

2019

REPORT

# International School Admission Industry

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The  
**Enrollment  
Management**  
Association



# INTRODUCTION

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Dear Colleagues,

In the 2016 *International School Admission Industry Report*, we published the results of our inaugural global survey of international school admission operations. In partnership with ISC Research, we are pleased to present the second iteration of this report, which delves even more deeply into industry trends.

International school admission leaders have always been crucial in securing the sustainability of their tuition-driven schools. Today, their work happens in the context of great change in the education market, the economy, the political environment, and business practice. Their work also happens in the context of great growth; to meet growing worldwide demand, the number of international schools has grown nearly five-fold in the last two decades, according to ISC Research.

This fast-changing and increasingly complex enrollment picture compels international school admission leaders to take their work to the next level. While 20 years ago the admission office was the “hospitality hub” of the school, today it must also be a research hub, a data hub, and a marketing hub. And just as admission professionals must elevate their work, so too should school leaders acknowledge this increased complexity and commit to supporting admission leaders in building the requisite skills.

This report illuminates many of the challenges and opportunities facing the international school admission industry. We hope it informs discussion and collaboration among schools. At The Enrollment Management Association, we look forward to deepening our partnership with international schools by providing more research, tools, training, and networking opportunities.

Sincerely,

A handwritten signature in white ink that reads "Heather Hoerle". The script is fluid and cursive, with the first letters of each name being capitalized and prominent.

Heather Hoerle, Executive Director, The Enrollment Management Association

# KEY THEMES



## **Competition dominates the landscape.**

As in the previous survey, this year's survey respondents report that competition from other international schools is their number one challenge (39%). Following behind are a family's reluctance to disclose children's learning needs (27%) and marketing the school effectively (26%)



## **Many schools aren't meeting enrollment goals.**

Less than two-thirds (60%) of international schools met their enrollment goals, and 35% were still enrolling students after the start of the current school year. Less than half of the schools operate at least a small wait list in one or more grades.



## **Schools must pay more attention to attrition.**

Although more than half of schools report at least some increase in voluntary student attrition, 86% have no formal committee focused on retention. For families, "seeking a more affordable option" is increasingly being linked to attrition. This may be tied to changes in company/third party policies for paying tuition for employees' families.



## **The applicant pool is changing dramatically.**

Three quarters of respondents indicate they've seen changes in the applicant pool in the last five years. They cite more host country students (41%), fewer expat families (36%), and more regional expats (28%). These findings mirror ISC Research market data, which show that today 80% of international school families are from the local community, while 20% are expat families—a dramatic shift over two decades. Also changing is the way tuition is being paid.



## **Word of mouth is critical.**

The recruitment tool regarded most effective is current family referral (95%) and previous family referral (93%), closely followed by school tours (89%).



## **Admission professionals desire learning opportunities.**

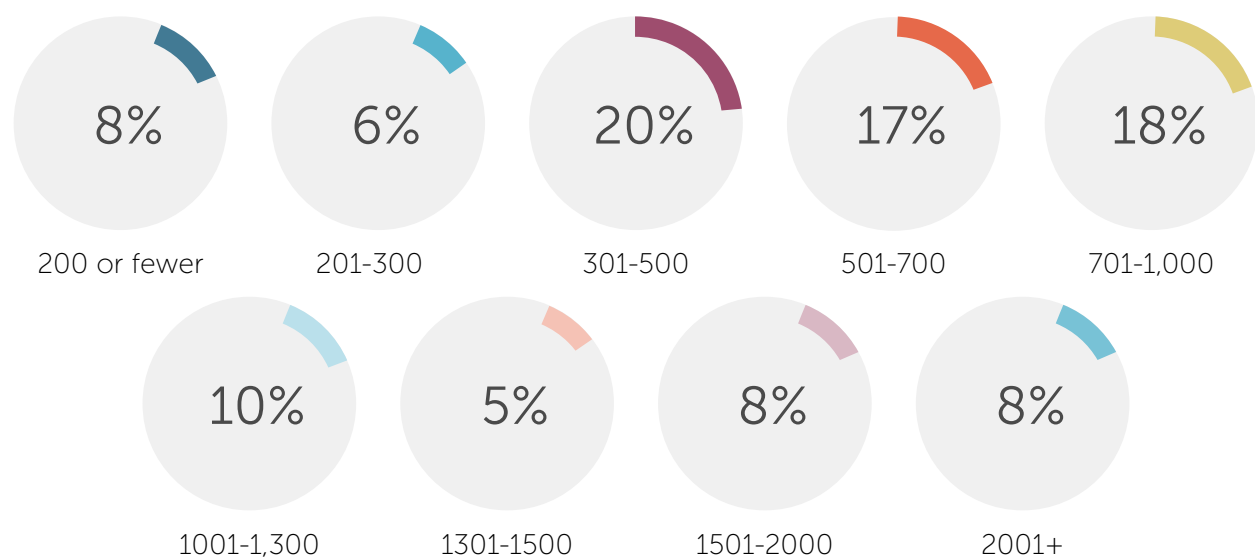
Almost all respondents (92%) are interested in professional training/development. Data-driven decision making, marketing, communications, strategic leadership, and student assessment are the areas of greatest interest. Despite this interest, only 65% have a professional development budget. Many respondents are new to their schools and to the profession, making training even more critical.

# SURVEY RESPONDENTS

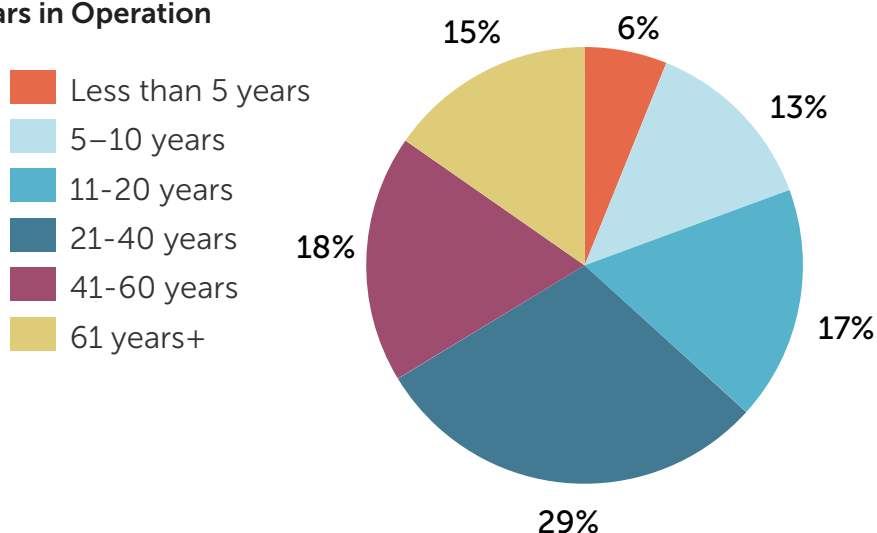
The international schools represented by the survey participants are very widespread geographically. The countries with greatest representation are the UAE, China, Malaysia, and India. The schools are also varied in terms of type, size, ages served, etc.

Although school demographics didn't change significantly from the 2016 report, some differences are notable. While there is no "typical" size for an international school, there are more of the largest category of schools represented here than in the previous survey. The fact that 19% of the schools have been in existence for 10 or fewer years is clear evidence of growth in the market.

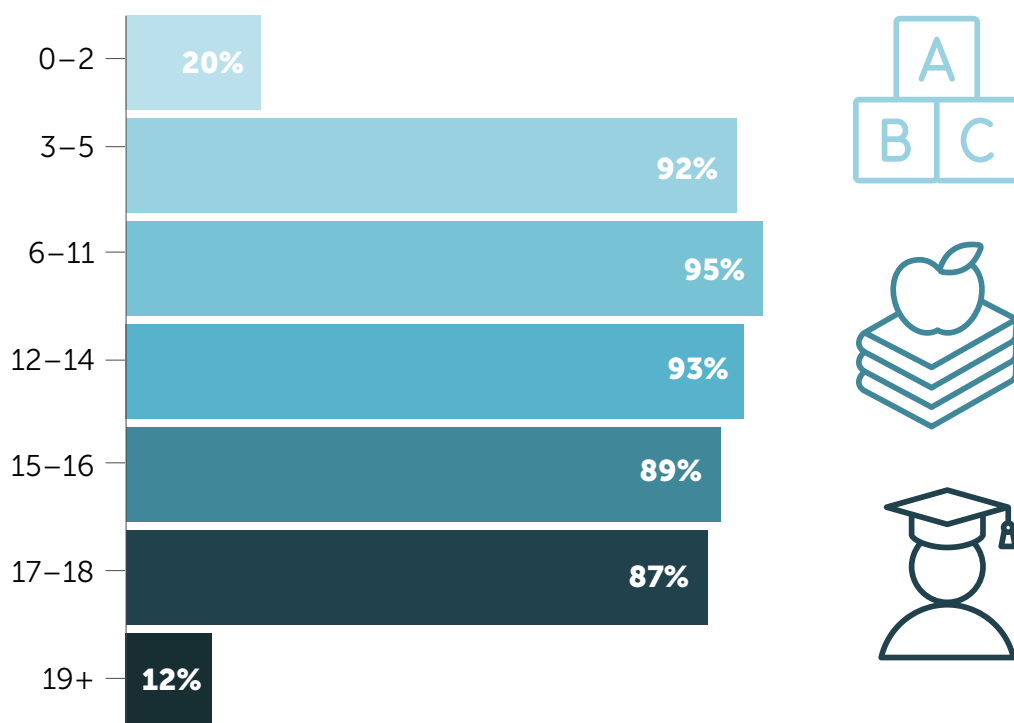
## Enrollment Size



## Years in Operation



## Ages Supported



## Accredited?

**92%** Accredited  
**8%** Not accredited

## Source of Accreditation

CIS (42%)  
 NEASC (21%)  
 WASC (17%)  
 ADVANCED (11%)  
 MSASC (10%)  
 OTHER (45%)

## METHODOLOGY

The Enrollment Management Association (EMA) commissioned Insightlink Communications to conduct this survey to gather information from admission professionals working at international schools. Key topics addressed include school characteristics, operations, activities, and finance relevant to admission as well as the characteristics, opinions, and intentions of the admission professionals themselves. To collect this information, participants were invited by email to complete the online survey. Nearly 400 participants completed the survey partially or in full. The participation rate was 5%.

# SURVEY COMMITTEE

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EMA is grateful to the international school professionals who served on the survey committee. Their expertise strengthened the survey instrument and provided invaluable context and insight.



**Nicholas Kent**, *Associate Head of School, Western Reserve Academy (2019), and EMA Trustee*

Nicholas was recently appointed associate head of school at Western Reserve Academy in Ohio. Previously, he served as deputy head of Jakarta Intercultural School in Indonesia. Prior to this appointment, he spent a decade at Concordia International School (Shanghai, China). Earlier in his career, he also served on the faculty of Seattle Preparatory School (Washington), The Bullis School (Maryland), and The Culver Academies (Indiana). Having worked in both domestic and international schools as well as in boarding and day schools, Nicholas brings a breadth of experience and an expansive perspective about the challenges and opportunities facing independent schools globally.



