



Confidence Index 2024

Annual survey
of marketing,
admissions and
development in
UK independent
schools



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About MTM Consulting

MTM are experts in independent school marketing. Over five decades, we've worked with hundreds of education providers and researched thousands of industry professionals and parents, providing valuable data insights and detailed market research and analysis to help leadership teams make decisions to market their schools effectively.

We offer unique data-driven insights that allow schools to fully understand their current and future markets, and to take evidence-based decisions to inform their business strategy.

The fundamental challenges facing organisations within the education sector remain the same, despite the ever-changing political and economic landscapes: understanding their markets and how these will change in the future, and demonstrating the ability to develop and adapt the business strategy to survive and succeed. The political and economic factors make these requirements more important now than ever before.

With MTM Consulting's support, schools and organisations have the best chance to thrive and to deliver the educational service their market needs

Our high-quality services include:

- Catchment analysis
- Non-joiners surveys
- Parent surveys
- Mystery Shopping
- Staff satisfaction surveys
- Wider market research
- Feasibility studies
- Fee elasticity analysis
- Mergers and acquisitions
- Alumni engagement

For more information please call 01502 722787 or email office@mtmconsulting.co.uk



Foreword MTM Consulting

Once again, MTM Consulting has teamed up with AMCIS to repeat our ground breaking research into staff morale in the independent school sector, and we are looking forward to launching the findings at their annual conference.

We are delighted to have also worked with IDPE this year to expand the Development section.

I'm pleased to say that this year we had even more response than in 2023. This represents over 15% of independent schools taking part in the survey.

This year we have concentrated our questions on Marketing, Admissions, Communications, Development and Alumni roles and how confident staff are in their ability to carry out their roles effectively, and in the future of the sector. Live throughout April 2024, topics within the survey included:

- Ability to keep ahead of the latest developments in the sector
- Ability to recruit effectively into key roles
- Confidence in the support from key colleagues
- Levels of stress felt
- How valued they felt in their roles
- What the future holds for the independent sector.

We will now be working with our sector colleagues and the team at AMCIS to ensure that issues highlighted by this survey are raised with school leadership teams.

I hope that you find it a reflective and worthwhile read that provides real food for thought about the future of our sector.

James Leggett
Managing Director
MTM Consulting



About AMCIS

AMCIS is the Association for Admissions, Marketing and Communications in Independent Schools.

It's our mission to help independent schools thrive by advancing professional expertise in admissions, marketing and communications in a friendly, supportive membership community. We've been serving the independent school sector for over 25 years and have over 500 member schools across the United Kingdom.

Many people know us through our highly popular vacancies service, which enables independent schools to recruit from a wide pool of talented individuals.

Membership offers many benefits, not least support and advice, discounted rates at our many training and professional development events, and the opportunity to study for our own diploma qualifications, the highly specialised AMCIS diplomas in Schools' Marketing and School Admissions Management. Our members tell us they value the professional contacts, new ideas, and sense of reassurance they gain from the networking we facilitate.

We believe in a friendly, supportive approach to combat professional isolation and ensure that everyone, whatever their starting point, feels they can learn with us. Time and again, our members say that AMCIS membership means they no longer feel alone.

Visit us at www.amcis.co.uk



Foreword AMCIS

Supporting the efforts of school admissions, marketing, and communications teams constitutes the core mission of AMCIS, a task we undertake tirelessly day after day. Through regular engagement with both our members and a considerable number of non-members, we gain valuable insights into the landscape of independent schools and how they are faring.

It's intriguing to amalgamate this anecdotal knowledge with the insights gleaned from The Confidence Index, forming a comprehensive understanding of the sector's health and the individuals responsible for its marketing and admissions, regardless of their diverse roles and titles. We're thrilled to continue collaborating with MTM to broaden the reach of this survey, culminating in the unveiling of the latest findings at the AMCIS 2024 Annual Conference.

This year, it is no surprise to see affordability at the top of schools' concerns, closely followed by wellbeing. However, it is disconcerting to read that a third of respondents consider their schools' commitment to EDI not to be as rigorous as professed. Economically and otherwise, this is completely illogical; robust EDI practice has immense potential to positively impact recruitment and wellbeing.

As the sector faces numerous strategic challenges ahead, the support for those steering school admissions and safeguarding reputations becomes imperative. AMCIS eagerly anticipates continuing to provide those in admissions, marketing and communications roles with essential training, avenues for professional growth, and platforms for the exchange of ideas and best practice.

