

PART 2

Market Maintenance

By Moira Kelly and
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Schools are full of hidden liabilities. We all know the risks of neglecting the physical plant and facing the consequences of deferred maintenance. But another kind of liability can build just as quietly and may be even more consequential: market maintenance. It's the ongoing work of understanding who your prospective families are, how they make decisions, and whether your value proposition truly resonates.

This is not a marketing problem. It is a market intelligence problem. Schools that treat market intelligence as infrastructure—the foundation for sound decisions about strategy, budget, and positioning—will be best equipped to respond to what's ahead. And what's ahead is arriving faster than most boards, heads, faculty, and families fully appreciate.

••••• The Shifting Landscape

What's changed in the external environment isn't a single disruption; it's a convergence of pressures reshaping the market for K-12 enrollment. Some of these forces have been building quietly for years; others have accelerated rapidly.

Declining birth rates and population shifts in some states are narrowing the pipeline of students just as school choice programs have gone mainstream, expanding the range of options available to families. At the same time, public policy is changing the flow of resources: As of May 2026, 20 states had approved education savings account (ESA) programs, making roughly 23 million students eligible and placing more than \$5 billion directly in parents' hands to spend on education. That landscape will shift further with the launch of the federal Education Freedom Tax Credit in January 2027, facilitating scholarships in at least 31 states for K-12 education expenses, including independent schools.

Meanwhile, competition is intensifying. Independent schools are no longer the default alternative to public education; a reinvigorated charter sector and the rapid growth and improving quality of microschools, hybrid homeschools, and virtual options are redefining the field.

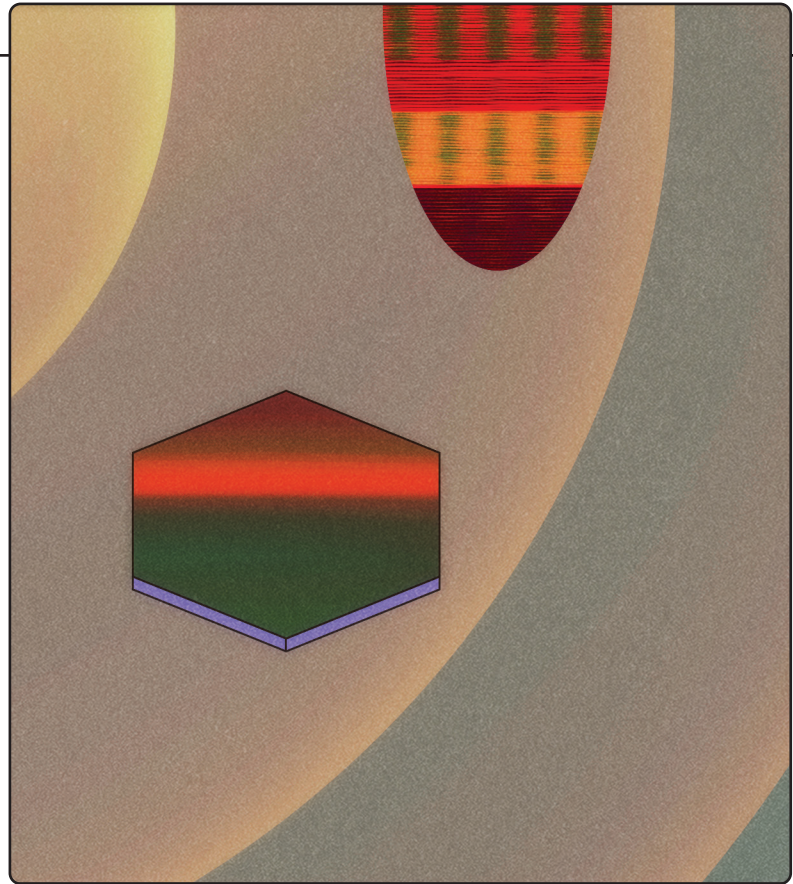
And beyond U.S. borders, international student demand is both shrinking and shifting, driven by geopolitics, visa uncertainty, and rising global competition for students who once gravitated to U.S. independent schools.