**Julia Love**, *Director of Admissions, International School Kuala Lumpur*

Before joining ISKL in 2012, Julia spent seven years as the dean of admissions at ACS Egham International School, London. Prior to ACS Egham, Julia worked as director of admissions and financial aid at Alexandria Country Day School and before that at The Madeira School, both in the Washington, DC area. With over 20 years experience in boarding, primary, secondary and international schools, Julia is committed to ensuring that school placement meets the requirements for every child. Julia grew up as an expat child, attending German, British and international schools. Julia has presented at numerous international conferences on topics related to school placement and the educational needs of TCKs in Global Transition. Julia holds a B.A. in Sociology and Education from St. Lawrence University.



**TK Ostrom**, *Director of Enrollment Management and Marketing, United Nations International School Hanoi (2019)*

TK began her career in corporate industries advancing the mission and helping these organizations understand customer service including telling a story about their vision. Since leaving the corporate sector, TK Ostrom has spent the past 15 years honing her skills in admission and related fields in large non-profit

schools in the United States, China, and Korea. She has also provided her expertise as a consultant in the areas of enrollment management and Advancement for international schools throughout the world. TK first served as the advancement consultant on the American School of Guatemala's Strategic Planning Committee before taking on the role as the lead officer for the advancement office in 2016. Beginning in June 2019, TK will assume the newly created role of director of enrollment management and marketing for United Nations International School Hanoi, Vietnam.



**Katie Rigney-Zimmermann**, *Admissions and Marketing Director, Saigon South International School*

Katie has been the admissions and marketing director at SSIS for the past nine years. She has an MBA in International Business and an MA in Secondary Education. She entered the admissions world by chance when the head of her children's school chased her down in the parking lot and begged her to take on the role at a school in Malaysia. She has not looked back since. Being an expat parent has helped her bring a different perspective to her role at SSIS and to the administrative team.



**Dr. David Willows**, *Director of Advancement, International School of Brussels*

In addition to his role at ISB, David is also a regular blogger ([fragments2.com](http://fragments2.com)); presenter & trainer at international events; and author of several books and articles in the field of international school branding, innovation, admissions, marketing, and communications. Today, he is considered a leading practitioner in the field of advancement and continues to be involved in several global network organizations, helping to shape and define the future of the learning business.



**Aimee Gruber**, *Senior Director of Global Outreach, The Enrollment Management Association*

Aimee's decades-long commitment to the admission and enrollment industry gives her a first-hand understanding of the challenges and opportunities facing the modern admission professional. Before joining EMA in 2006, Aimee was associate director of The Association of Boarding Schools (TABS). Prior to her position at TABS, Aimee worked in admission at The White Mountain School (NH), Tilton School (NH), and the Webb School of Knoxville (TN). She served on the board of the Independent Educational Consultants Association Foundation and is a recipient of the Western Boarding Schools Association's Hilton Award for outstanding contributions to the association. Aimee holds a bachelor's degree in communication and anthropology from the University of New Hampshire and a master's of education from Plymouth State University.

# PROFILE OF THE INTERNATIONAL SCHOOL ADMISSION PROFESSIONAL

Women greatly outnumber men in the international school admission profession. This is true industry wide—EMA's 2019 *State of the Independent School Enrollment Industry* survey revealed a very similar gender breakdown in North American independent school admission as that shown in this report. These individuals come to the job with varied types of previous professional experience and via differing hiring circumstances. Compared to the previous

survey, there are more respondents who are very new to their schools and to the profession. Most respondents take on additional duties beyond admission and nearly all are interested in continuing to develop their skills and expertise. A low level of influence persists in terms of their interaction with leadership teams and boards.

## Gender



80% of survey respondents are female

## Reporting Relationship and Previous Experience

Most respondents report to the school head/superintendent/principal (72%). Far smaller percentages report to the CFO (8%), director of advancement (4%), or assistant/deputy head/superintendent/principal (2%). These percentages have not changed significantly compared to the previous survey.

The circumstances of employment varied among respondents: 39% describe themselves as host

country nationals, 32% as local hires (e.g., expat/trailing spouse) and 29% as expat hires.

Each school hiring a new admission professional must take into consideration the specific expertise and experience needed. For example one school may need marketing or data management expertise in particular, based on its goals and/or current staff. Increasingly, as schools serve more local students and families, cultural competency becomes an important hiring consideration as well.

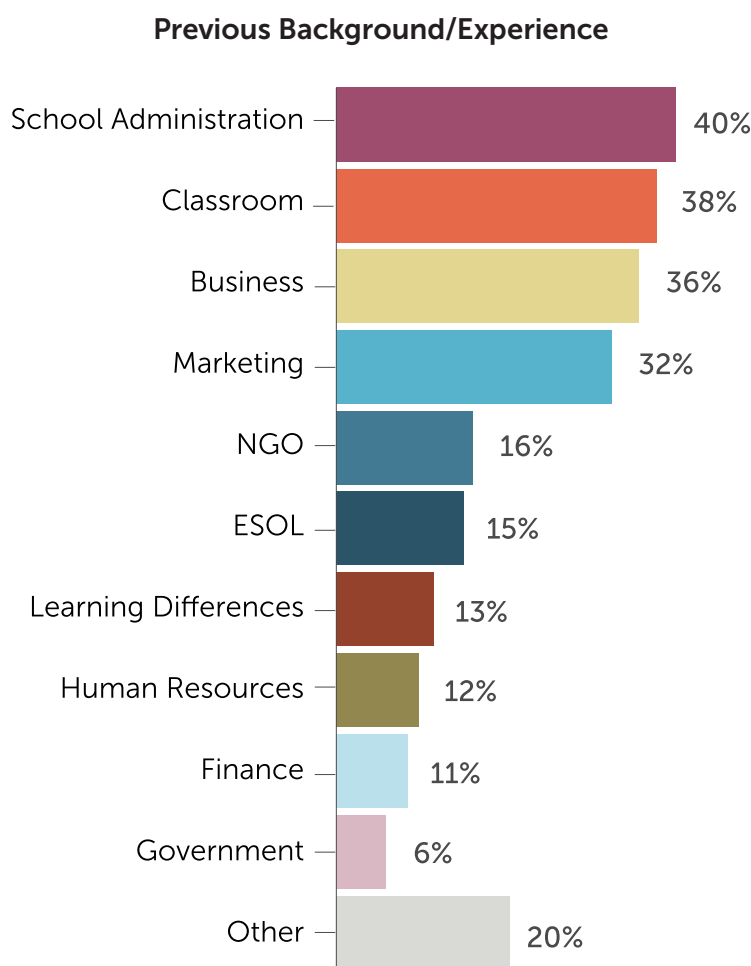


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"We must accept and embrace a much more diverse market of students and educators as we consider the mission and purpose of a school. This means that our cultural competency and linguistic abilities have never been more important whether pursuing work or studies internationally or in national schools providing an international education."

—Jane Larsson, Executive Director, Council of International Schools (CIS)

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The admission leaders surveyed most commonly come to the job with previous experience in school administration, classroom instruction, and/or business/business administration. Note that 15% of respondents have experience in working with ESOL students, 13% in working with students with learning differences, and 12% in human resources, three response choices not offered in the previous survey.

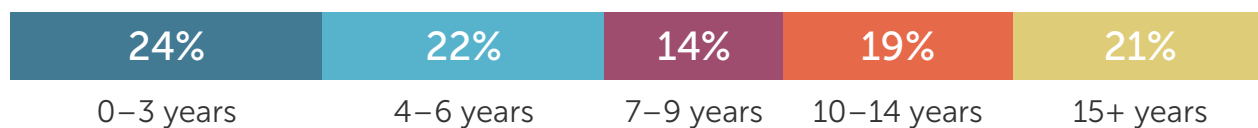
## Job Responsibilities

### Job Responsibilities in Addition to Admission

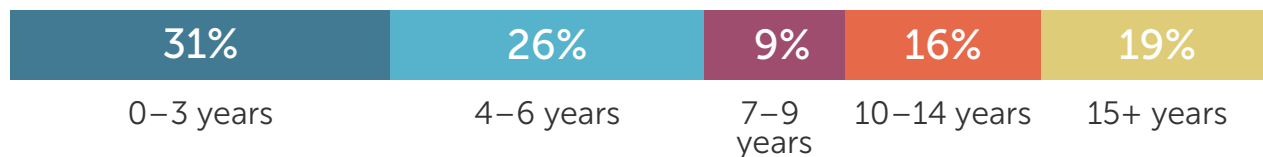
Marketing/Communications	64%
Administrative	61%
Development	28%
Alumni	26%
Advancement	20%
Counseling/Advising	13%
Teaching	12%
Coaching/Extra-Curricular	8%
Other	20%

Admission is not most respondents' *only* area of responsibility. Three-quarters (76%) have other responsibilities. Marketing/communications and non-admission administrative responsibilities are the most typical additional roles in schools of all sizes and in all countries.

### Years of Experience in Admission



### Tenure at Current School



## Experience and Tenure

Compared to the previous survey, more respondents are very new to the profession—24% have three or fewer years of experience compared to 19% in 2016. More than half of respondents are relatively new to their schools, with a tenure of six or fewer years, and a third (31%) are very new to their schools, with a tenure of zero-three years. These results are significant to note. The admission director role in any school has a steep learning curve. In international schools—with fast-changing markets and cultural considerations—this curve is even steeper. Also considering the revenue an admission professional is responsible for, it's wise for supervisors to invest in thorough onboarding for new admission professionals.

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A third of respondents have been at their current schools for three or fewer years.

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## Professional Development

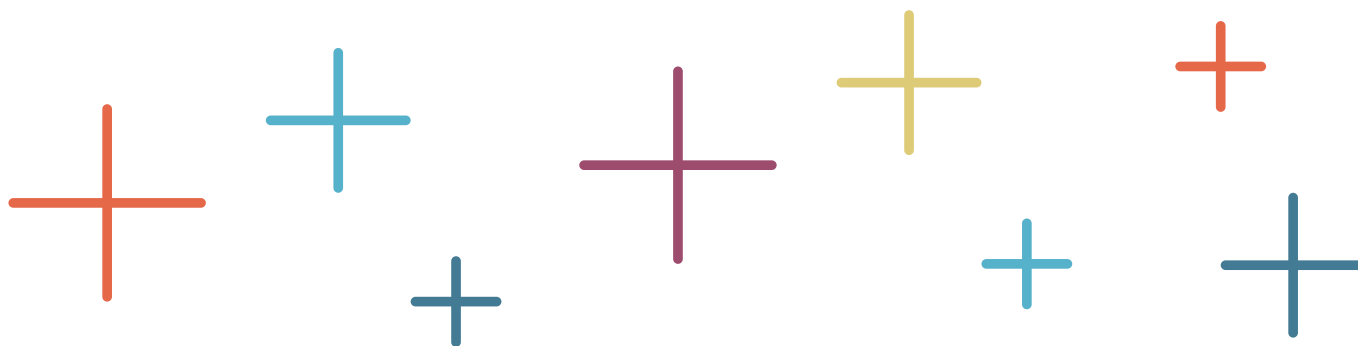
A vast majority of survey respondents (92%) are interested in professional education/training. Data driven decision-making (68%), marketing (67%), and communications (64%) top the list of areas of interest for skill development, followed by strategic leadership (58%) and student assessment (49%).

Despite this great interest, only 65% of respondents say they have a budget for professional development. While this reflects an increase compared to the previous survey (59%), there is a still a wide gap between interest and available budget. Two-thirds of respondents (63%) feel there are professional development opportunities in their regions.

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92% of respondents are interested in professional development, but only 65% have a budget for it.