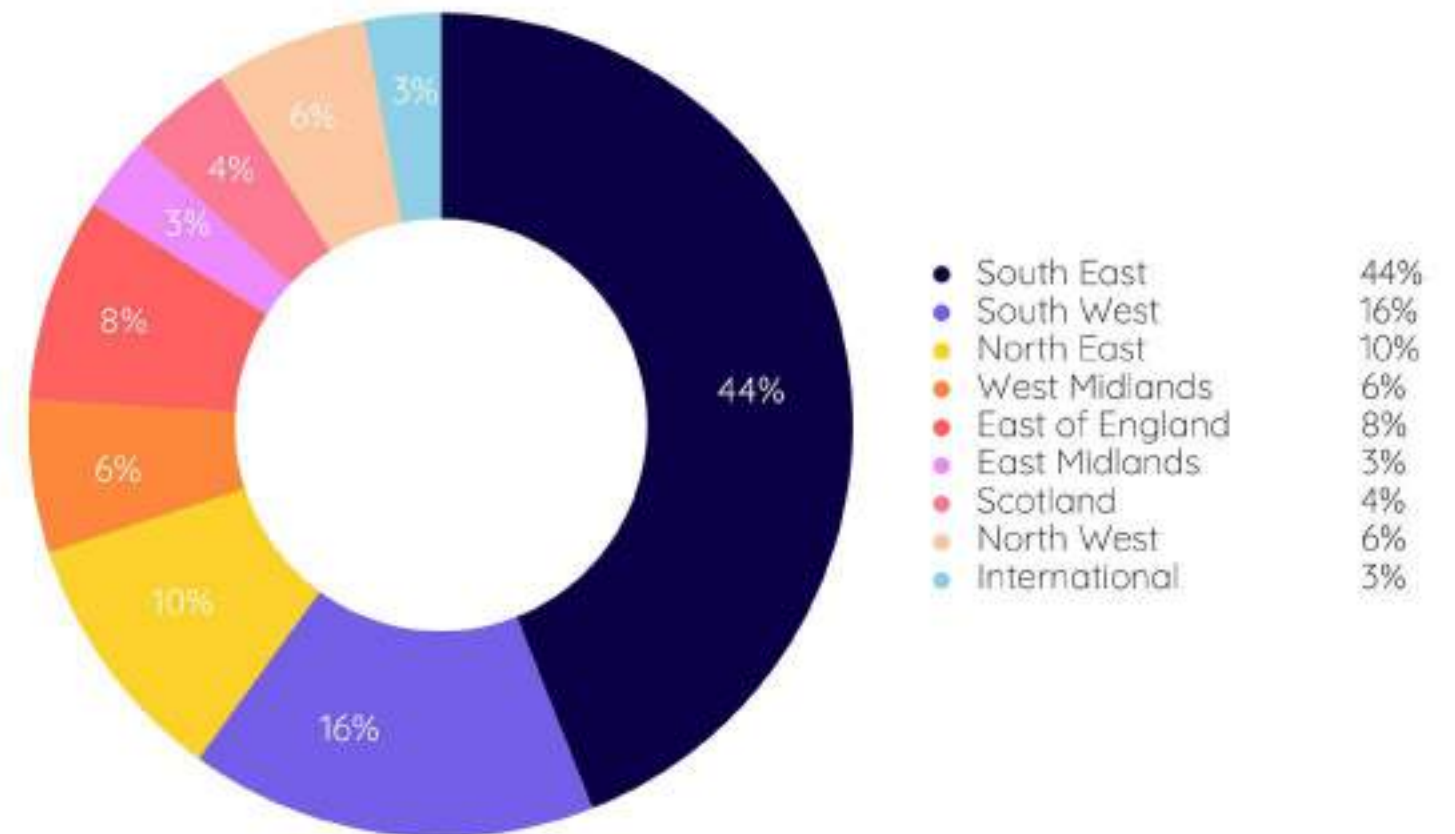
Tory Gillingham

CEO
AMCIS



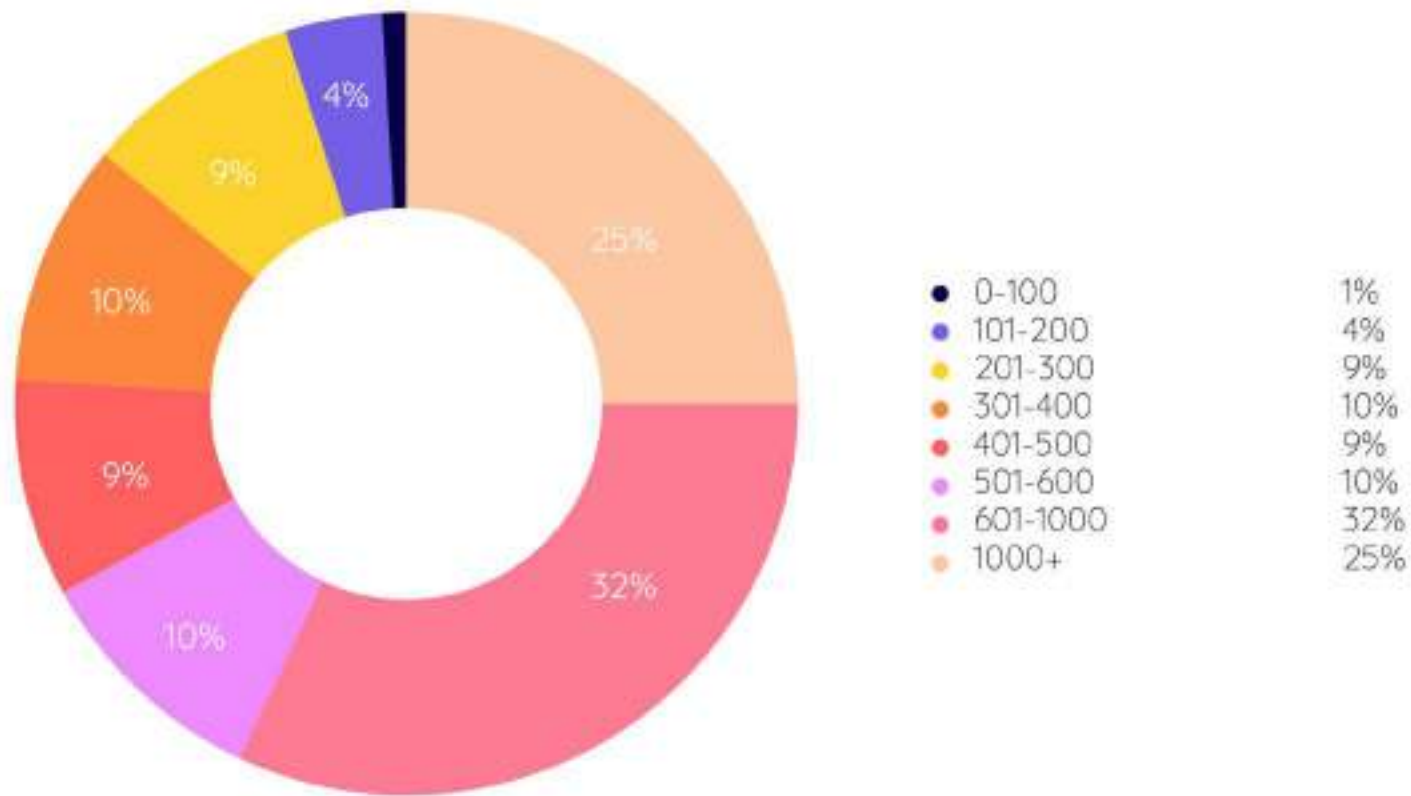
The Survey

The Sample: Location



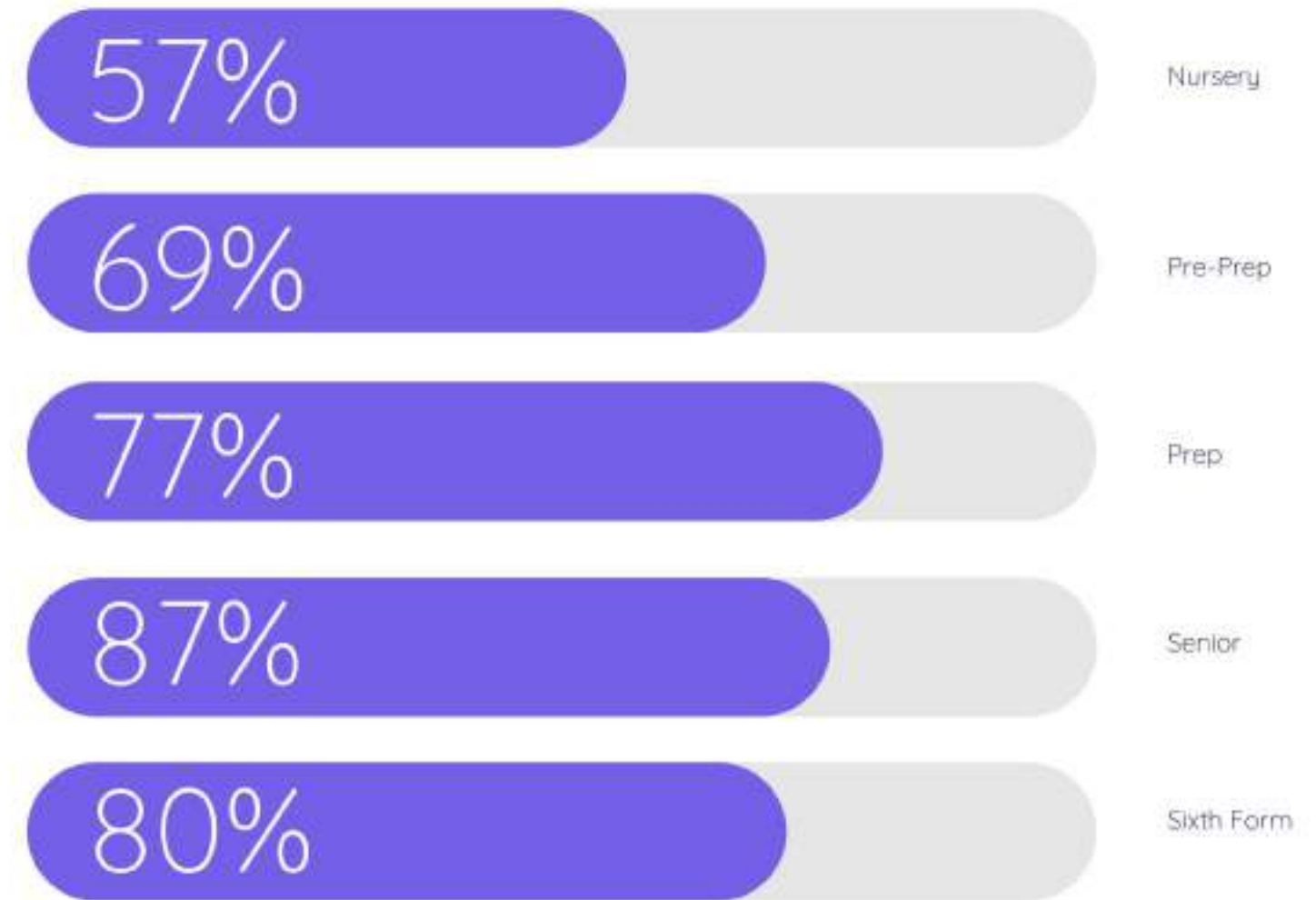
Almost half of respondents work in schools in the South East, whilst 16% are in schools in the South West. This is a similar weighting across the regions to last year.

The Sample: Number of Students



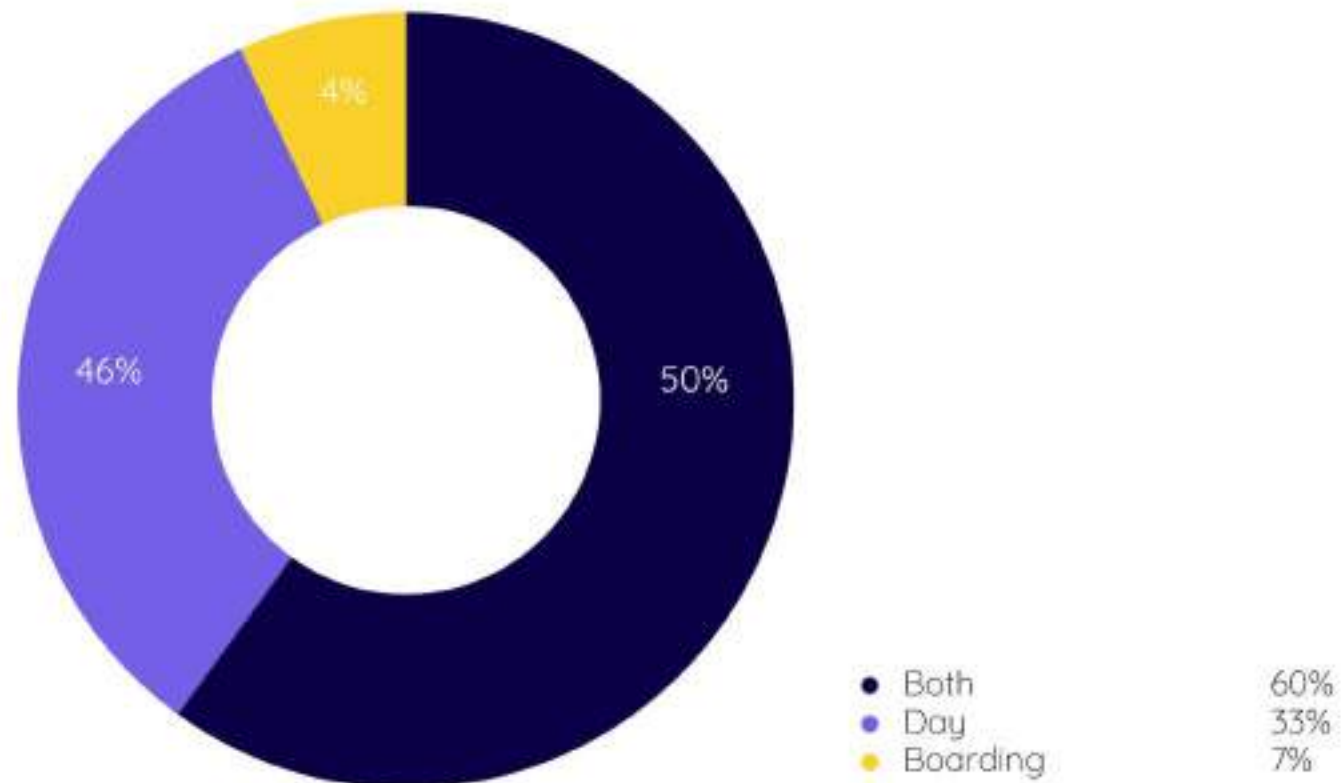
Schools with over 600 pupils once again represent just over half of respondents.

The Sample: Year Groups Covered



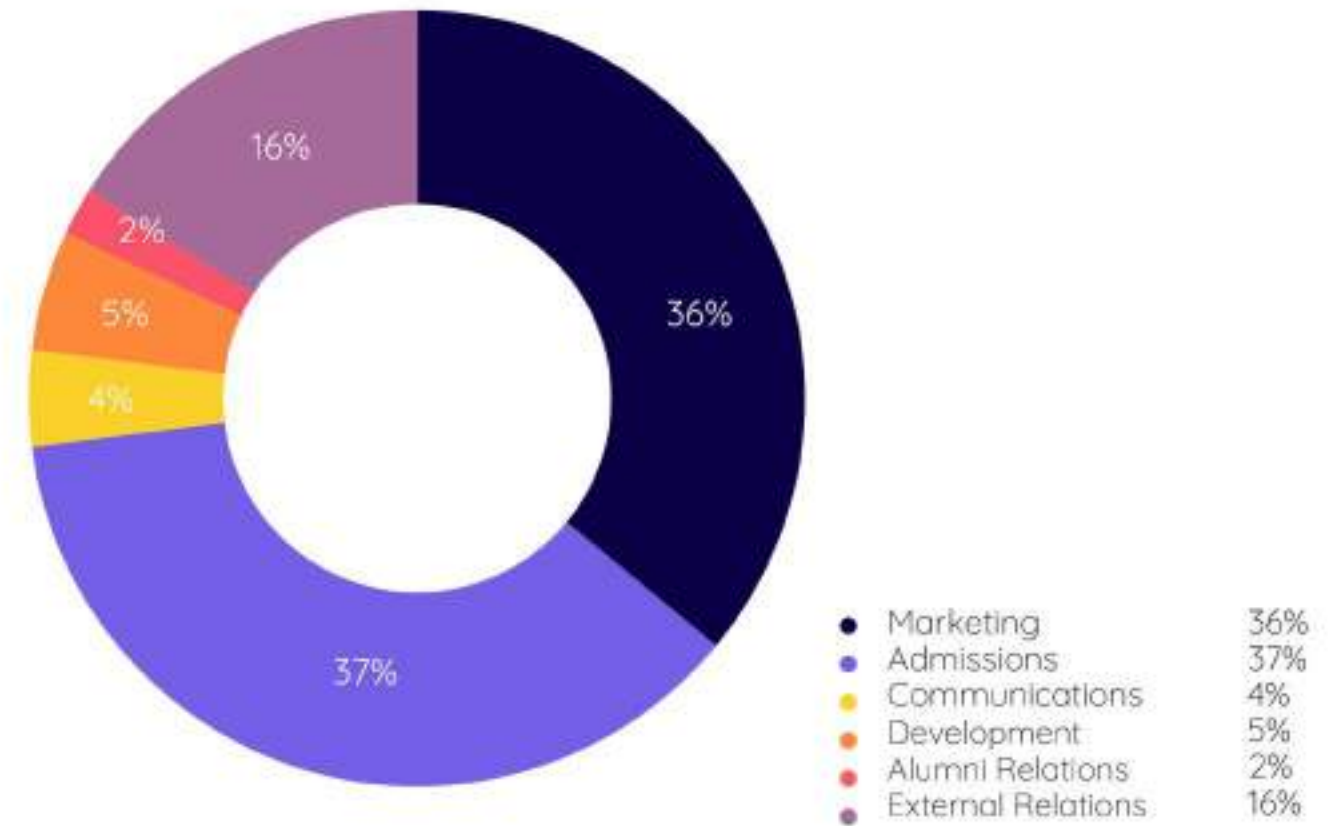
We then asked which sections schools covered, with three quarters covering Prep age and close to 90% covering Senior aged pupils. 41% of respondents are from schools that are all through (nursery to sixth form).