Together, these forces are not only reducing the size of the market, they are shaping its contours. These dynamics are unfolding alongside fundamental shifts in how parents search for and engage with schools. Families now conduct extensive research long before ever making contact, reading reviews on platforms like Niche, scrolling through social media, and participating

in Facebook groups. Word of mouth has gone digital and public. The private networks that once quietly drove enrollment now have faster, broader online equivalents that schools can neither monitor nor easily influence.

The results of a national survey published by Tyton Partners in *Choose to Learn* suggest that nearly 50% of parents are open to exploring alternatives to their child's current school, highlighting an important opportunity for independent schools but one complicated by rising parent expectations around safety, student support, and screen use.

The cumulative effect is a market that is simultaneously expanding *and* shrinking, fragmenting, and becoming harder to interpret. Families are finding—or not finding—schools in ways that look fundamentally different than they did even five years ago.



••••• The Peril of Being Anecdote-Rich and Data-Poor

Most schools earnestly try to turn up the lights when refining their strategy. They gather information that feels real: conversations in the carpool line, impressions of who applies and from where, word-of-mouth assessments of competitor schools.

Compounding the challenge is where schools turn for insight in the first place: current parents, students, board members, alumni. But these are the initiated, the people who already know and have chosen the school. Relying primarily on their perspectives creates blind spots precisely where they matter most—among prospective families and those who haven't yet considered the school. It's an "anecdote-rich, data-poor" condition; schools think they know their

market. They think they know their prospective families. In fact, they're still looking for the light switch.

For families, independent school tuition represents one of the largest financial commitments they make, arguably second only to buying a home. They invest considerable time and energy in understanding their options. Too often, schools do not make a commensurate investment to understand them.

The result is a familiar pattern. Enrollment declines are attributed to “the market” when attrition is driven by gaps between what the school promises and what it delivers. Marketing is aimed at the wrong families or geographies. Tuition and financial aid decisions are made without understanding families’ willingness to pay. Program investments—or cuts—proceed without insight into what prospective families truly value.

The risk of an anecdote-rich, data-poor approach isn't inaction; it's false confidence. Decisions feel well-grounded because they are, but just not in the right data. Without disciplined market intelligence, leaders lack a clear view of the forces driving performance gaps and missed targets. Solutions are built on misdiagnosed problems, and the underlying pressures persist.

When Messages Miss the Mark

Who is out there? Where do prospective families live, work, and make decisions? What are they choosing, and why? What do they know about your school, and what don't they know? What would make them consider you? At the core, this is about understanding your serviceable, addressable market: the families for whom your school could plausibly be the right fit *if* they knew about you and *if* your value proposition resonated.

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The more important question is why families who should inquire don't. Answering that requires looking outward at demographic shifts, at competitor positioning, and at how families in your region are making decisions, not just inward at your own inquiry pipeline.

Tools like NAIS's DASL and MarketView can provide a meaningful demographic baseline (household income, ages of children, geographic distribution) and a useful starting point for understanding who is out there. But when schools are already using that data and still find enrollment softer than expected, it's a signal that demographics alone are not enough. Knowing that 4,000 income-qualified families with school-age children live within 10 miles of your campus is valuable. Understanding why so few have ever considered your school—and what it would take to reach and engage them—requires deeper, more disciplined market insight.

School Story:

Leading with the Wrong Story

What you are proud of and what your market is looking for are not always the same. In 2024, a Boston metro area school known as an athletic powerhouse assumed—reasonably, given its record—that athletics was one of its strongest market assets. But a survey, conducted by Tyton Partners for the school, of more than 200 families considering independent schools in the school's catchment area (the region from which it could realistically draw enrollment) told a different story. The survey asked high-income families and moderate- and low-income families to rank their most important criteria when considering independent school high school options. The results revealed that the school wasn't wrong about its athletics; it was wrong about its audience's aspirations. In both income

categories, college preparation, social networks, and academics ranked high. But athletics ranked further down, after academic support, reputation and prestige, and location.