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# Four Ideas for Free and Low-Cost Learning Opportunities

## 1 Learn from other schools.



Visit admission offices at other local international schools in your area to learn about their operations and marketing efforts. If your local competitive landscape makes that unrealistic, plan a visit to a school in another region while you are on holiday.

## 2 Learn from your colleagues.



Does a colleague in the business office have expertise in Excel or another program that would be helpful for you to know in managing data? Does a faculty member have expertise in a local industry that would help you better understand prospective families?

## 3 Learn online.



You'll find many free resources online that will keep you up to date on trends in international schools generally, as well as in admission. For example, check out *The International Admissions Bulletin* ([openapply.com](http://openapply.com)), *International School Leader* ([ismagazine.com](http://ismagazine.com)), and *The Yield* ([enrollment.org](http://enrollment.org)).

## 4 Learn together.



Host a workshop for user groups of a shared technology, for example schools that use the same website platform or database. Or create a local consortium of admission professionals to share marketing insights and resources.

## Admission Consortia: A Profile of SHISAM and BISMACC



*TK Ostrom, formerly the director of admission at Shanghai American School and the International School of Beijing*

The Shanghai International Schools Admission and Marketing Consortium (SHISAM) started in 2006. Beijing International Schools Marketing, Admission, Communications Consortium (BISMACC) started in 2013. The Shanghai consortium is still going strong today.

*The Purpose:* These very competitive schools began these consortia for several reasons. Schools' conference budgets were often limited to directors only, with no formal professional development opportunities for other admission staff. The schools also wanted to join forces to adopt and promote best practices and to form a stronger alliance that would help them all weather the volatile economic and political environment.

*How the Consortia Work:* The schools rotate hosting the biannual meetings. At the meetings, the schools share enrollment trends and discuss environmental/ministry issues. They aim to find ways to bridge resources to gain more meaningful correlation of support on all levels of professional development and other joint opportunities.

*What the Schools Gain:* The admission and marketing staff gain a wealth of knowledge from the yearly collaborations, which also provide them with timely, accurate, and unified data. The data could then be shared with school leadership and boards for better decision-making.

## Future Professional Plans

Concerningly, only about half of respondents see themselves remaining in admission five years from now (52%).

This percentage had fallen from 58% in the previous survey. Slightly more than a quarter (27%) see themselves moving into headship or other leadership positions, an increase from 2016 (22%). Smaller proportions see themselves no longer working in international education (7%), teaching (4%), or doing something else (10%).

It will be important for international school heads and principals to understand how admission office turnover may affect their schools' enrollment outlook and be prepared to support new admission staff in acquiring the necessary knowledge and skills to remain in their position—and be successful.

As David Willows suggests, (see sidebar) it would also be wise to track patterns of turnover and to more intentionally chart out career paths.

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## Tackling Turnover



*David Willows, Director of Advancement, International School of Brussels*

Three Observations to Consider About

Turnover in International Schools:

"First, we have to address the fact that, in many international schools, being an admission professional is a dead-end career. If schools only ever hire locally, there literally isn't anywhere else to go.

Second, we would do well to start collecting more data on where our colleagues end up. What kinds of careers are they jumping into? As we consider the variables of tenure, age, sex, location, do we notice any patterns that help us understand what's really happening out there?

Third, it may also be worth bringing greater definition to the journey of mastering our craft. Those of us who started in enrollment management more than a decade ago bring an entirely different role, perspective, and level of experience to who we were back then. But how do we capture this journey and professional growth in ways that validate who we are and who we are yet to become?"

Read the full blog post at [fragments2.com](https://fragments2.com).

## Level of Influence

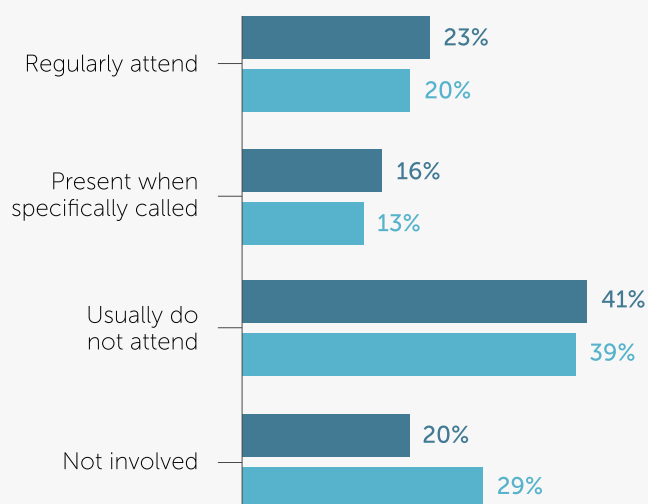
In the 2016 report, we called out a clear disconnect. Although admission professionals are responsible for generating the bulk of a school's revenue, they are afforded a low level of influence in terms of their involvement with the board and leadership team.

Further, we know anecdotally that many admission directors don't set the enrollment goals for their schools—or even have the opportunity to weigh in on them—yet the pressure to meet them is considered one of the top challenges identified in this survey.

While the recent survey results suggest a slight improvement, the degree of influence in these areas remains low. Less than a quarter of admission leaders (23%) regularly attend board meetings, and only four-in-ten (40%) are members of their school's senior leadership team

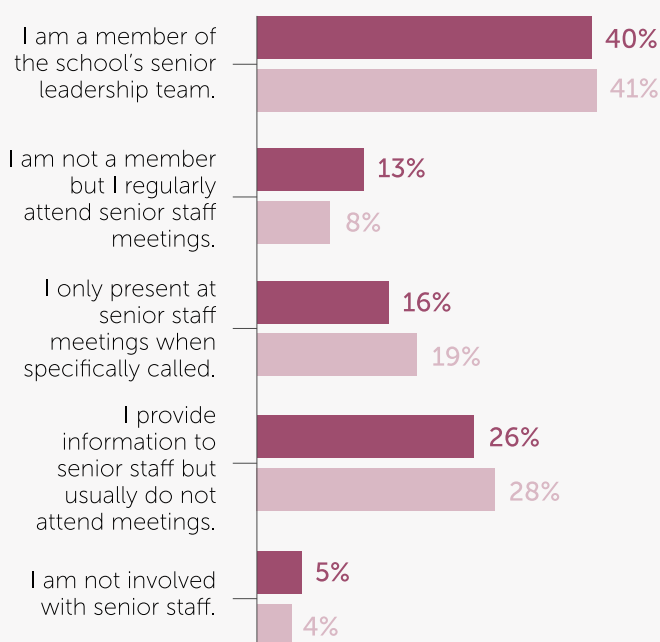
### Involvement with Board of Trustees

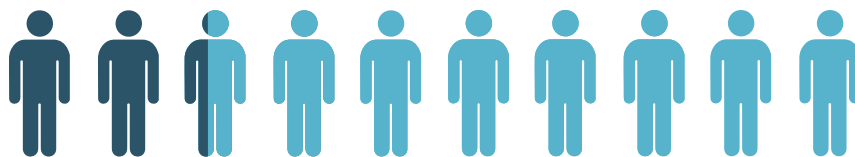
■ 2018 ■ 2016



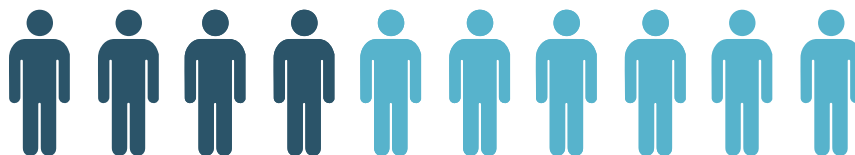
### Involvement with Senior Leadership Team

■ 2018 ■ 2016





Less than a quarter of admission leaders (23%) regularly attend board meetings



Four-in-ten are members of their school's senior leadership team.

Given the importance of admission to an international school's overall financial picture, admission leaders should be given a chance to voice challenges and strategies with the board and senior leadership.

In addition, admission officers can make valuable contributions to leadership-level discussions about forecasting and budgeting, drawing on their deep relationships with internal and external school constituents and their access to important student and market data. Such insight can help schools in continually adjusting their admission processes to meet the changing needs of their market.

Likewise, it behooves admission professionals to actively demonstrate the value they can bring to such discussions. They should be prepared with data and with information on trends that could impact enrollment. As Jeff Shields advises (article on page 16), what's key is making that information meaningful and actionable to school leadership.

"For schools to be sustainable in dynamic environments, it helps to have an admission leader's perspective at the table when key decisions are being made, and it's important to provide ongoing training to school's admission professionals so they can stay abreast of evolving marketing, communications and economic trends."

—Liz Duffy, President, International Schools Services



### Three Tips for Building an Invaluable Partnership with the Business Office



*Based on "What Admission Directors Need to Bring to the Financial Table" by Jeff Shields, president and CEO of the National Business Officers Association*

Admission directors can be valuable partners by taking all the qualitative data they collect and organizing it in a way that makes it meaningful and actionable to the head of school, trustees, and business officers.



**Remember that you possess competitive intelligence that is critical to your school's future success.** Collect and codify it to answer these two all-important questions: Why do your families choose your school? Why do other families choose a school down the street? Frame the information in a way that is accessible, compelling, and actionable for your colleagues. Break it down into a table, chart, or graph. Make your data 'tell a story.'



**Be the 'keeper' of demographic data for your school's market.** Trustees are focused on the future, and your ability to describe and forecast the next generation of students will make you an invaluable partner to them.



**Keep the current year admission statistics (number of applications, visits, waitlists, etc.) top of mind so that others have no doubt that you are the expert and your finger is on the pulse of the school!**

The admission officer and the business officer have a great deal in common in their ability to support the school's decisions and advance its financial sustainability. Translate your expertise into language he or she understands and appreciates, and you'll be invaluable partners as well.





## What To Do In a Crisis: Tips For International School Admission Professionals



*Jim Hulbert, Esq., Partner and Lisa Davis, Senior Consultant,  
The Jane Group*

It's not *if* but *when*. A crisis can occur at your school with little notice. The Jane Group recommends schools have a plan not only for the safety of everyone, but also to minimize damage to the reputation of the school and stakeholders' trust. When a

crisis hits, you have precious little time to assess, formulate a plan, and act.

Here are 12 tips for the admission department to remember:

- 1 The director of admission should be part of the expanded crisis communications team if not part of the core crisis team.
- 2 The admission department, including "front office" personnel, should have clear talking points when prospective families call or visit and inquire about the crisis.
- 3 If the admission director is also the media point-person, know the reporter and confirm the topic. In some countries, the government controls the journalists, which impacts reporting.
- 4 The school's admission department should know the timeline and frequency of ongoing crisis management meetings, especially, but not only, when the crisis occurs during "admission season."
- 5 Be mindful of when communications are sent out. Some communications may need to be delayed.
- 6 Consider whether you will need communications in multiple languages and be prepared to do so.
- 7 Be sure to include newly admitted or prospective families in communications regarding a crisis as appropriate.
- 8 All communications must be in an authentic voice that represents local culture and customs as appropriate.
- 9 Communications need to serve multi-cultural stakeholders by adopting a cultural perspective with inclusive communications.
- 10 Maintain cultural relativity and be cognizant of projecting and observing body language of local as well as all stakeholders' cultures.
- 11 Be mindful and considerate with traditional forms of communications as well as what is posted on social media platforms.
- 12 There are no second chances, no do-overs. There are many factors beyond your control in a crisis; fortunately, there is a lot you can do to maximize your school's chances for not only a good outcome, but one in which the community emerges even stronger.