The Sample: Day School vs. Boarding School



Over half of schools describe themselves as both day and boarding, whilst 33% were day schools. This is a slightly larger proportion of 'both' compared to 2023 and 2022, with a lower number of day schools.

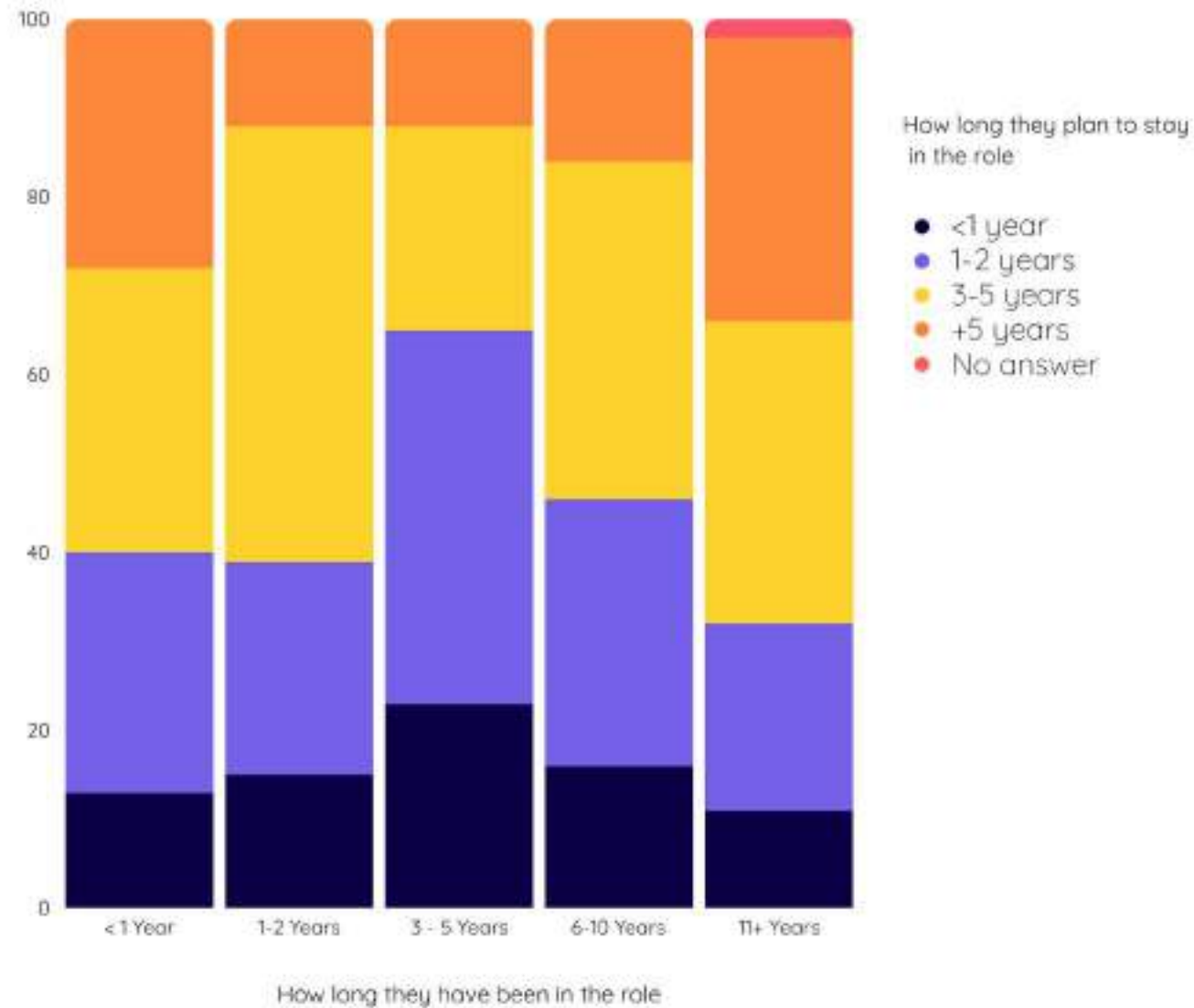
The Sample: Job Role



This year we have expanded the Marketing, Admissions and Development related roles surveyed, and are no longer surveying Heads and Bursars.

Marketing and Admissions staff continue to make up the majority of the respondents.

The Sample Length of Service

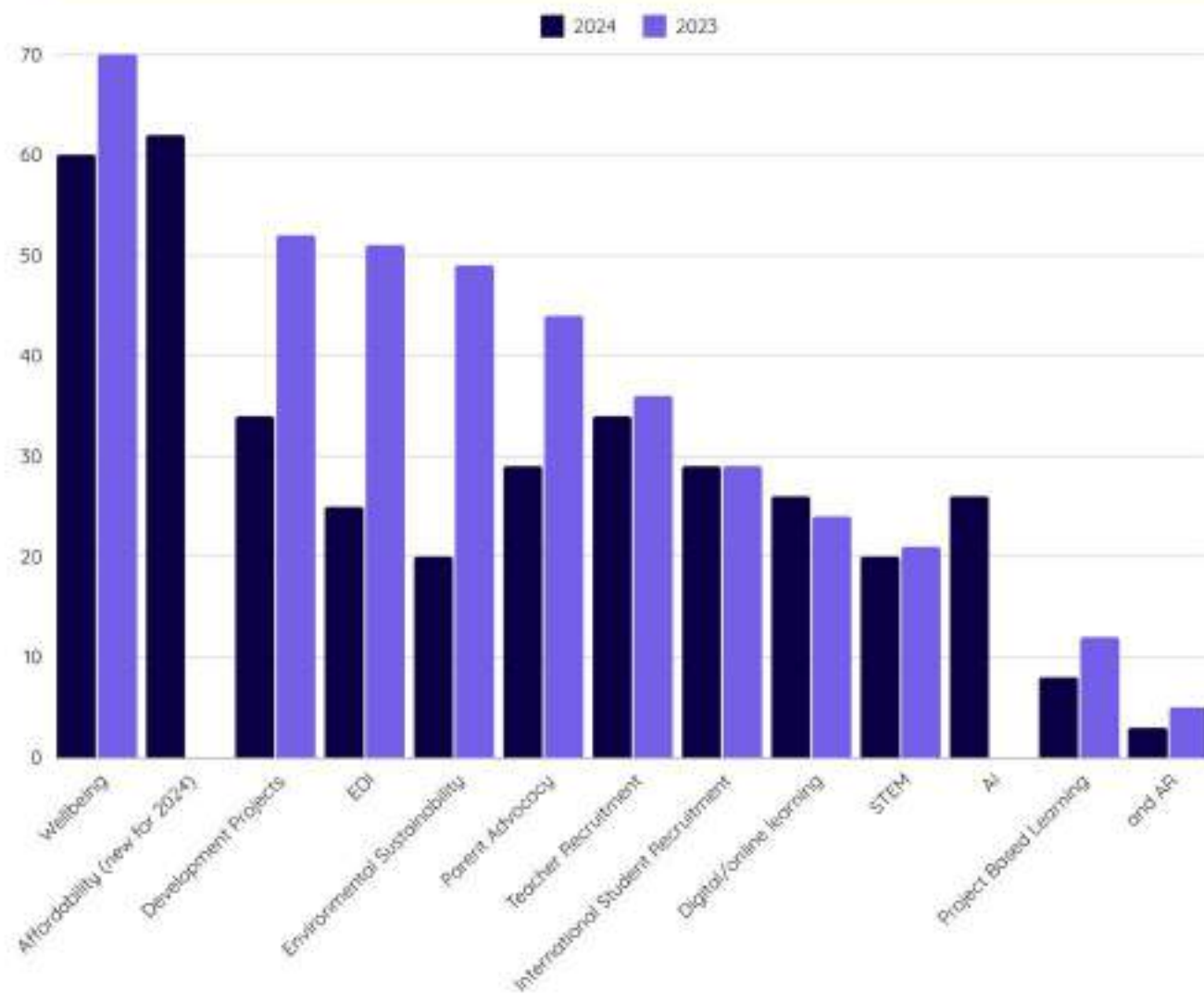


Research by the LV= suggests the average length of service in England is five years.

A high proportion of new team members look to move on in a short space of time.

Of the staff who have been in post for 3-5 years, a third plan to stay another 3-5 years. However, of those who have been in post for up to two years, 40% intend to leave within 2 years.

The most important area your school needs to focus on



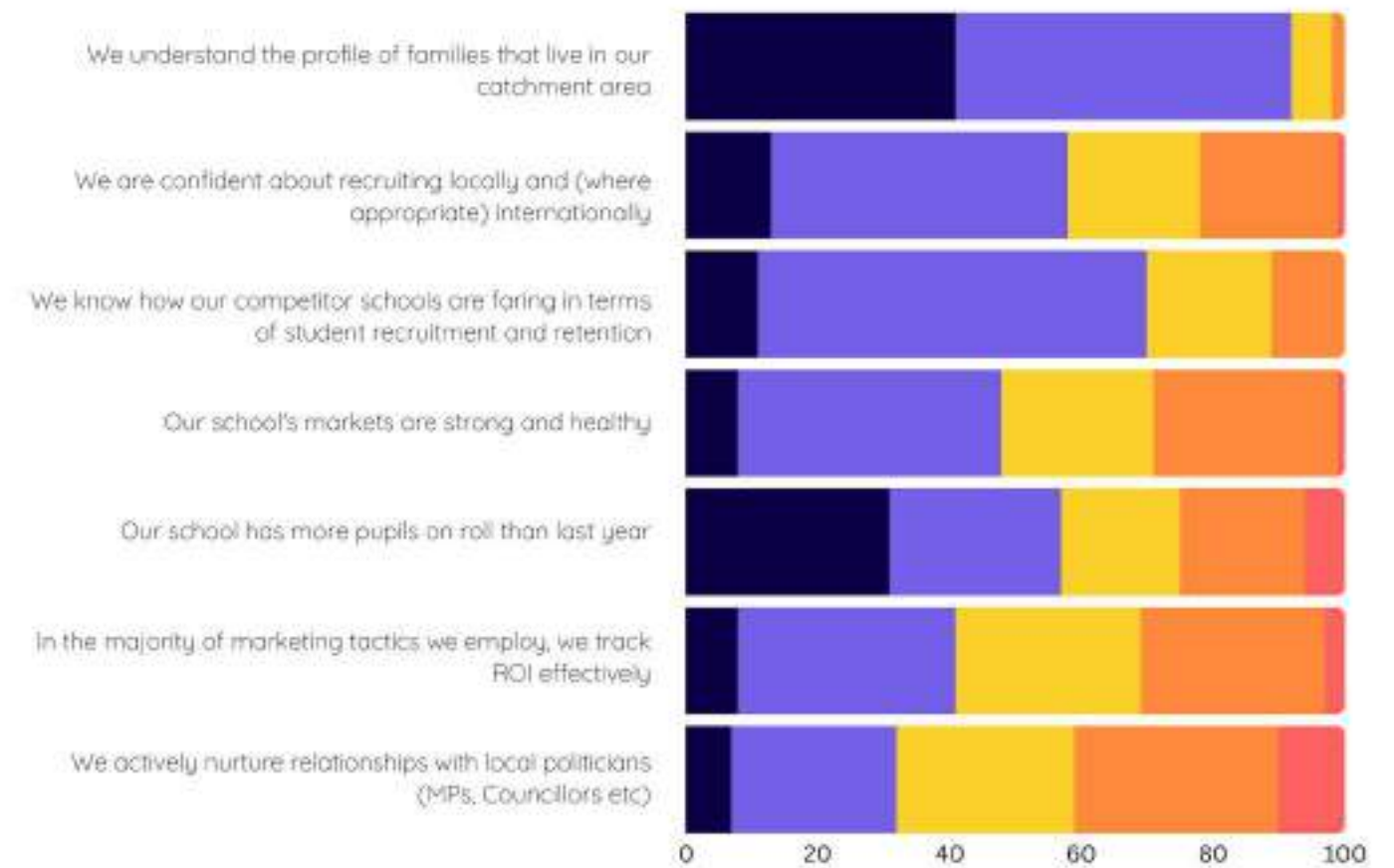
While pupil and staff wellbeing continued to be extremely important, affordability is now the most important issue, with over 60% of respondents selecting this option.