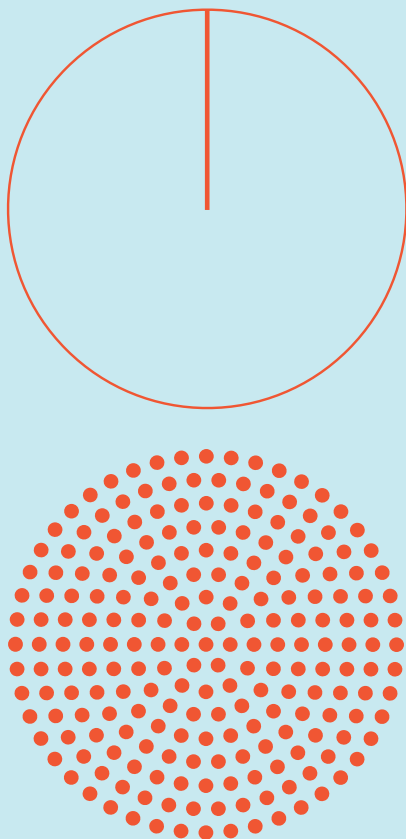
With this new information and an understanding of what families were looking for, the school pivoted and no longer led with the athletics program. It began to highlight its record on college acceptances and matriculation in its communications, especially among higher-income families for whom college outcomes were a primary consideration.

School Story:
Hidden in Plain Sight

A Nashville metro-area school offering four differentiated levels of math worried that this structure might be seen as a market weakness, a signal that it served a wide and perhaps undifferentiated range of students. Market research Tyton conducted for the school revealed the opposite. Families saw it as a strength; they saw it as evidence of a school committed to meeting each student's individual needs. This same framing was employed

by a school in western Massachusetts. Over time, their messaging around four levels of learning was refined, and it became a key selling point that contributed to an increase in both applications and matriculations.

For the school in the Nashville metro area, Tyton conducted a survey of 450 current and prospective parents, asking them what mattered most when they were evaluating academic quality. Both parents of students in Honors+ and College Prep and parents of students who needed academic support ranked



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From first click to reenrollment, families experience your school as one continuous relationship. In **“The Family Sees One School,”** Janice Crampton, executive director and CEO of the Association of Independent School Admission Professionals, makes the case that the real enrollment challenge isn't recruitment—it's alignment.

For families, the areas of admissions, financial aid, marketing, and communications have already converged into a single lived experience. The work of catching up—organizationally and culturally—is one of the greatest enrollment challenges today.

When messaging, experience, and mission don't line up across touchpoints, trust erodes and so does retention. Discover how schools can close the gaps and create a more cohesive, mission-driven family experience.

➤ **Read the full article** at nais.org/independent-school.



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as the highest importance student-to-teacher ratio, multiple levels of learning, and STEM curriculum. The breadth of academic support services was ranked significantly lower. The analysis also surfaced a missed opportunity: a sizable group of families in the area who were concerned about the quality of local high schools and actively seeking independent school options. The school had not previously identified this audience or targeted its outreach. It does now.

In both cases, in addition to addressing the schools’ issue, Tyton’s surveys revealed something subtler but equally important: framing matters. The same fact—four levels of math or four different academic tracks—can suggest either a lack of selectivity or a deep commitment to differentiation. Positioned as a strategy for meeting each student’s unique strengths and challenges, it becomes a compelling asset. The data didn’t change what these schools offered, but it did change how they talked about it.