# COMPENSATION AND STAFFING

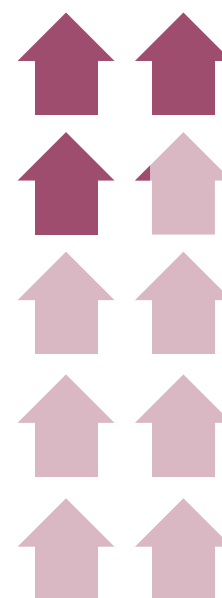
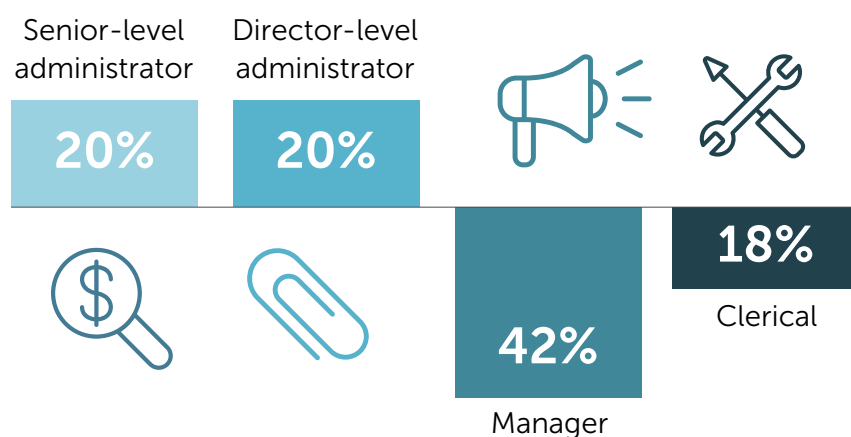
Survey results show that a majority of respondents are paid below other director-level administrators at their schools. Results also reveal lean staffs in international school admission offices.

## Compensation

While the admission leader is accountable for bringing in the majority of a school's revenue each year, admission salaries do not appear to be commensurate with this level of responsibility; 60% of respondents are being compensated below other director-level administrators at their schools. Somewhat encouragingly, compared to the previous survey, fewer are paid at the clerical level (18% vs 22%).

About nine-in-ten (87%) respondents are paid in the host country currency. Just over one-third of the respondents (31%) say their schools offer a housing allowance.

### Pay Scale of Admission Leaders



# Staffing

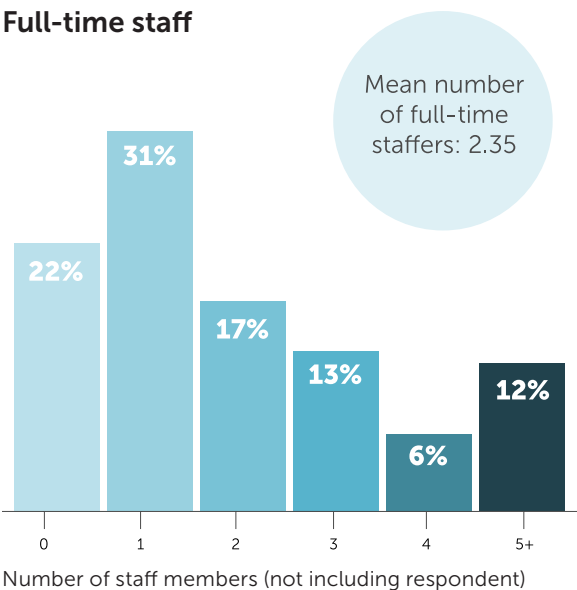
About a fifth of respondents report they have no full-time admission staff besides themselves, and a third have just one full-time staffer. While the overall picture that emerges is that of lean admission office staffs, when compared to the 2016 survey results, there were fewer one-person offices (22% vs 33%) and more schools with larger staffs.

This may reflect a growing realization of the increased importance and complexity of the admission function.

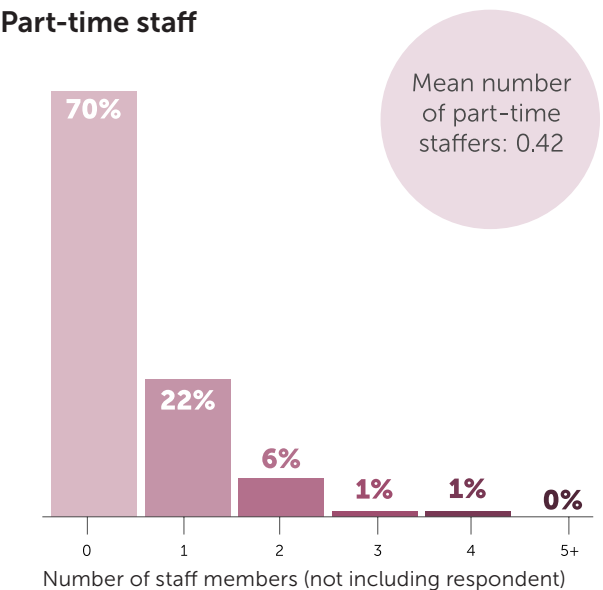
One common higher education benchmark that private K-12 schools around the world are starting to track is cost per enrolled student, including staffing.

When compared to the 2016 survey results, there were fewer one-person offices (22% vs 33%) and more schools with larger staffs.

Full-time staff



Part-time staff



# Budget

As a whole, the existence of admission budgets—and their size as a percentage of overall school budgets—has increased slightly when compared to the previous survey. Forty-four percent of respondents are given an admission office budget to manage. (This compares to 37% in the 2016 report.) At 17% of schools there is no admission budget (in 2016, this figure was 24%). At 39%, the admission budget is 5% or more of the total school budget. A majority of respondents (76%) feel the admission budget they have is large enough to cover their needs.

# RECRUITMENT AND MARKETING

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As competition heats up in the international school market and as the prospective applicant pool changes, schools should measure the effectiveness of their outreach activities and employ more personalized and data-driven marketing tools to attract students.

## Outreach Activities

Mean survey numbers suggest that a typical international school admission office makes two visits each to human resource offices of companies and to corporate relocation companies, visits three “feeder” schools or programs (e.g., preschools), and attends four school fairs. This outreach varies widely by school size and location, however. For example, visits to feeder schools are more common at large schools and at schools in China and the UAE. Visits to corporate relocation companies are most common at larger schools and at schools in China and India.

As these endeavors are often costly and time-consuming—especially for small offices where time spent away from the office is difficult to manage—each school should measure its own return on investment for each outreach activity. They should be weighed against opportunities to invite influential community members (real estate agents, preschool directors, relocation agents, and embassy personnel, for example) to campus for community events such as plays or athletic matches.

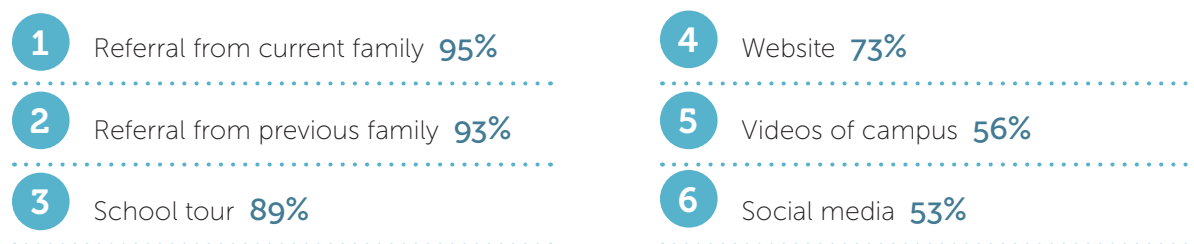
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“International school families in today’s world have many choices for their child’s education. With this increased competition, it is important that schools work hard at demonstrating their unique selling proposition every single day.”

- Katie Rigney-Zimmermann, Admission and Marketing Director, Saigon South International School

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## Most Effective Marketing Tools



## Marketing Tools

International schools rely heavily on word of mouth marketing: 95% of respondents said referrals from current families are extremely or very effective, while 93% said the same about referrals from previous families. Given the importance of these referrals, admission offices should consider formalizing and enhancing engagement and ambassador programs. (See article on page 24)

Following closely after referrals, use of school tours was ranked as extremely/very effective by 89% of respondents. The EMA report *The Ride to Independent Schools* reinforced just how important in-person opportunities are to families' decisions to apply and enroll. (See sidebar.)

Websites were ranked as extremely/very effective by a sizable 73%. Schools are becoming increasingly savvy about weaving website messaging and functionality into their overall admission strategy. The International School of Brussels' website homepage features one direct question—"What are you looking for today?" This simple question puts the focus on meeting the web visitor's needs. Behind the scenes, this search box is tied into an extensive well-thought-out use of keywords. (See article on page 22.)

Notably, the perceived effectiveness of campus videos and social media has grown significantly when compared to the 2016 report—from 49% to 56% and 32% to 53%, respectively. Likely this is because schools are taking advantage of these relatively inexpensive tools to tell the story of life on campus, especially to prospective families who cannot visit in person. (See [The Yield](#) profile of a successful video campaign by King's Academy in Jordan.)

Use of relocation agents has fallen in perceived effectiveness from 47% to 40% as has use of human resource managers (from 33% to 21%). The drop likely reflects shifts in the applicant pool (fewer expatriate families and more local families).



### What's Important to Prospective Families: Takeaways from *The Ride to Independent Schools*

In a 2017 EMA survey of 2,700 prospective independent school families, we unearthed key themes that can inform all private schools' recruitment and marketing efforts.

#### **1. Academics are most important to families, but character is not far behind.**

Nearly all (97%) families surveyed said they were seeking to develop in their children a love of learning and to provide an education that will challenge them. But in addition, 92% rated developing a strong moral character as equally important.

#### **2. The application process must be clearer and smoother.**

A relatively small—but still important—portion of families surveyed reported concerns about the application complexity, and some made the decision not to apply because of it.

#### **3. Affordability is by far the primary concern of families applying to North American private/independent schools.**

As competition grows and as global companies begin to change their policies about covering educational expenses, more and more families applying to international schools will have to consider this affordability/value question as well.

#### **4. Little things matter, especially in person.**

Prospective families' level of commitment to private, independent education increases significantly following in-person visits. Yet survey results and comments also remind us that during the application journey, families have strong positive and negative emotional reactions, especially to in-person experiences.

## Five Key Elements of an Admission Landing Page



*Based on “The Anatomy Of The Perfect Admissions Inquiry School Landing Page” by Mia Major, Content Marketing Manager, Finalsite*

What does “landing page” mean exactly? From an analytics perspective, it’s any page someone lands on from search. From a design perspective, it’s the page in-between your homepage and interior pages. From a marketing and admission perspective, it’s a page that is specifically designed to drive conversions (that is, inquiries, applications, open house replies, etc.).

Here are the five most important elements of an admission page that can yield an increase in conversions.

### 1 A Value Proposition

Your school’s value proposition should dominate the top of the page. It will be the first thing a site visitor’s eyes glance over before determining whether or not they should stay on the page. This is your chance to make a statement about why someone should apply to your school.

In other words, the header on your landing page shouldn’t be “Apply Now,” or “Admission.” You’re throwing a grand opportunity out the window. Use it to say something about the experience at your school.

See a good example on [Inter-Community School Zurich’s website](#).