EDI and environmental sustainability have both decreased in importance in 2024 compared to 2023, as have development projects.

The shifting prioritisation of issues like EDI and Sustainability during challenging times implies they are perceived as ancillary rather than core concerns.

Marketing, Communications and Admissions

The Marketer: Marketing



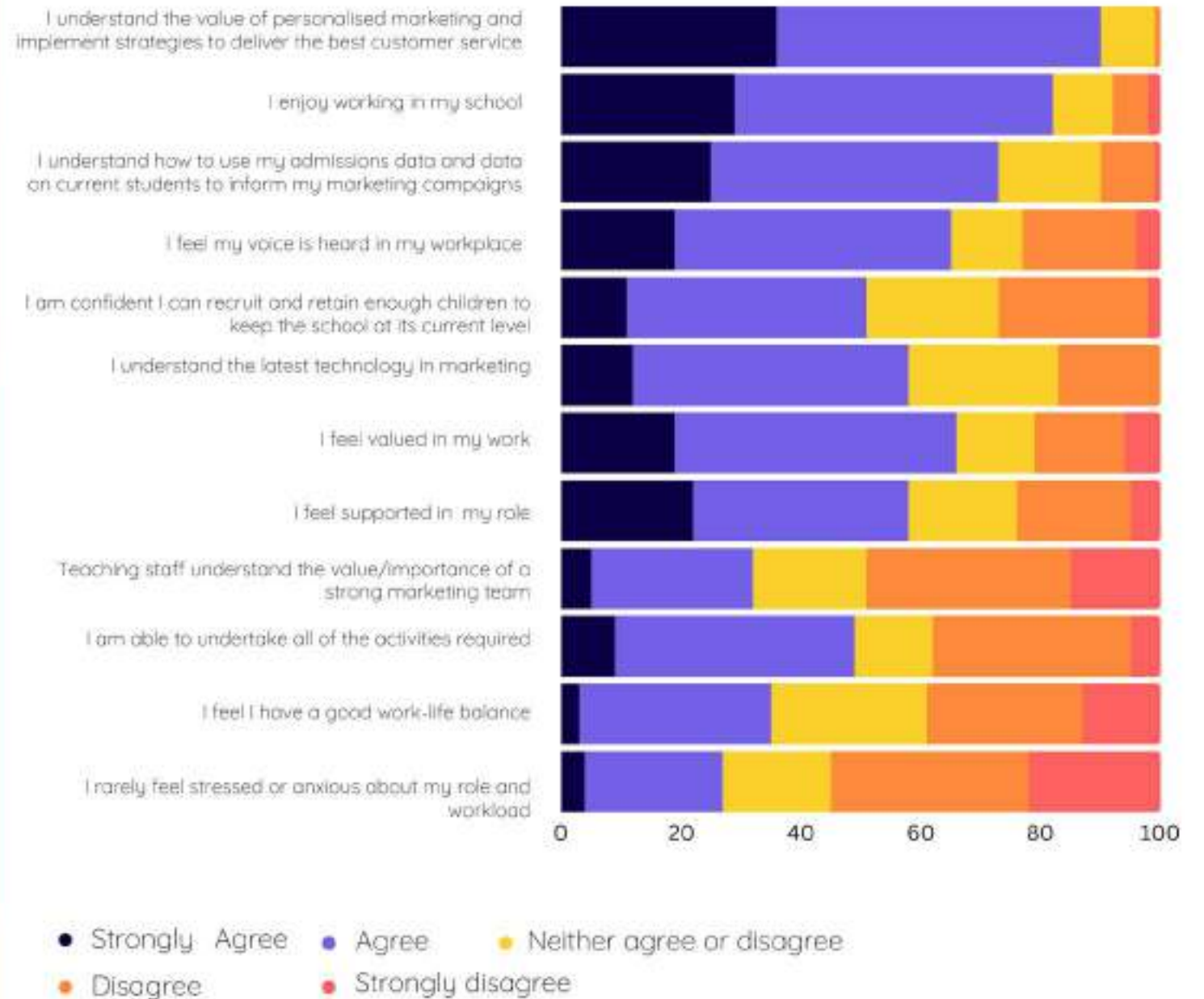
- Strongly Agree
- Agree
- Neither agree or disagree
- Disagree
- Strongly disagree

On the whole Marketers still feel they understand their local families, with an increase in understanding their competitors positions as well.

However, they have far less confidence in the health of the market. Last year, two thirds of marketers felt their markets were strong with this figure dropping to under half this year.

Lack of understanding from teaching staff around the value of a strong marketing team has been raised since the Confidence Index began in 2021. A significant proportion of Marketing, Admissions and Communications staff continue to feel unsupported.

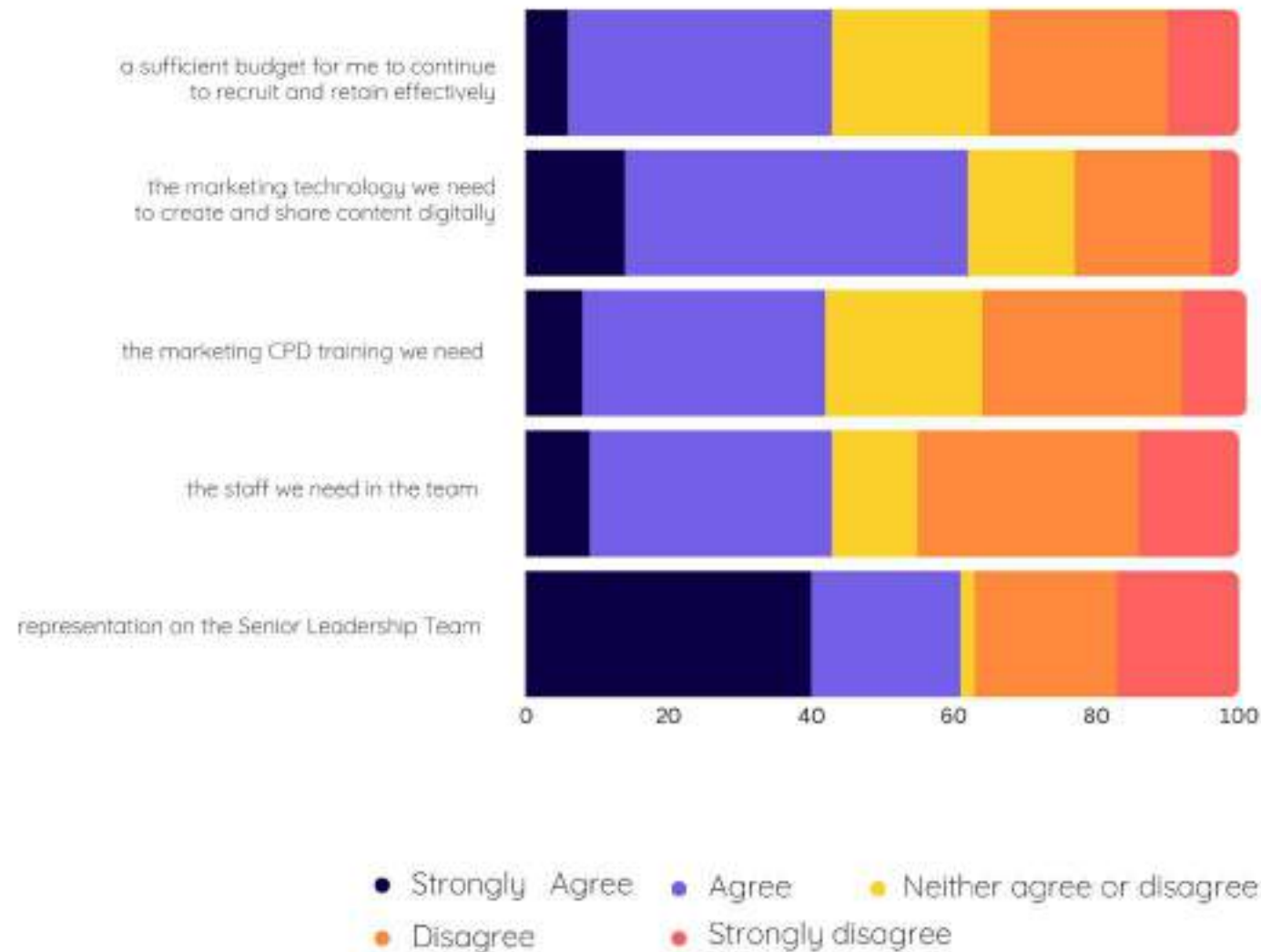
The Marketer: About me



Focussing on themselves, as per the 2023 results, most are confident they have the skills to do their jobs and to implement appropriate strategies. They enjoy working in their school and know how to use data in their roles.

Only a quarter of marketing, admissions and communications staff responded that they rarely feel stressed, although this is a small improvement on last year's results. Only one third feel that they have a good work life balance, and that teachers understand the value of a strong marketing team.

The Marketer: My Department - I have:



Figures show that representation on SLT is becoming more common for Marketing, Admissions and Communications.

Those without this representation should continue to advocate for their inclusion.

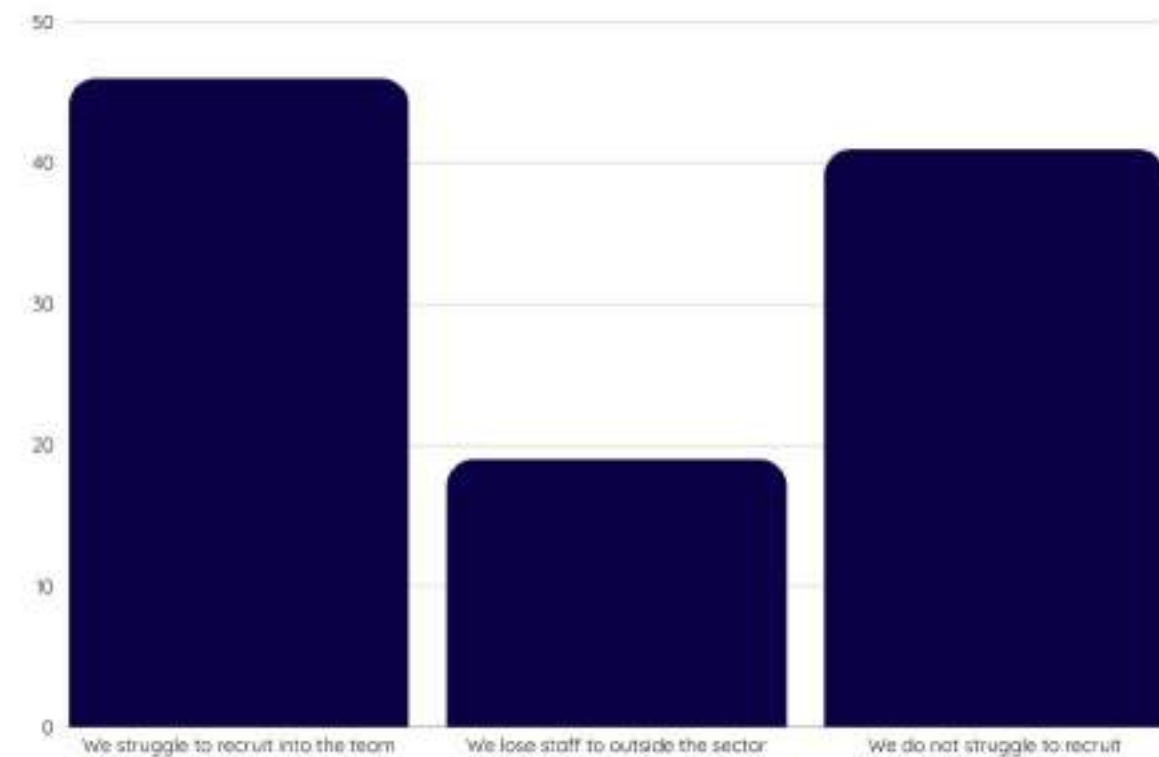
Less than half of staff working in Marketing, Admissions and Communications feel they have the resources (staff, CPD or budget) to operate effectively.

