding Schools’ Inquiries Dropped Substantially Lower Than Day Schools

- Approximately **86%** of boarding schools suffered fewer inquiries, whereas **48%** of day schools experienced an inquiries drop.

- Only **3%** of boarding schools had slightly better inquiries, in contrast to **22%** of day schools.

- **None** of the boarding school respondents had more than 15% increase, whereas **9%** of day schools had that kind of increase.
Overall, the Top Reason for Inquiry Increase: Families Switching From Public Schools

Multiple factors attributed to increased inquiries. Overall, the top reason chosen by most schools (84%) was families switching from public schools. The other two important factors were the increase of domestic families’ interest (40%) and families moving into school’s area (36%).

Sample size for boarding school was too small to examine across day vs. boarding schools on this question.
Overall, the Top Reason for Inquiry Decrease: Chaos of Life With COVID-19/Inability to Plan for the Future

- The top reason for decreased inquiry is chaos of life with COVID-19/inability to plan for the future (76%), followed by families unable to afford (44%) and loss of international students (42%).
Reasons for Inquiry Decrease: Day School vs. Boarding School

- **Boarding Schools**: Chaos of life with COVID-19/inability to plan for the future (89%) and loss of international students (76%) are the top reasons for decreased inquiries.

- **Day Schools**: Chaos of life with COVID-19/inability to plan for the future (72%) and families unable to pay stood out as the top reasons.
Inquiry Decrease: 87% of Respondents Are Planning to Adjust Marketing & Outreach Strategies

Adjusting marketing and outreach strategies:

- 80% — Work with parents of currently enrolled students and use them as ambassadors to their friends and the community
- 54% — Invest in school’s website
- 41% — Work with school counselors and educational consultants to build a bigger list of prospective candidates
Adjusting Marketing & Outreach Strategies: Day School vs. Boarding School

Similarity: Both day and boarding schools chose to work with parents of currently enrolled students and use them as ambassadors.

Difference: Boarding schools are more eager to adopt all possible strategies:

- Working with counselors/consultants: boarding (75%) vs. day (29%)
- Acquiring Student Prospect List from EMA: boarding (47%) vs. day (19%)
Are You Building Enrollment Goals for Next School Year?

80% Yes

20% No
Assumptions Used to Build the Enrollment Models

- **69%** — Increased demands for financial aid
- **45%** — Decreased yield of students, due to uncertainty (economic, global health issues)
- **40%** — Decreases due to COVID uncertainty
- **39%** — Decreased number of international students
- **39%** — Same enrollment as we’ve had in FY21 (this year)
Assumptions Used to Build the Enrollment Models: Day School vs. Boarding School

Day schools and boarding schools used quite similar assumptions to build enrollment models, with one exception: **82%** of boarding schools assumed **decreased numbers of international students** while building their enrollment model, whereas only **29%** of day schools used this assumption.
**Summary**

- **Inquiries.** Overall, about 55% of the schools had inquiries decreased for school year 2021–22. In contrast, only 26% of the schools received increased inquiries. Boarding schools’ inquiries dropped substantially lower than those for day schools.

- **Main reasons for increased inquiries.** Families switching from public schools (especially for day schools), increased interests of domestic families and families moving into the school’s area are considered the top three factors contributing to increased inquiries.

- **Main reasons for decreased inquiries.** Inability to plan for the future due to COVID-19, families unable to pay and loss of international students are the top three reasons for decreased inquiries.

- **Adjustments in marketing and outreach strategies.** Using parents of currently enrolled students as ambassadors, investing in school’s website and working with counselors/consultants to build a bigger prospect list. Boarding schools are more eager to try all possible strategies.

- **Assumptions used to build enrollment models.** Schools anticipate increased demands for financial aid, decreased yield and decreased applications for 2021–22. Most boarding schools assume loss of international students.