Your landing page value proposition should consist of three main elements:

- **A header:** Your main value proposition
- **A sub header:** A secondary statement that provides additional information
- **A reaffirming statement:** Located about one-third or one-half of the way down the page, this statement is intended to reaffirm the value

proposition after they’ve scanned the page for additional content

### 2 A Compelling Photo or Video

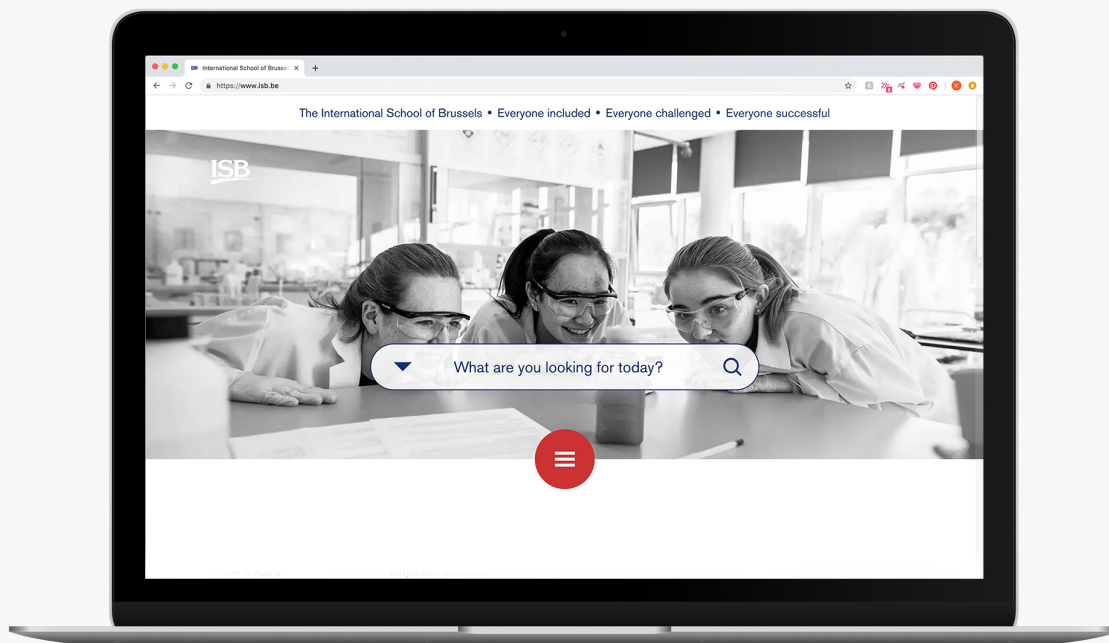
Landing pages with video have higher conversion rates than those that don’t—up to 80% higher, actually—so incorporating an admission video is key. However, if you don’t have the budget or resources to put together a snazzy admission video that really pulls on those heartstrings, opt for a photo or series of photos that would have the same effect.

See a good example on [Shrewsbury International School’s website](#).

### 3 A Quick List of Benefits

Do you have the best STEM program in the region? What’s your student-to-faculty ratio? How many extracurricular activities do you have? Think about the biggest and most important “wow” factors that set your school apart, and make them easy-to-scan. Use a bulleted list or infographic to accomplish this.

See *Western Academy of Beijing’s* use of an [infographic](#) and a [list](#).



*International School of Brussels' home page focuses on a simple, direct question, 'What are you looking for today?'*

#### 4 Social Proof

Bring in the testimonials! Whether you choose to have video or text testimonials, incorporate social proof that your school is worth the investment. Quotes from parents, students, faculty and alumni are key to increasing conversions, as over 70% of Americans say they look at reviews before making a purchase/decision, and 63% of consumers are more likely to make a purchase/decision from a site that has ratings and reviews.

See a good example on [Shanghai American School's website](#).

about four-six form fields. Then, have the call-to-action button on the form be the only call-to-action on the page. A good inquiry page will not send site visitors elsewhere—meaning don't incorporate other calls-to-action or options. The less options, the higher the conversion.

Once prospects have submitted the form, you can redirect them to a "Thank You" page. On this page, you can incorporate additional calls to action and content to keep their journey going.

See a good example on [St. George's British International School's website](#).

#### 5 A Simple Form With a Call to Action

Rather than directing prospective students off your site to another form from your SIS, incorporate a form on the landing page with

## Grow Your Greatest Asset: How to Increase Word-of-Mouth Referrals



*Deborah Janz, CEO & Lead Strategist, IMPACT Marketing International*

The EMA International School Admission Industry report shows that referrals from

alumni and current parents are perceived as the most important marketing tools. How can you encourage and expand on what is already delivering on results?

### Using Personas in Word-of-Mouth Referrals

You are likely familiar with the concept of creating and using “personas” to differentiate the types of families a school is best suited to serve. Doing so helps everyone in the admission, marketing, and communications offices collaborate on how best to communicate with—and serve the unique needs of—each family from that first inquiry through to enrollment. But, how can you use personas to increase word-of-mouth referrals?

In order to be useful, personas must consist of far more detail than can be fit on a recipe card with demographics and stereotypes. Personas are different from target audiences (large groupings like “current parents” or “alumni”) in that personas get to the heart of the individual’s desires or fears or problems they are looking to solve. You know what parents care deeply about, what they want for their children, what’s most important to them as they invest in the future. You also know which programs alumni deem most valuable in the “real world,” their favorite teachers, campus hangouts, and stories.

This insight is critical not only in identifying persona, but in forging ongoing relationships. We have all memorized the adage, “people support those they know, like, and trust.” That’s how word-of-mouth referrals are created, from having an ongoing relationship, a conversation, derived from a sense that the referring human is cared for, empathized with, and served in some way.

### One School’s Story: Alumni Engagement Campaign at International School Tanganyika

International School Tanganyika (IST) is an International Baccalaureate school in Dar Es Salaam, Tanzania. IST wanted to build a better relationship with alumni and generate more word-of-mouth referrals from this group. Alumni maintained their own connections through social media but were, for all intents and purposes, disconnected from the school. How could the school engage alumni and build a community at this time?

This objective possessed two primary challenges:

- 1 The school hadn’t maintained a strong database of graduating and non-graduating alumni. In essence, they were starting from scratch.
- 2 With the General Data Protection Regulations (GDPR) and other privacy regulations, they couldn’t simply start emailing the list they did have.

An interactive timeline was created on IST’s website. Rather than a static infographic, the viewer can slide forward and backward in time, listening to audios, reading blogs, and watching videos from the school’s history. Within the first 15 days of the campaign, the infographic



page had 947 visits, 30 new alumni members, and 1,120 Graduway (alumni network software) portal page views.

### **Don't Be a One-Hit Wonder: Maintaining Relationships Over the Long Haul**

A mistake many schools make is to create one outstanding campaign (like the infographic) and then stop all efforts until the resulting activity slows down or stops.

People make referrals when they feel they have a strong relationship with the organization. Relationships are created and maintained over the long haul, with consistent, caring, and service-oriented communication. After all, what kind of friend starts a conversation and then walks away as soon as the other person responds? Monthly emails and regular social interactions are integral to bridging the communication gap between engagement campaigns.

A characteristic of the IST alumni persona is that many of them either stay or return to Dar Es Salaam and take up entrepreneurial pursuits. The next engagement campaign will revolve around a directory of alumni-owned businesses so current families and faculty can continue to support their extended community. This will serve this segment and build lasting, trusting relationships.

Your situation is unique. The alumni persona for your school may not be local. And/or you may need more than one persona. Perhaps you need a USA-based persona that leans toward tech or business administration. How can you serve each persona, build their connection with the school, and pave the way for a long-lasting bonds?

### **Engaging Current Families**

Think about the inquiries you receive that have been referred by other families. Create one or more personas around the types of families who make referrals. Do they belong to a Chamber of Commerce, business, or social group? Are they employed at a large organization that employs multiple families with similar values? How can you provide value to those individuals to retain and increase their level of satisfaction with the education their children are receiving? What stories can you tell about the school that will keep them engaged? How can you remind them that you appreciate their loyalty and commitment to the school?

Word-of-mouth referrals are dependent on forging relationships. Forging relationships with people *en masse*, who you don't know, who live all over the world requires making some generalizations about your audience (personas) and deciding how you can best serve them. Creating beautiful, useful, and generous content to serve your community members is a proven way to achieve your engagement and word-of-mouth referral objectives.

## Using Personas in Marketing and Recruitment



*With Kelly Jo Larson, Senior Director of Communications and Strategic Planning, Concordia International School Shanghai*

Concordia International School Shanghai uses personas in its marketing and recruitment strategy as well as in serving current families. Kelly Jo Larson explains, "When we work with personas, we are building productive generalizations that will help us understand, attract, and serve constituent groups better."

### Four Ways Concordia Uses Personas:

- 1 To build its community with intentionality**  
As part of its recruitment strategy, Larson's team uses personas to filter the types of families the school is looking for to "round out" its population.
- 2 To target messaging**  
Concordia's collateral and admission pieces feature messaging that is often targeted based on personas.
- 3 To inform digital strategy**  
Concordia's Search Engine Optimization (SEO) efforts and other digital work are heavily influenced by the personas the school has determined it wants to target.
- 4 To better understand and serve families**  
Concordia is dedicated to enrolling the whole family. Having clearly defined personas helps the school live up to that commitment. For example, a "Savvy Expat" has completely different

needs from a "First-Time Traveler." Using such personas at the time of a first interaction, an administrator can meet each parent where he or she is, even before learning the actual details of that family's story. Over time, the administrator learns the personal stories and can transition from persona to individual. Building strong family relationships benefits long-term recruitment efforts as well. Since word of mouth is such an important component of Concordia's recruitment strategy, it is critical that current parents are well served.

### Getting Started

Larson offers the following advice for getting started on identifying which personas to create. "First identify who is already in the school. Which type of parent might the school like to attract more of? Or, which type of parent creates more work for the school? Personas might include, for example, a first time expat, a parent of a preschooler (first time school parent), and/or a parent of a particular cultural or language group." She continues, "In any given persona, describe that person's identity (demographics), past and a future (their story), hobbies and preferences, hopes and dreams, fears and anxieties. The more you 'know' about any particular persona, the better you are able to respond to a group of people or an individual who align with that persona."

## Data Protection Laws: Establishing Compliance Standards for International School Admission



*Mark Orchison, Managing Director, gine Consulting*

This report highlights many of the fundamental challenges facing international school admission professionals, from increased student attrition to new sources of competition to lacking professional development budgets. In addition, [changes to data protection laws](#)—initiated in part by the EU’s 2018 General Data Protection Regulations—add yet another new area of concern for admission professionals.

Not only are these data protection laws difficult to interpret, there are also currently no school-specific models of compliance to follow or a framework against which to benchmark progress.

To address these issues, David Willows, director of advancement at International School of Brussels, and I convened a gathering of schools, regional associations, and accreditation bodies on January 7, 2019. Our goal was to define a set of common standards to guide schools on what is required, starting with admissions. Admission professionals from schools across Europe came together to (a) define a set of standards that international schools could follow, (b) using a design-thinking approach, create common templates and tools so that schools aren’t duplicating efforts and resources, and (c) consider how to share these tools and resources with other schools. The outcome is a set of 44 standards set in the context of 18 areas of advancement and a continuum against which a school can audit its own practices. The standards will soon be finalized and shared widely.

In developing the standards, we analyzed the business processes of an admission department

so that we could break down, to an instructional level, tasks and activities for each level of compliance. There are shared and common principles in data protection laws across the world. In some countries the laws are very strict, whilst in others there are no laws. Compliance with data protection law for international schools is less about the location of the school, and more about the location of the people whose data is being processed and the transfer of that data to/from other locations. With this in mind, out of the 44 standards, 14 have been defined as “core,” that is, applicable to all schools no matter their location or resources.