Happily 61% have representation on Senior Leadership Teams, although a third remain unrepresented at this level.

The findings remained consistent across different regions.

Nearly half of all respondents face recruitment challenges and this signifies a sector-wide issue across the nation.

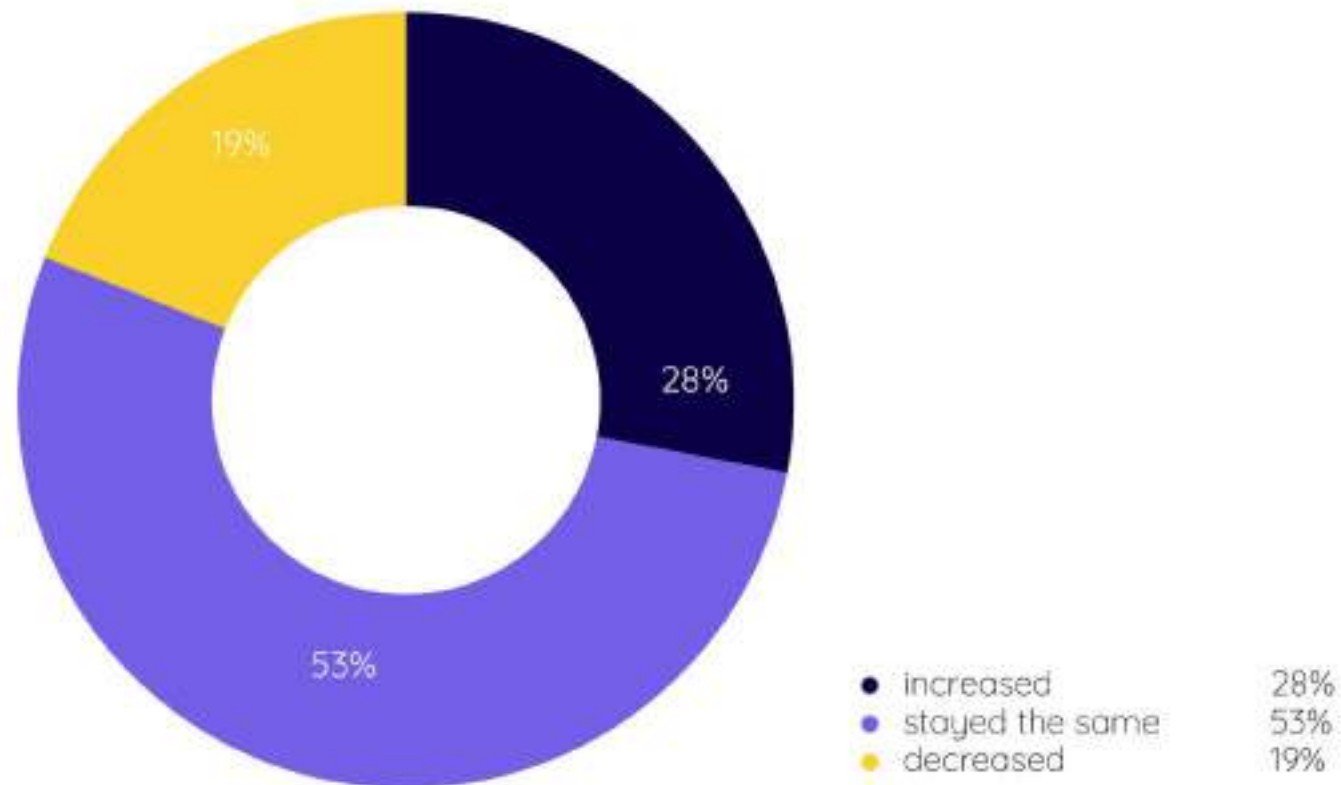
The Marketer: Recruitment



Recruitment of marketing, admissions and communications staff continue to be a big issue with almost half of all respondents confirming they struggle to recruit into the team and around a fifth losing people to outside the sector.

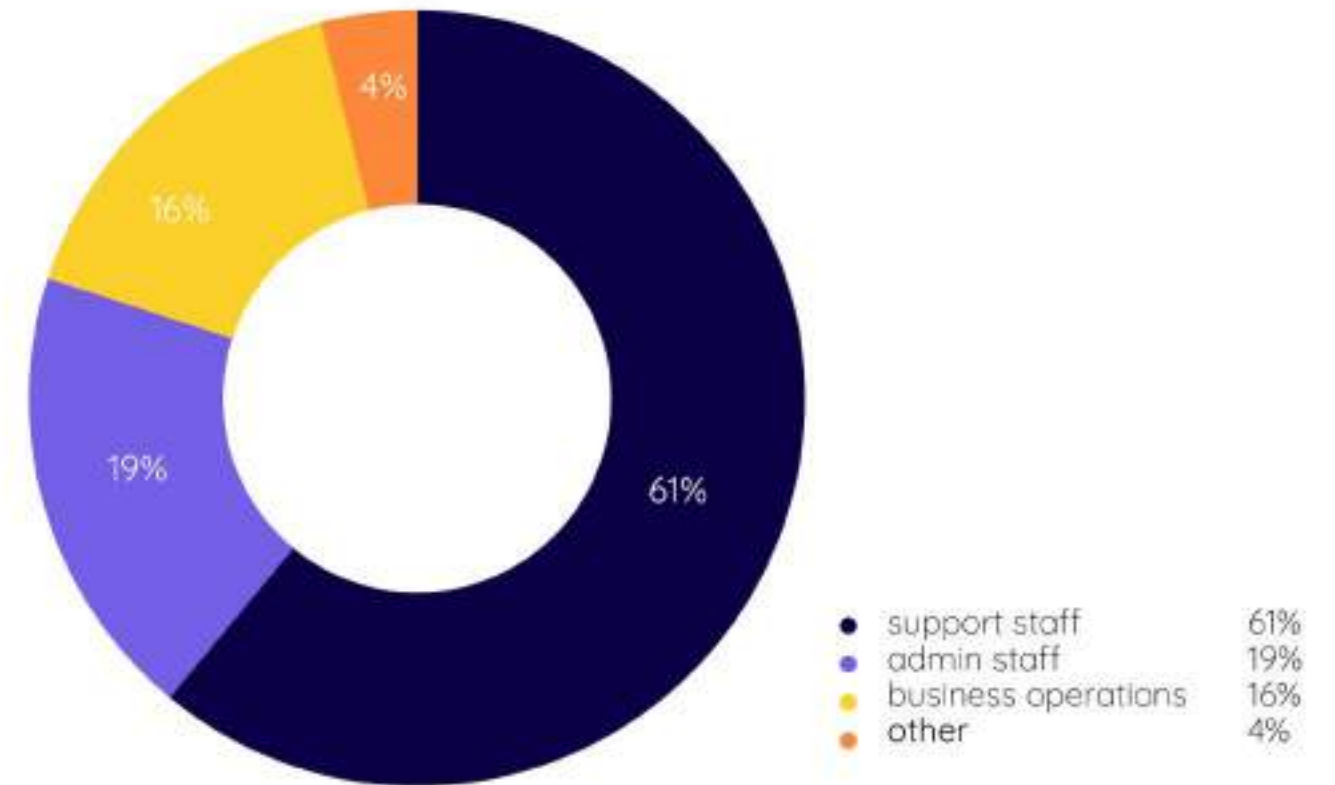
How closely linked are these problems with feeling valued, access to CPD and representation at senior level?

The Marketer: My Budget has...



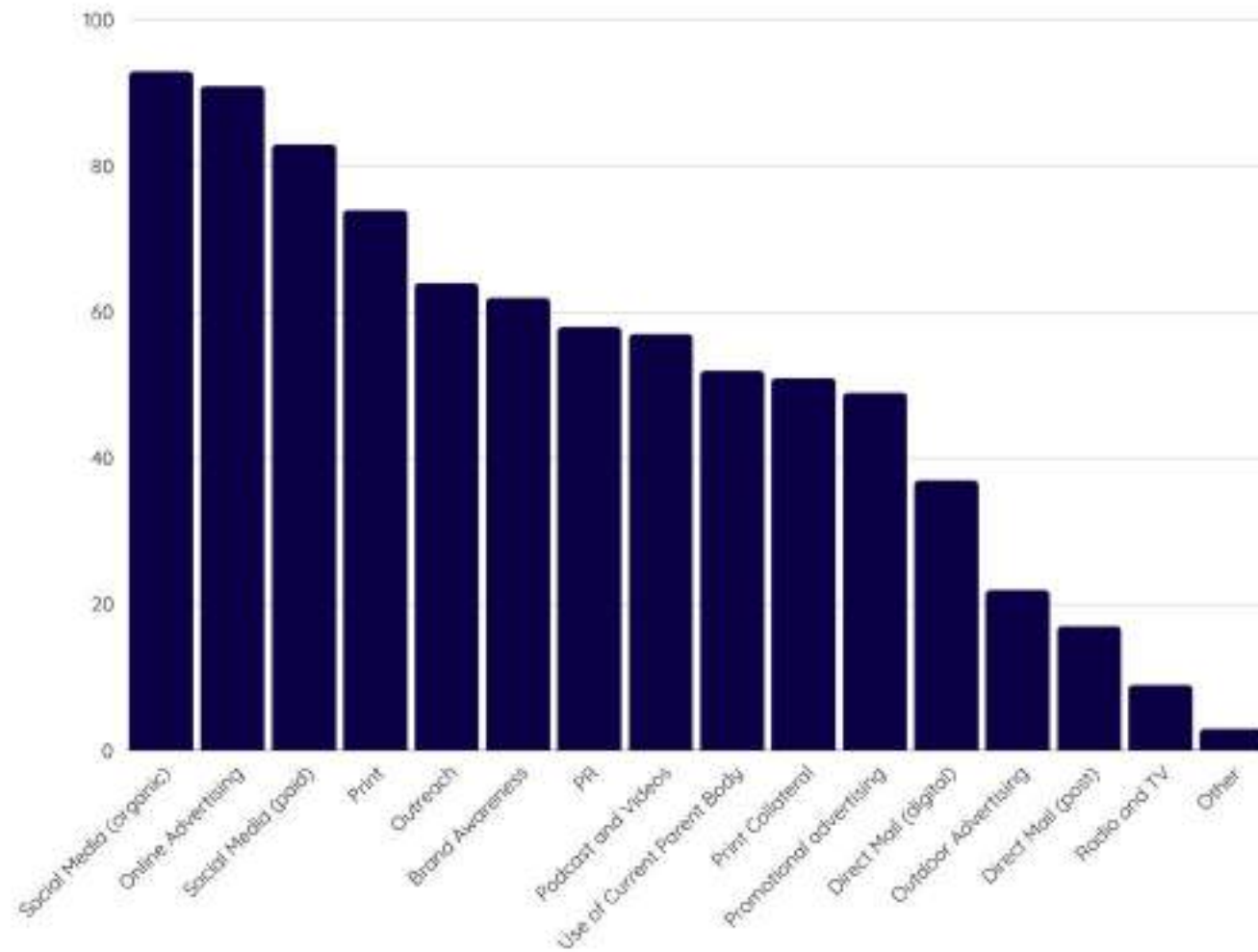
Three-quarters of budgets have either been cut or stayed the same, which given the fact costs have risen across the board, is a cut in real terms.