Market Intelligence Done Well

Market intelligence is not a one-time study or a consultant’s report. It is a competency, a set of habits, tools, and institutional practices that enable

a school to read its environment continuously and make decisions with clarity. It has several core components:

Demographic and competitive data: Census trends, birth rates, migration patterns, competitor enrollment and pricing, and new market entrants—an understanding of the market you’re operating in, including the local public schools that remain the default choice for many families.

Family research, both qualitative and quantitative: Surveys and interviews with current and prospective families and, critically, those who inquired and didn’t enroll as well as those who left. The unconverted and departed are often the most instructive. Increasingly, so are families who aren’t yet aware your school exists; Tyton’s national research suggests that awareness, not affordability, is often the primary barrier to consideration.

Peer benchmarking: How your school compares on tuition, discount rate, yield, and retention against true peers (schools that are actually similar to yours), rather than aspirational ones (schools that you would like your school to be comparable to).

Internal data discipline: Enrollment funnels, attrition by grade and family profile, and financial aid patterns tracked with rigor and

regularity, not as a snapshot but as a continuous read.

Macro market dynamics: Policy shifts like ESAs and the potential federal tax credits, changes in charter school caps, and the growth of microschools and virtual programs are all reshaping what was once a relatively stable, “known” competitive landscape.

Community feedback loops: Formal and informal mechanisms for hearing from current families before dissatisfaction becomes departure.

Done well, market intelligence functions as an organizational dashboard, visible to both the leadership and the board. When it lives only in the admissions office, its insights don’t travel far enough. It should inform strategy, program investment, financial planning, and enrollment and admissions. That requires not only intentional structures for sharing information across leadership but also a culture willing to engage with, and act on, what the data make clear.



The Leadership Imperative

In a difficult enrollment moment, the instinct is often to manage year to year: to close this year’s gap, adjust this year’s financial aid budget, and defer the harder structural questions. That path leads to slow, often invisible decline.

The institutions that will thrive in 20 years are the ones whose leaders begin asking those harder questions now.

Boards and school leaders can engage meaningfully with market intelligence only when they establish ownership and invest in the work. That means treating it as a strategic imperative—allocating time, resources, and, where appropriate, external expertise to support the director of enrollment management, the chief financial officer, or another senior leader charged with advancing it.

In practice, effective board and leadership engagement looks like this:

Boards receive and interrogate real market data: demographic trends, competitive landscape, family research insights, not just enrollment totals and net tuition revenue.

Boards understand how families beyond the current community perceive the school and are willing to confront where its positioning resonates—and where it falls short—and what it will take to strengthen it.

Tuition and financial aid strategies are grounded in rigorous data on families' willingness to pay across income levels, including need-based and merit aid, fee subsidies, and, where applicable, ESA funding and tax-credit vouchers.

Enrollment health is treated as a leading indicator of institutional health, not a lagging one, and enrollment assumptions are understood as a Enrollment and Admissions responsibility, not an administrative detail.

Heads champion and execute evidence-based, external analyses to inform strategic planning, budgeting, and program decisions, and they build the systems needed to refresh these perspectives over time.

Schools that fail to build this competency often experience a familiar pattern: declining enrollment, unsustainable discounting, enrollment of



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students who are not a strong fit, missed opportunities in emerging markets, and, eventually, cuts to programs, staffing, or facilities to balance the budget—often some combination of all of the above. Over time, they fall behind on the infrastructure and reinvestment that sustained excellence requires.

The Market Is Waiting

Independent schools do remarkable work. The families who choose them are seeking authentic, transformative experiences; they seek depth of community, intentional education, mission-driven culture. Building the capacity to understand your market is not a retreat from that mission; it is the precondition for living it well. The schools that will carry this sector forward will combine deep internal conviction with rigorous, outward-facing intelligence. They will know who they serve, who they could serve, and what it takes to earn and sustain that trust. They will attend to every dimension of the institution, not only the physical campus but the people and purpose that define it.

And they will invest accordingly—proactively, strategically, and with a clear understanding that excellence, like enrollment, is built over time. ●

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