With a continuum ranging from “does not meet,” to “excels and can model for others,” the standards provide schools with an easy-to-use tool to self-audit. Going forward, additional resources and examples will be created that schools can use to achieve higher levels for each standard.

Based on conversations to date, it is likely that some accreditation bodies may develop their accreditation standards to incorporate obligations for data protection and cyber security. By engaging these accrediting bodies in the development of the initial standards, we are hopeful that any school following the continuum will be better prepared to demonstrate these future data protection accreditation standards.

The ongoing development and management of the standards is as important as their initial creation. In collaboration with regional international school associations, we will be setting out a framework and governance structure so they can continue to develop and remain relevant to the needs of international schools.

For more information on the standards, email [mark.orchison@9ine.uk.com](mailto:mark.orchison@9ine.uk.com) or [willowsd@isb.be](mailto:willowsd@isb.be).

# THE APPLICATION PROCESS

Schools are somewhat consistent in the application process but less so in assessment. Most are offering applications online and more than half are open to common applications.

## Application Deadlines and Components

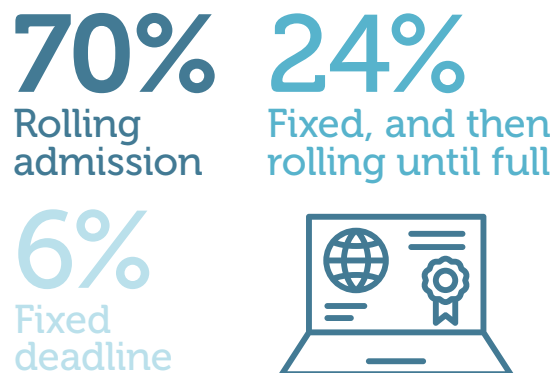
Unlike North American schools, which largely use fixed admission deadlines, the vast majority of international schools use rolling admission, at least in part. Rolling admission can offer schools flexibility to meet enrollment goals. In some ways, however, it can be more complex in that admission offices must capture month-over-month funnel metrics and more nuanced forecasting data.

A significant majority of international schools (70%) offer an online application form. In 2016, this figure was 51%. MacKenzie Hovermale, OpenApply director, recalls that a survey of international schools in 2011-12 revealed that more than three-quarters at that time were using a paper process. She does caution, though, that the degree to which schools' processes are fully "online" varies—at some schools, for example, a link to an online application might lead to a PDF and still involve manual entry. Still, there is clearly an increase in the adoption of online applications.

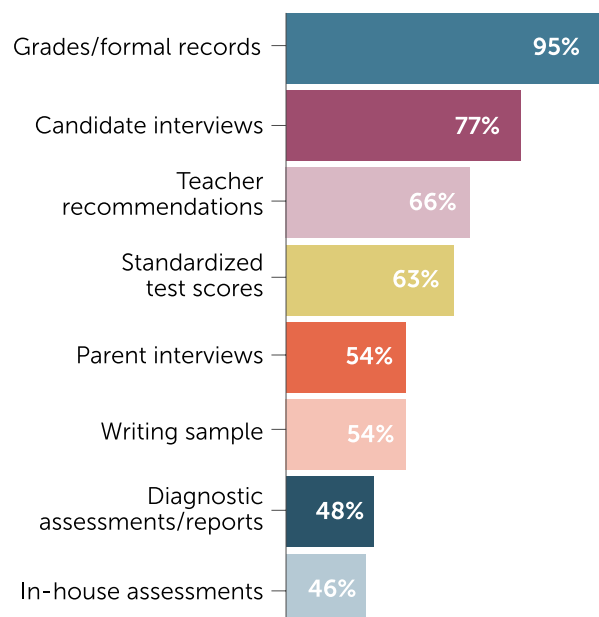
The application components that admission offices rely upon to assess candidates are relatively consistent across school size and region. Responses in this area are similar to those in the 2016 report, with only a few shifts; for example, the use of self-created in-house assessments fell from 54% to 46%, suggesting perhaps a move to more standardization. The use of teacher recommendations fell from 71% to 66%—this change may be attributable to the

increase in the percentage of local applicants; they are likely enrolled in local schools where teachers may not be able to complete an English-language recommendation form.

### Deadline Type



### Application Components





## Fees, Deposits, and Databases

Application fees are the norm; they are in place at 78% of international schools.

About three-quarters of international schools (73%) require a deposit when the offer of enrollment is accepted. This has increased from 65% in 2016. At half of the schools that do require a deposit, this fee represents 0-10% of annual tuition. Admission leaders may want to reconsider this deposit. Such a low financial commitment may not inhibit families from enrolling elsewhere, and therefore may do little to help forecast enrollment.

International schools use a wide range of database and enrollment management systems, with none having a dominant share. The most commonly used are OpenApply (19%), ManageBac (13%), ISAMS (12%), Powerschool (12%), in-house systems (11%), and Veracross (8%). ManageBac and ISAMS show an increased use compared to the 2016 report; OpenApply was not offered as a choice in that previous survey.



## Assessing Applicants

The greatest challenges respondents face in evaluating prospective students are assessing special education needs (ranked as an extremely large or significant challenge by 31%), determining the level of English language proficiency (26%), assessing behavior/character (24%), and differentiating the relative strength of the current school's academic program (22%).

Not surprisingly, a large majority of schools (80%) require an English proficiency test. How they measure that proficiency varies, however. Four-in-ten (39%) use an English test they developed in-house. The WIDA test and MAP are the next most

widely used, as indicated by 30% of respondents (up from 21% in 2016) and 22%, respectively.



## Admission Committees

Two-thirds of international schools (65%) use an admission committee to evaluate candidates. This is a greater percentage than in 2016 (57%). This is an area of significant difference compared to North American independent schools, where admission committees are very widely used.

Only about half of the survey respondents (53%) chair their schools' admission committees. Personnel on the admission committee most often include administrators (93%, up significantly from 71% in 2016), admission staff (76%), learning specialists (54%, up from 47% in 2016), school counselors (50%), ESL/EAL teachers (39%), and faculty (31%).



## The Final Decision

About a quarter of survey respondents (26%) have final responsibility for admission decisions. Others who have final authority on admission are most typically the head of school/superintendent/principal (58%) and the division principals (28%).

Since admission leaders play such a critical role in the recruitment of students and have deep relationships with applicants and families, their voice should be seen as crucial in the decision about student fit within a school's mission and culture.

However a school is set up to assess applicants, it's advisable for schools to find efficiencies to prevent bottlenecks in what are increasingly busy admission offices. For some admission directors, waiting for final decisions from senior administrators can cause slowdowns and put

them at a competitive disadvantage. Some schools handle this situation by designating “decision days” each week or putting in place other workflow systems.

The article [“Working Smarter” in OpenApply’s March 2017 International School Admission Bulletin](#) tells the story of Shanghai American School, where TK Ostrom (who served on the survey committee for this report) worked at the time. Facing a rapid increase in admission demand and an expansion to a second campus across a busy city, the school took intentional efforts to standardize all their admission processes and communications. These efforts not only helped with efficiency in application management, they also resulted in a more consistent experience for families. The article states, “Standardizing daily operations and tasks for all admission personnel across the two campuses resulted in a streamlined, clear, and consistent admission process and improved services to families.”



## Smoothing the Applicant Experience

The 2017 EMA report  
*The Ride to Independent*

*Schools*, a survey of 2,700 prospective families, revealed the importance of easing the application process:

- Understanding the application process was an initial concern of 16% of all respondents and of nearly a quarter of “first-generation” families.
- About one-in-10 respondents said they dropped schools from consideration due to the amount of time involved in applying.
- Almost half of respondents found the application process to have been more work than they expected.

At international schools, addressing application complexity may even be more crucial. Many prospective families are not only applying to schools but also navigating new homes, new jobs, and new cultures.

Take a fresh look at your application process from start to finish, viewing it from the perspective of families. Is timing ideal for them? Are all your required forms truly necessary? Can you make the process and communications more consistent from division to division, so as to ease the burden for families with multiple children?

## Common Application

More than half of respondents (57%) say they are willing to consider offering a common application, that is, an application that families can use to apply to multiple schools. (Those from smaller schools are less willing.)

Given the significant adoption of online application forms and the consistency of application components, it's not surprising that many admission leaders are open to the idea. Schools in North America are increasingly offering common applications such as EMA's Standard Application Online (SAO) to usher in a more family-friendly, less time-consuming application process. EMA is launching a collaborative process to determine interest in a common application for international schools.

### Are International Schools Ready for a Common Application?



*Based on the blog post, "A common application on the school admission horizon" by David Willows, Director of Advancement at International School of Brussels*

"When records began and all we had was paper, we all worked in silos, crafting our application forms. Then online systems came along and we worked with third-party providers to transcribe these beautiful forms onto digital platforms. Five to ten years later, I believe we are now entering the third age of school admission—an age that puts the family first, is efficient, and gives up on the idea that unique is always better than common."

Five Takeaways from Survey & Discussions with Colleagues:

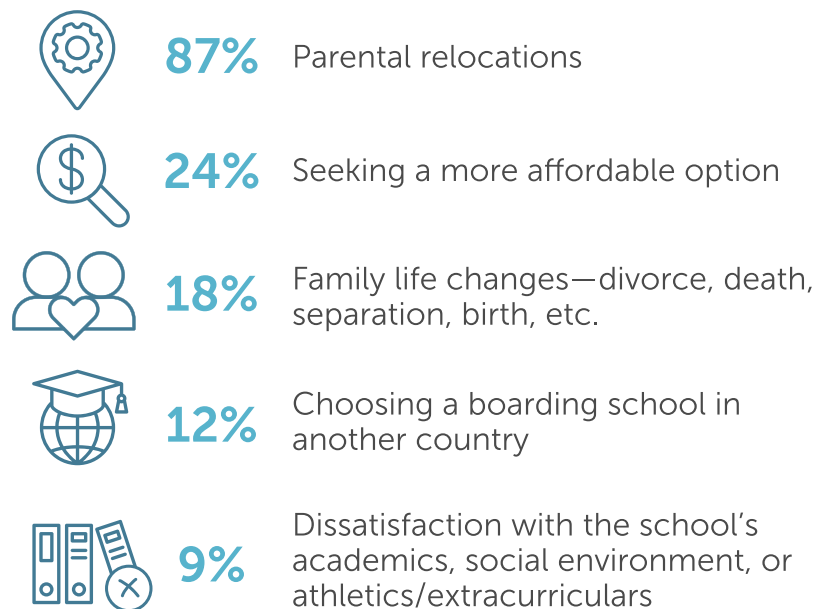
- 1 "A common application doesn't need to replace your existing online application provider, but work seamlessly with it."
- 2 "A common application doesn't need to cost very much."
- 3 "A common application doesn't mean you can't ask questions that are particular to your school."
- 4 "A common application system will need to comply with the new European Data Protection Regulation."
- 5 "A common application allows us, as a community of schools, to collect and analyze important market trends in different regions."

Read the full blog post at [fragments2.com](https://fragments2.com).

# RETENTION

The survey results reveal a growing need for international schools to focus on retention, the “flip side” of the enrollment coin.

## Reasons for Student Attrition





## Attrition on the Rise

About half of the survey respondents (52%) have seen some increase in voluntary student attrition. Of that, 16% described the increase as great or significant.