The Marketer: Context



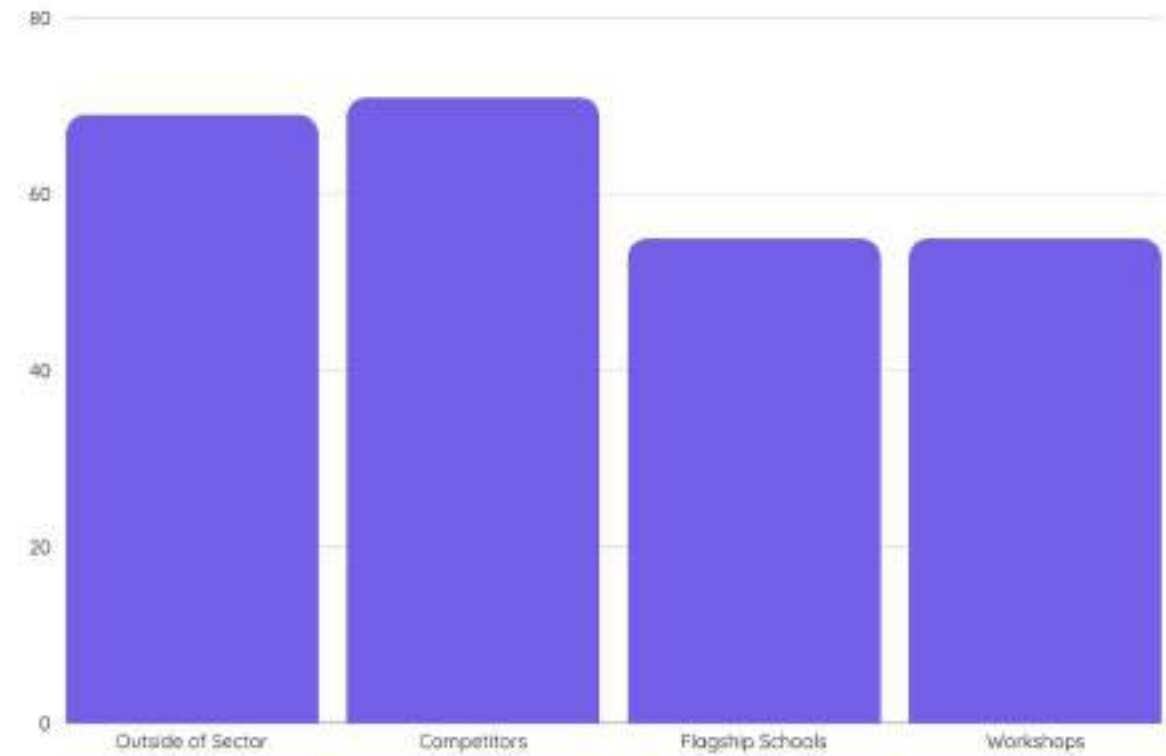
Other responses included non-teaching staff, and there were plenty of comments around perceptions of being less valued.

The Marketer: Marketing Tactics



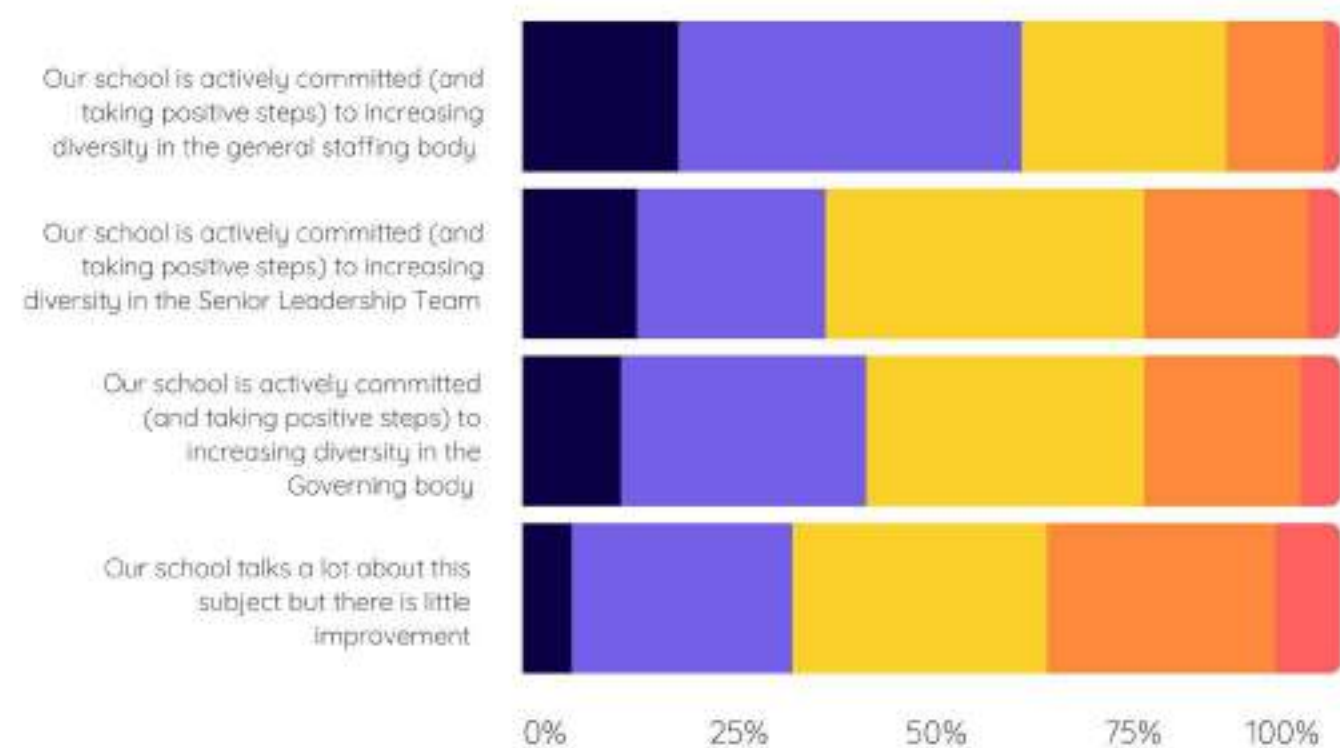
This is a new question for 2024. Despite the shift to digital, print remains strong in school marketing.

The Marketer: Inspiration



Inspiration comes from both within and outside of the sector. Workshops from organisations such as AMCIS also play an important role.

Equality, Diversity & Inclusion

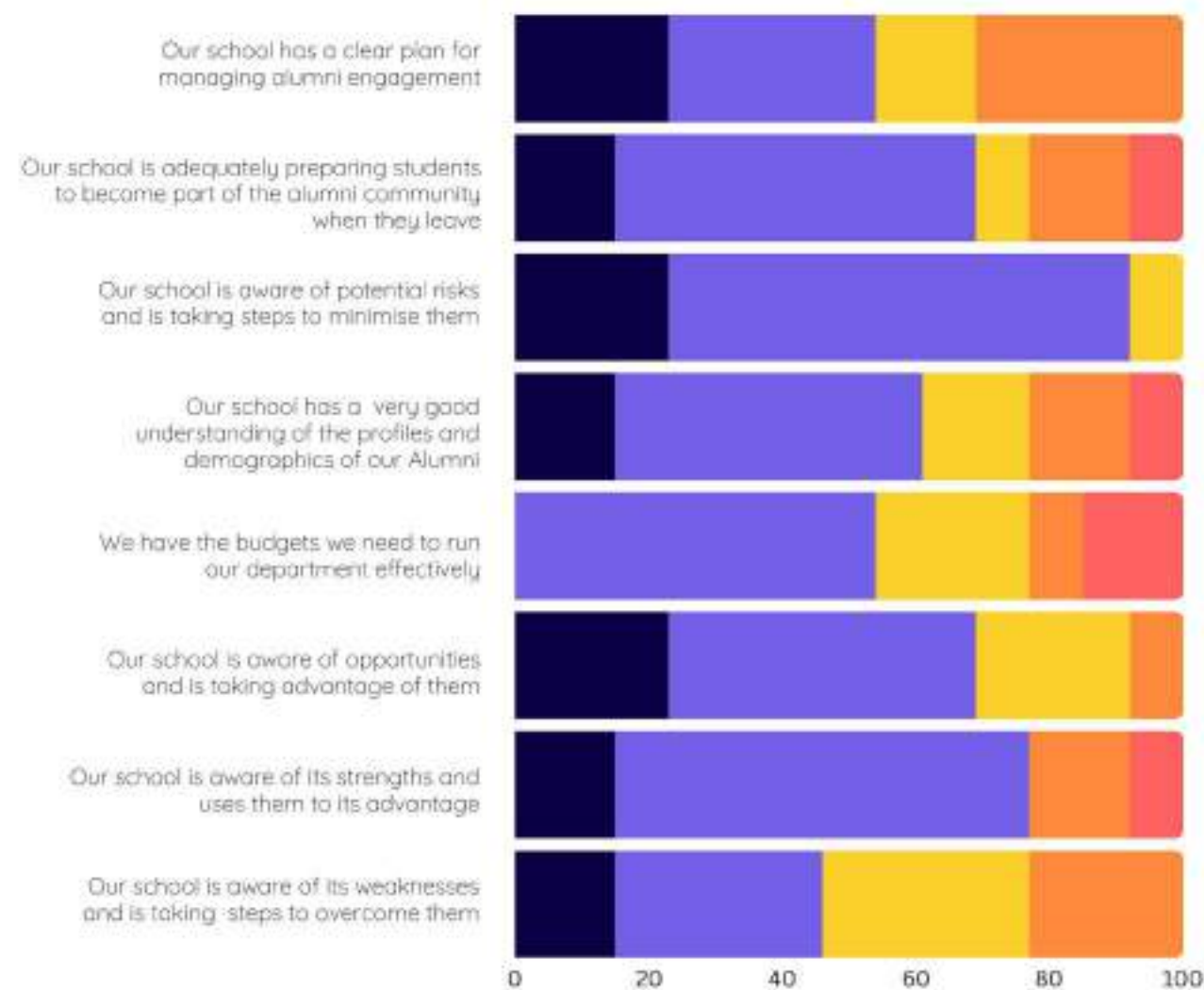


While well over half of respondents feel that their schools are committed to increasing diversity generally within the staff, this number drops considerably in reference to SLT and Governors. Worryingly one third feel that their school simply pays lip service to EDI.

Equality, diversity and inclusion (EDI) should be at the heart of everything a school does, as a place of education, a business and an employer.

Development

The Development & Alumni Office About my school context

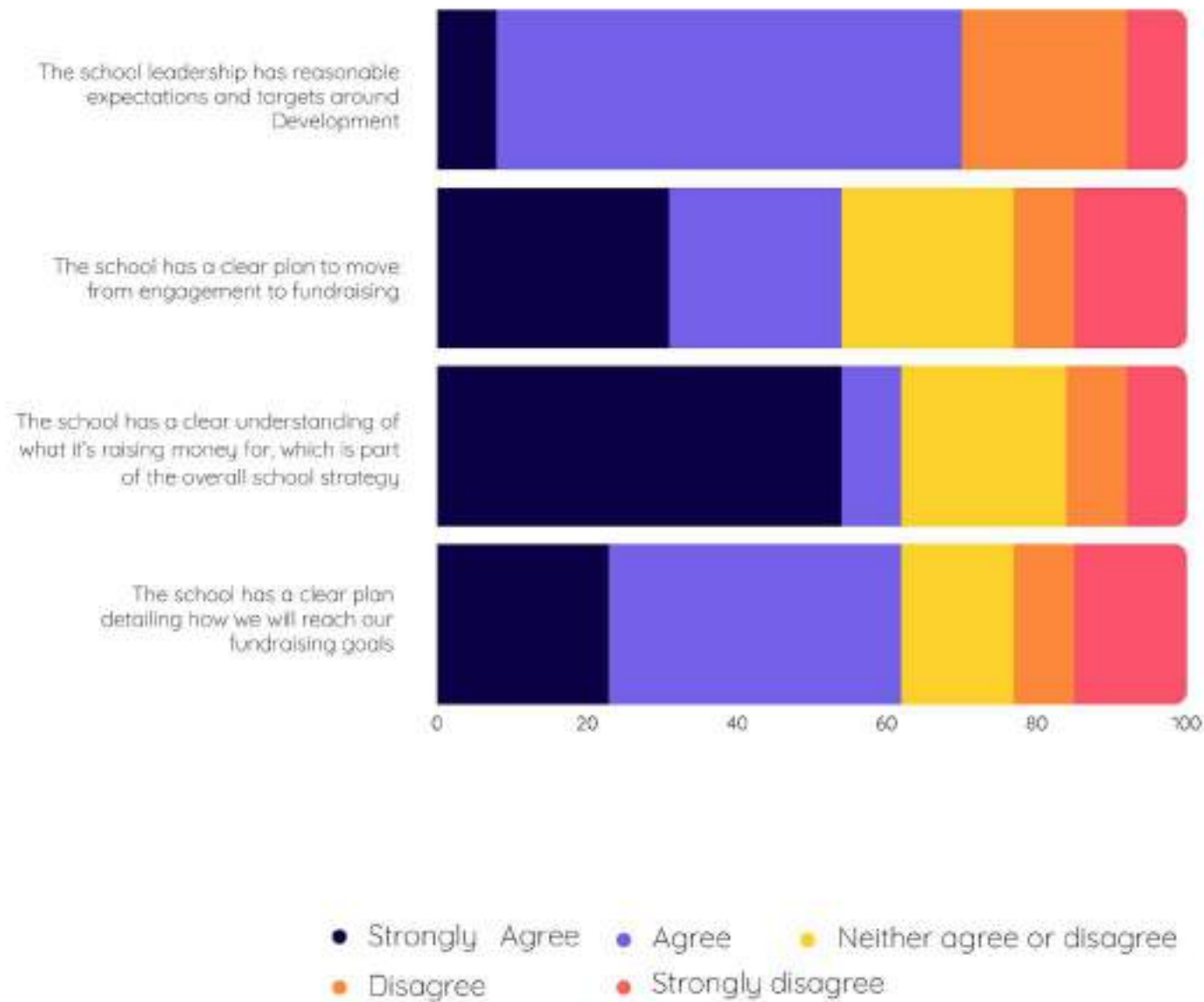


- Strongly Agree
- Agree
- Neither agree or disagree
- Disagree
- Strongly disagree

Confidence among Development and Alumni staff has become more mixed in the last 12 months. There is less confidence in alumni engagement and preparing pupils to become part of the alumni community.

Development and Alumni staff are however more confident in their schools' awareness of strengths and opportunities.

The Development & Alumni Office Fundraising

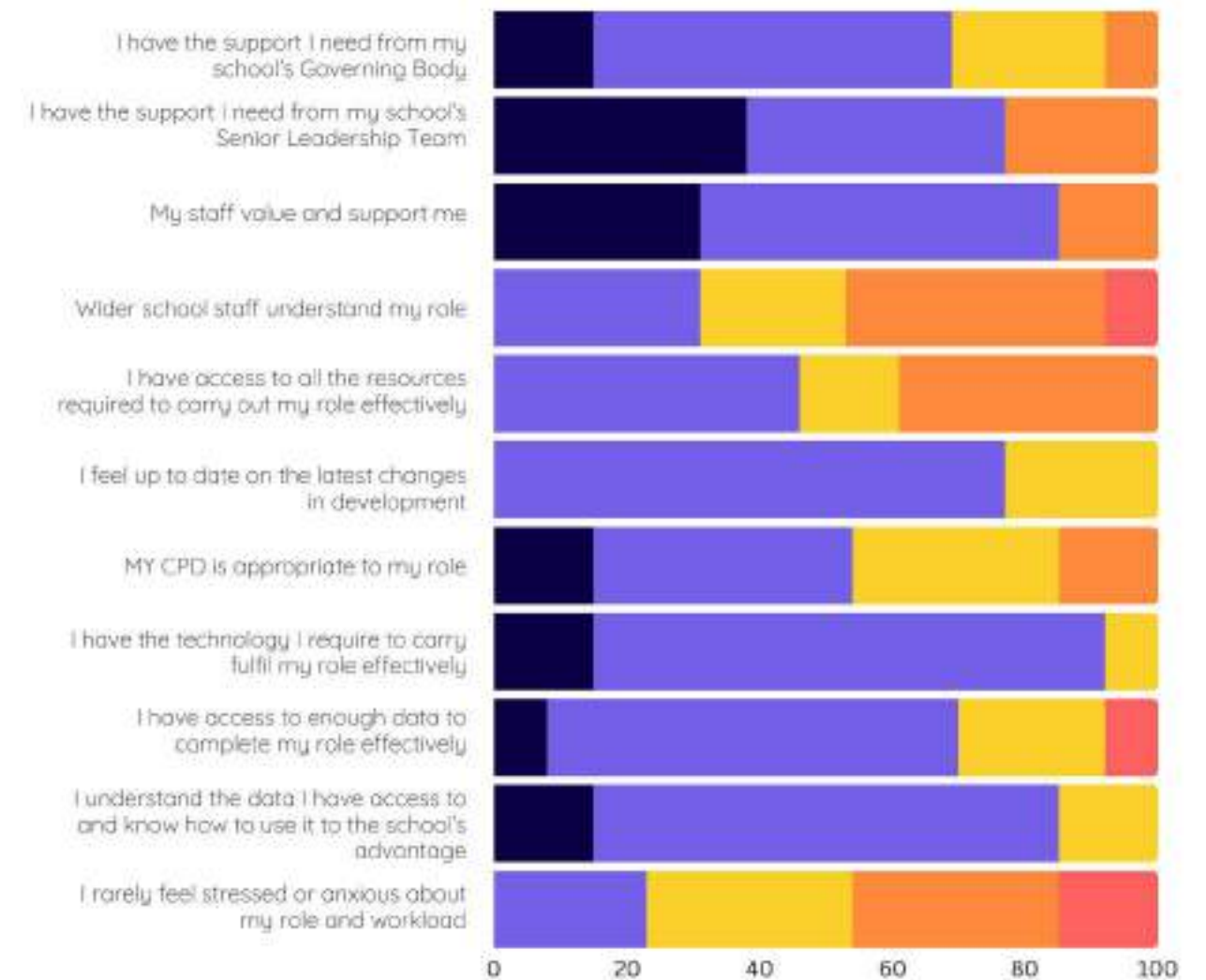


When asked about expectations and targets, most are happy that these are reasonable. However only two thirds are confident in the fundraising strategy - from understanding what the money is for to reaching their goals.

The case for support is the cornerstone of fundraising activity. Without a clear understanding of why a school is raising money it is difficult to make this case for support compelling.

The Development & Alumni Office About me

Development & Alumni and Marketing & Admissions staff feel similarly high levels of stress and anxiety. Given the proven impact that workplace culture has on stress levels, addressing the perceived division between different sectors of the school may foster a more cohesive and supportive work environment.



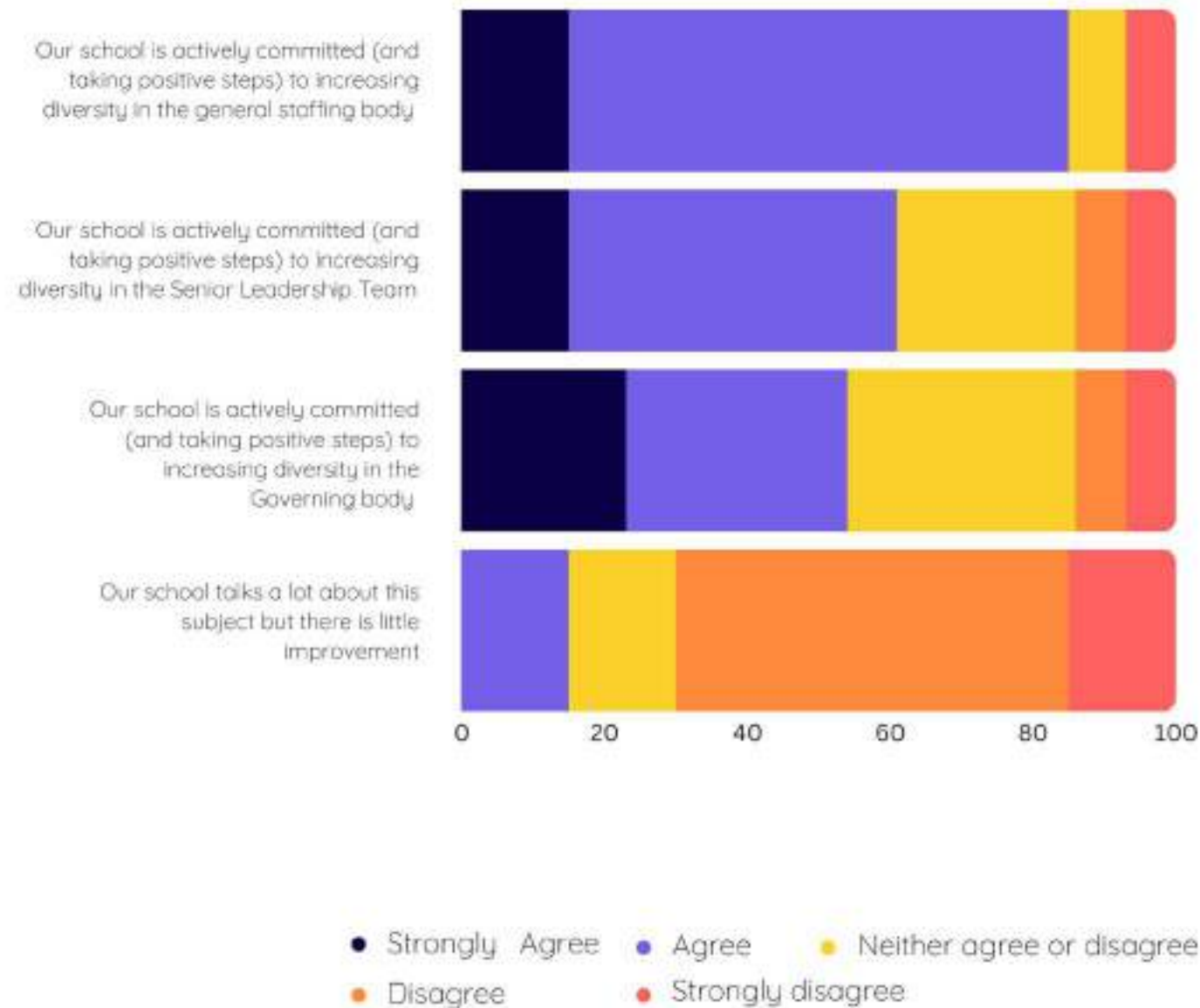
● Strongly Agree
 ● Agree
 ● Neither agree or disagree
● Disagree
 ● Strongly disagree

Development and Alumni staff continue to feel valued and supported by leadership, governors and their staff, although there is a wide lack of understanding of their role from the wider school community.