The cited reason of “seeking a more affordable option” is likely tied to changes in company/third party policies for paying tuition. As reported in the Enrollment Management section of this report, half of respondents (51%) say that companies are now less willing to pay 100% of tuition for employees’ families. Without their educational costs covered fully, more families must consider price and value as they make choices about their children’s education.

## A Focus on Retention

Given the expanding number of school options—and the effort and expense it takes to recruit *new* students—it is more important than ever for admission offices to pay attention to retention.

Currently few international schools (14%) have formal retention committees. (Larger schools are more likely to have them.) At the schools that do have retention committees, they are not typically led by the admission professionals (13%); rather they are most generally led by heads of schools/superintendents (45%) or principals (33%).

In addition to having formal retention committees, many forward-thinking schools are beginning to employ more intentional retention efforts. These include, for example,

- Evaluating and improving a family’s experience at every point in the educational journey.
- Strengthening “whole-school admission” efforts. In particular, building “buy-in” for admission and retention from the faculty is critical. In international schools, teachers not only play an essential role in school tours and visits; they must also be prepared to onboard new students continuously throughout the year (for example, when a family moves to a new school as a result of a company relocation). In addition, parent-teacher conferences are a key retention opportunity; they provide an early-in-the-year, tangible demonstration to families that a school knows and supports their child.
- Tracking attrition. Patterns can reveal otherwise-unknown areas of concern in certain grade levels or with certain types of families. It can also help with enrollment forecasting. For example, every school (even colleges and universities) experiences some degree of “summer melt,” that is, when students make a decision in the summer not to enroll. Tracking your school’s summer melt timing and percentages can help prevent “surprises.”

At a time when more international school families are making choices about value and return on investment, steps like these can make the difference in retaining families.

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About half of the survey respondents (52%) have seen some increase in voluntary student attrition. Of that, 16% described the increase as great or significant.

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## Retention in International Schools: Understanding What Drives Parent Dissatisfaction

Marc Frankel, Ph. D., Senior Consultant and  
Partner, Triangle Associates



One lever that moves enrollment in schools is retention—year-over-year re-enrollment by current students. Some percentage of “leavers” are almost considered a default in international

schools that serve substantial expat populations. Historically, student attrition has run as high as 30-40%, and the prevailing attitude among school leaders has been one of acceptance; that is, high attrition/low retention is just baked into the nature of the business.

However, the landscape of international school enrollment is changing, with an inexorable trend toward fewer American, British, or Canadian expats and more of every other kind of student, including those from the host country. International schools from Quito to Kyoto are also seeing more long term expats who will be in-country for a decade or more. These facts bring retention front and center as something school leaders must address as they seek to maintain or build enrollment.

Parents are highly attuned to what they perceive as the “value” of their children’s education, even when their companies are footing the bill. Adding to that parent vigilance is the fact that many global companies have changed their policies related to employees’ educational expenses—as reinforced by the data in this EMA report. Many companies now “gross-up” (in other words, increase the gross amount of an employee’s

salary to account for deductions, such as taxes or educational allowances) or offer a “cafeteria” style of allowance for housing, car, travel, and school. Our data at Triangle Associates show that when parents themselves write the check for school fees, even if their employer includes money for school in the gross-up amount, it feels as if the fees are coming from their own pocket. This psychology means international schools have more “self-pay” parents than it may seem.

The secret to retention lies in customer satisfaction, revealed in metrics such as Net Promoter Scores and ratings of general happiness with the school. Triangle Associates routinely conducts focus groups with parents of current students on behalf of clients. After meeting thousands of such parents in recent years, we can identify five themes that loosen parents’ connection and result in families leaving their current schools in search of greener grass.

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### Vertical and horizontal misalignment.

Less satisfied parents often talk about year-to-year or (especially) division-to-division inconsistency in grading, discipline practices, homework policies, and level of coursework (vertical misalignment). Few things cause as much agita as the perception that your child’s 6th grade math class is redoing fifth-grade work because the teachers fail to coordinate the flow from one year to the next.

Equally problematic is a lack of alignment between teachers within the same year (and especially within the same department). This “horizontal misalignment” comes to the fore, for example, when parents discover that their 8th grader in Mr. Smith’s science course is doing less advanced or interesting work than a friend’s 8th grader in Ms. Jones’ class. Even students complain about this when given the chance.

**2 Communication failure.** Few parents (or teachers) would say that their school leaders are paragons of communication, but what we hear that stands out among unhappy parents are failures to communicate in real time around significant issues that affect their children. Most grating is inconsistency in teacher responsiveness to parents (returning phone calls and emails, advising parents of problems, etc.). School leaders would do themselves and their schools a huge favor if they established and enforced minimum and uniform expectations about responsiveness.

**3 Unclear value on offer.** The most damning statement we hear is that “this is the best public school money can buy.” We hear this most often from self-paying parents along with those who feel like they are paying out-of-pocket.

The value proposition in international education has and is shifting away from being mere facsimiles of parents’ public schools back home in the U.K., America, or Canada. As competition increases, the ante rises for making the value of your school clear; what, exactly, are parents getting for their tuition dollars, euros, or pesos? Back your statements up with evidence and do it again and again. The international schools that endure will be those that fulfill a larger purpose, including being of value to the host country itself.

**4 Retaining weak teachers.** We realize that IB science teachers are hard to find, let alone those willing to work in a difficult and challenging location, but parents despise being told that a teacher is good enough when it is obvious to everyone that she is substandard. We understand the nature of labor laws around the world, but schools really do need to find work-

arounds in the short term and ways to move people out in the long term.

Someone in nearly every parent focus group we have conducted names the teacher they think is the worst in the school, usually with broad agreement from the other parents. Not coincidentally, we sometimes hear the faculty themselves complain about inconsistent teacher quality while naming the same teacher. If an issue of teacher quality is that widely known, school leaders are wise to take action, especially given that most schools’ value propositions include teacher quality.

**5 Initiatives without sufficient support.** Few things irritate parents more than schools that start major teaching and learning initiatives (think one-to-one or Schrole or iPad books) without the professional development support for faculty to incorporate the new technology into their teaching. Every faculty has early adopters and laggards like any other group, and a snazzy new program of any sort (technology or not) is only as strong as its least supportive teacher. Schools leaders should build in the time and budget to train all teachers on new technology, and consider the lasting and negative effect of not doing so not only on teacher morale but on student retention.

Hanging onto the students already at the school is becoming tougher as competition rises in the international sector. Simply being the American or British school is no longer enough. The best way to work the enrollment retention lever is to reduce issues—like those demonstrated above—that cause parents to question their attachment to the school.

# ENROLLMENT MANAGEMENT

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The survey responses reflect changes in the competitive landscape, the applicant pool, and how tuition is paid.

## Competition and the Growing International School Market

To meet growing worldwide demand, the number of international schools has grown rapidly. According to ISC Research market data, in the nearly two decades since 2000, the number of English-speaking K-12 International schools has grown from about 2,500 to more than 10,000. The number of students enrolled has grown five-fold.

Richard Gaskell of ISC Research explains the sectors of growth behind these overall numbers: “There has been significant growth in the number of bilingual international schools (where English is one of the languages of learning) and in international schools following a British curriculum. There remains steady growth in international schools following the International Baccalaureate and a US style of curriculum.”

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“As the demand for international education continues to grow in both the public and private sectors in all countries, the expatriate school sector is no longer growing, rather individual proprietors and companies are now investing in international education as a business, to meet the demand to serve local families in their communities.”

—Jane Larsson, Executive Director, Council of International Schools (CIS)

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Given the size and scope of this growth, it’s not surprising that survey participants ranked “competition from other international schools” as their number one challenge. Relatedly, among the other top challenges are marketing and pressure to meet enrollment goals.



## Top Enrollment Challenges

Competition from other international schools in the area	39%	Enrolling a diverse student body	24%
Family reluctance to disclose children's learning needs	27%	Dealing with economic decline in the area	24%
Marketing the school effectively	26%	Limits on the number of students with learning style differences	22%
Pressure from boards/heads to meet enrollment numbers	24%	Limits on the number of ESOL students	20%



## Market Growth: Data from ISC Research

	2000	January 2019
Number of English-speaking K-12 international schools	2,584	10,282
Students enrolled in international schools	Just less than 1 million	5.36 million
Full time staff employed by international schools	90,000	503,000
Total income from annual school fees (the school fees vary significantly from one school to another depending on type of school and location)	USD \$4.9 billion	USD 49.9 billion

## Growth of Schools in China

School growth has been particularly high in China, and is projected to continue. From 2001 to 2017, China went from hosting 2% of the population of globally mobile students to 10%.

### Four Types of Schools in China:

- 1 Schools for Children of Foreign Nationals (Expat Schools).** Status: Shrinking population of expatriate means less demand.
- 2 Private Schools.** Designed for Chinese citizens, these schools offer Chinese

National curriculum and international curriculum.  
Status: Rapidly increasing in numbers.

- 3 Sino-Foreign Co-op.** Partnerships between a Chinese owner and a foreign education company or school, these schools enroll Chinese students and foreign students.  
Status: No new schools opening.

- 4 International Streams.** These privately-operated entities that run within Chinese schools enroll Chinese students and foreign students. Status: Few new departments have opened in the last few years.

## Tuition and Payment of Tuition

Annual tuition at international schools varies widely, largely related to the cost of living in a particular area. Eight-in-ten international schools (80%) charge a range of fees in addition to tuition.

Over half of the surveyed schools (56%) offer financial aid. Overall, about 10% of international school students receive financial aid. More than half of schools (58%) offer some sort of tuition discount (e.g., for siblings, local children, company employees, alumni, or staff).

Families paying at least part of the tuition themselves account for two-thirds (64%) of international school students, although the proportion each family pays varies widely both across and within school size and country.

About a third of families (32%) have at least some portion of the tuition cost paid by a third party. The most common type of third-party payment arrangement is direct payment pay by a company (59%). About one-third (33%) of international schools have experienced changes in policies regarding third-party tuition payments.

About half of respondents (51%) say their experience is that families' employers are now less willing to pay 100% of tuition.

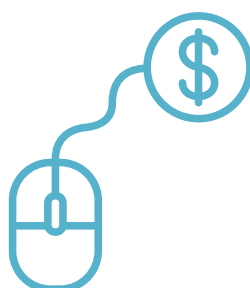
Respondents' verbatim comments describe changes such as employers putting caps on tuition payments, paying only a percentage of tuition (such as 80%), stricter policies about what fees they will cover, allowances instead of direct tuition payments, payments only for older students. Many also say that companies have changed to "local contracts," often without the paid schooling benefit.

As we explore in other sections of this report, if families are no longer given *carte blanche* by their employers for education expenses, they will be more focused than in the past on issues of affordability and on ensuring value. Admission leaders should stay abreast of anticipated changes in industries that impact the local economy.

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“The flow of applicants for international schools through the traditional pipelines has slowed as corporations have changed their employee packages or reassigned employees—or office locations—altogether. In parts of the world the sheer proliferation of hundreds of new international schools has had impact, causing international schools to serve and support a broader range of learners, to clarify their missions and value propositions, and to find new ways of getting families to come to the front door as well as to walk through it.”

—Benjamin L. Bolté, Senior Search Consultant and Practice Leader, Carney, Sandoe & Associates

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## The Funnel

Eight-in-ten (85%) respondents in this survey say their schools are tracking funnel statistics over time (e.g., inquiries, applications, acceptances, and enrolled students). This is a slight increase compared to the previous survey (81%).

The admission funnel is changing for all private schools worldwide. This is due in large part to the rise of the “stealth applicant”—that is, the student/family who does research online and self identifies further into the application process, or not at all (that is, who does not apply). Despite the changes in the funnel, tracking is still very important. It is up to schools to re-envision their funnel and track data points that are relevant to their own markers of success. These may include campus visits, web visits, and so forth. Many schools also track multiple funnels—for example, funnels specific to academic division (e.g., elementary) or to type of prospective family (e.g., expat). This effort can help more specifically identify challenges and areas of growth.

# Selectivity and Competitiveness

## Current Year Demand

More applications than available spots/ extensive waiting list	11%
More applications than available spots / small waiting list	30%
Accepted all qualified students / reached enrollment goals by start of year	19%
Still enrolling students after start of the school year	23%
Unlikely to meet enrollment goals	15%
Do not know	2%

Only about 60% of international schools report that they met all their enrollment goals for the previous year (2017-18). Another 28% said they met goals in some divisions but not others.

When asked to characterize demand for the current year (2018-19), 60% said that they met enrollment goals on time. About a quarter of respondents at the time of the survey (September-December 2018) were still enrolling students, and 15% said they were unlikely to meet enrollment goals.

Although the wording of the questions is slightly different from the language used in the 2016 survey, there appears to be a slight worsening in these measures. Seemingly at odds with this, more than half of the respondents consider the enrollment outlook to be improved over last year (53%). Larger schools tend to have the most favorable outlook.

More schools find it challenging to meet enrollment goals for high school/upper school (56%) than for lower grades. Three-quarters of schools (76%) use some sort of priority system for admission (e.g., preference for siblings, passport, employer).

Only about 60% of international schools report that they met all their enrollment goals for the previous year (2017-18).

## Enrollment Restrictions

Adding to the complexity of their work, some international school admission officers must adhere to enrollment restrictions imposed by local governments. Eleven percent have restrictions on the percentage of host country nationals they can enroll. Another 8% indicate other restrictions related to host country nationals. For 4% of respondents, no host country students are allowed to enroll. About two thirds (65%) have no enrollment restrictions.

In some cases, changes in restrictions can create major changes in a region's market. For example, in September 2018, Decree 86 went into effect in Vietnam. The new regulation allows international schools to have enrollments that include up to 50% of local Vietnamese students. (Previously, the cap was 10% of primary education



enrollment and 20% of secondary.) This new decree paves the way for a boom in international schools in Vietnam.

A relatively small proportion of international schools (22%) have an enrollment cap for students from particular countries or language groups. Such quotas are designed to limit nationality/language group dominance—thereby creating diversity and advancing schools' missions. Admission officers who have to work with these quotas must balance those parameters while still driving demand for the school.

When asked whether they are required to offer host country curriculum or adhere to other host country requirements such as language or religion, about half of the survey respondents (51%) said yes.

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"When international schools served predominantly expat students, many governments only took a passive interest in them. Countries all over the world understandably care deeply about the education of their children, so they are likely to increase their regulatory oversight and tighten their restrictions on international schools as international schools educate more local children and compete directly with local private and public school options."

—Liz Duffy, President, International Schools Services

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## Students with Learning Differences

It's interesting to note that about a quarter of respondents indicate as overall admission challenges both "family reluctance to disclose children's learning needs" and "limits on the number of students with learning style differences who can be enrolled." In addition, in another section of the survey, a third of participants say that assessing special education needs is an extremely large or significant assessment challenge. A third of respondents say that admission is more competitive for students with special education needs (31%—a significant increase compared to the 22% in 2016).



Taken together, these data suggest that assessing and supporting students with learning differences is an area of growing concern. Admission professionals could benefit from more clarity around the numbers of students that schools and teachers have the bandwidth to support.

A joint report by ISC Research and Next Frontier: Inclusion, entitled *Inclusion in International Schools Global Survey*, addresses this shift. In an article based on the survey in *International School Leader* magazine called "Moving Toward Inclusion," Ochan Kusama-Powell explains, "As the reputation and access to international schools increases, so more parents see them as the solution to their children's

learning needs.” The study found a significant year-over-year increase in the percentage of schools that had admitted students with various learning differences. It also found more schools filling learning support positions.

## A Shifting Student Body

A large majority of respondents (74%) feel their schools’ applicant pools have changed over the last five years. Four-in-10 respondents note more interest from host country families as one factor affecting enrollment.

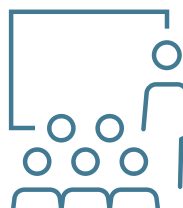
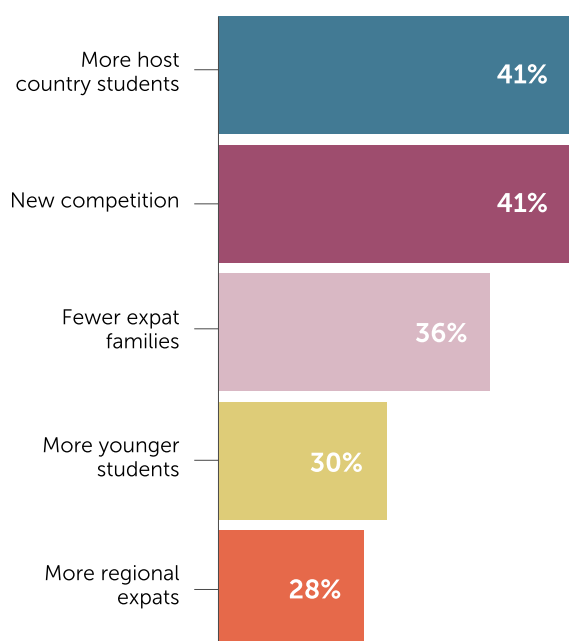
Market data from ISC Research also show a shifting makeup of students at international schools. ISC Research’s Richard Gaskell reports, “Approximately 80% of all students attending international schools today are local nationals. Approximately 20% are expatriates, although the demographic is changing from one that is dominated by Western expatriates, to one that includes many more Asian expatriates too.” These

changes are attributable to growing wealth in many countries and a belief that international schools are a reliable pathway to higher education.

The changes in the applicant pool mean the role of the admission director’s work changes as well. Kelly Jo Larson of Concordia International School Shanghai, describes one aspect of this change: “Our marketing strategies have shifted from attracting families or providing affirmation of purchase stories and ads, to cultural education and expectation setting with parents who don’t have the same understanding of what it means to be part of an American school community.”

Two-thirds (63%) of international schools feel competitiveness varies among groups of applicants. This is an increase from 59% in the last survey. The types of applicants who experience greater competition include host country students (42%), those with special education needs (31%), and ESOL applicants (26%).

### Factors Affecting Enrollment



# HOW TO USE THESE FINDINGS

- 1 Share this report with your leadership team.** Invite a discussion about the changing role of admission and the ways you can continue to develop your skills and knowledge.
- 2 Brainstorm ways you can stay up to speed on industry trends and changes in your local area.** Who has access to the best information on the flow of expatriate families in/out of your city? On multinational companies and/or other industries? On new schools/competitors moving in?
- 3 Consider the staffing-related data and discussion in this report.** What new or different skills might be needed in your admission office? Database management? Marketing skills, including social/digital marketing? Are you considering cultural competency skills? If you have very new staff members, what are you doing to orient them and give them big-picture context?
- 4 Consider turnover on your admission team and the advancement/communications/marketing teams.** Considering the loss of institutional history and internal and external relationships built when a staff member leaves, what systems can you put in place to retain staff, and what policies can you document to help ensure limited impact on enrollment during a transition?
- 5 Take a fresh look at your marketing strategies in light of the data in this report.** Is your value proposition clear and consistent across all materials? What's your ROI on your marketing and outreach activities? Rank order these activities — does anything stand out? Can you formalize and maximize all-important word of mouth referrals?
- 6 Work with your team to analyze your website: Does it truly reflect your school culture?** Can families easily find what they need? View it from numerous perspectives, e.g., a first-time international school family, a local family, and an experienced global family.
- 7 Review your application process, from start to finish.** Is it clear at every stage? Are your practices—such as fees and deadlines—creating any unnecessary obstacles? While it's been common practice for schools to ask for documents such as medical forms during the admission process, consider minimizing requirements to only those things that are necessary to make an admission decision.
- 8 Brainstorm ways to make your application evaluation process even more efficient.** If files are read by others outside your office (e.g., counselors/principals), are they able to access them electronically? Can you agree upon a schedule by which you will have decisions to enable you to communicate with families?
- 9 Consider your student attrition rates.** Have they increased in the last decade? Can you identify patterns by student types? Who can create this report and present it to the leadership team?
- 10 Reach out to other admission professionals in your region.** Are there opportunities for collaboration and shared learning?

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"In increasingly crowded and competitive international school environments, particularly those with shrinking subsidized expat populations, the role of a school's admission office is critical to the health of a school. Seasoned admission professionals serve as essential liaisons between schools and their communities. On the one hand, admission staff help schools meet their enrollment targets and attract families aligned with their values, educational philosophies and programs. On the other hand, they provide important insights for schools into the needs and desires of prospective students and families."

—Liz Duffy, President, International Schools Services (ISS)

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"Increased competition, global market changes, and a changing student demographic, all highlighted in this report illustrate the need for modern enrollment managers to be trained and treated as senior level administrators. The continued success of schools depends on strong enrollment professionals."

—Nicholas Kent, Associate Head of School, Western Reserve Academy (2019)

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"As international enrollment leaders, in the past, we often found ourselves without any type of substantial data/research about our profession and other schools' enrollment landscapes globally. Now, in this report we have access to relevant information that supports our ever-changing environments and elevates us professionally within our schools to promote positive sustainable outcomes."

—TK Ostrom, Director of Enrollment Management and Marketing, United Nations International School Hanoi (2019)

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#### ABOUT EMA

The Enrollment Management Association provides unparalleled leadership and service in meeting the admission assessment and enrollment needs of schools, students, and families. EMA's flagship services for independent and private schools include the SSAT, the gold-standard in independent school admission testing for grades 3-11; the Standard Application Online, a common application for grades PK-PG; and The Character Skills Snapshot, a tool that measures an applicant's character skills. For more information, visit [www.enrollment.org](http://www.enrollment.org).

#### ABOUT ISC Research

Since 1994, ISC Research has been collecting market intelligence and data on international schools throughout the world. Its reports, data, and expertise guide schools with their growth plans, inform investors for new school development, support universities when engaging with K-12 English-medium international schools, and advise educators supporting the market.

## COUNTRIES REPRESENTED IN REPORT



United Arab Emirates



China



Malaysia



India



Brazil



Germany



Mexico



Netherlands



Singapore



Thailand



France



Japan



Cambodia



Qatar



Vietnam



Colombia



Indonesia



South Korea



Nigeria



Saudi Arabia



Switzerland



Egypt



Italy



Kuwait



Panama



Philippines



Romania



Spain



Taiwan



Bangladesh



Belgium



Czech Republic



Ecuador



Greece



Guatemala



Hong Kong



Hungary



Oman



United Kingdom



United States of America



Austria



Bermuda



Cameroon



Georgia



Ghana



Kazakhstan



Latvia



Luxembourg



Malawi



Morocco



Myanmar



Pakistan



Poland



South Africa



Sweden



Tunisia



Venezuela



Zimbabwe

The  
Enrollment  
Management  
Association  
+  
Yield Your Best