Generally respondents feel they have access to the resources they need to fulfil their role effectively.

Stress and anxiety has increased among this group of respondents with just under a quarter able to say they rarely feel stressed or anxious.

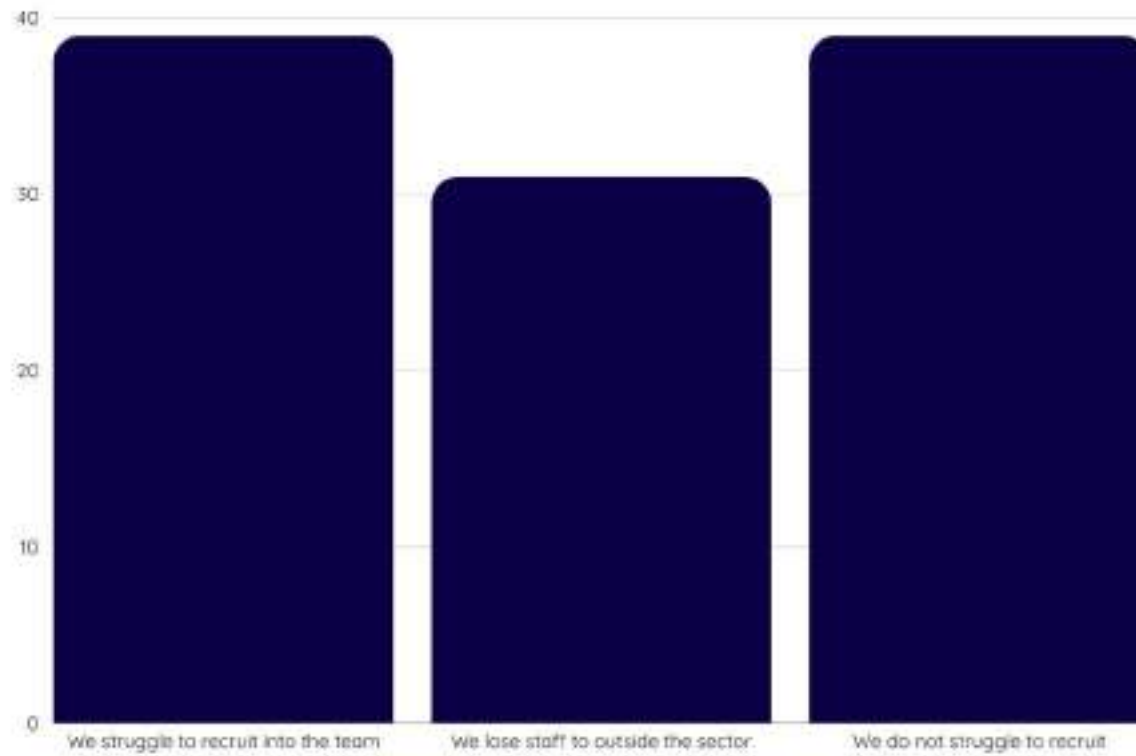
The Development & Alumni Office Equality, Diversity and Inclusion



There is more confidence in their schools' ability to make real change in the realm of Equality, Diversity and Inclusion among Development & Alumni staff than among Marketing & Admissions.

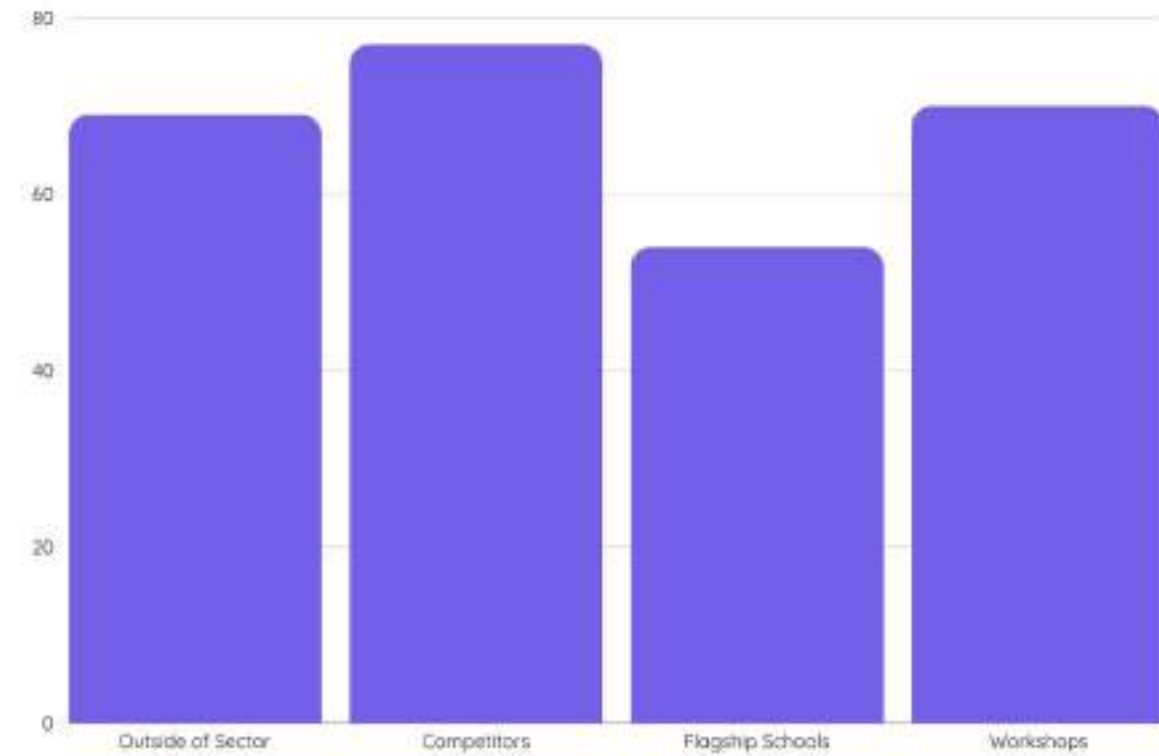
Development and Alumni staff were more positive about progress on Equality, Diversity and Inclusion. 85% of respondents disagreed that their school talked a lot about the subject but did not make improvements.

The Development and Alumni Office Team Recruitment



There is an even split between Development and Alumni Teams struggling to recruit and recruiting easily. A third of respondents feel that they lose staff to outside of the sector. The results were similar across all regions.

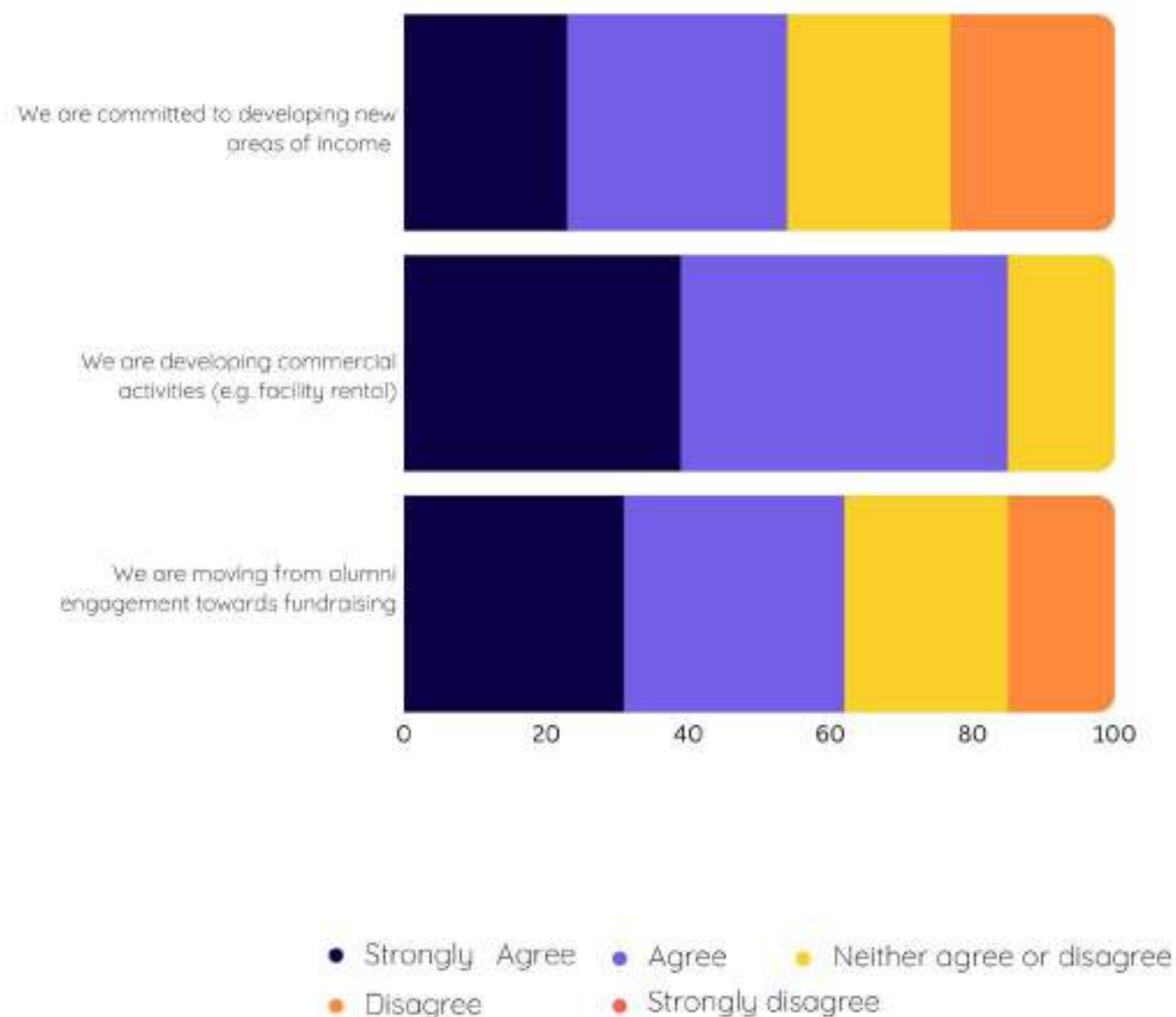
The Development and Alumni Office Inspiration



Inspiration comes from both within and outside of the sector. Workshops also play an important role with a number of respondents naming the IDPE as a valuable source of training.

The Development & Alumni Office

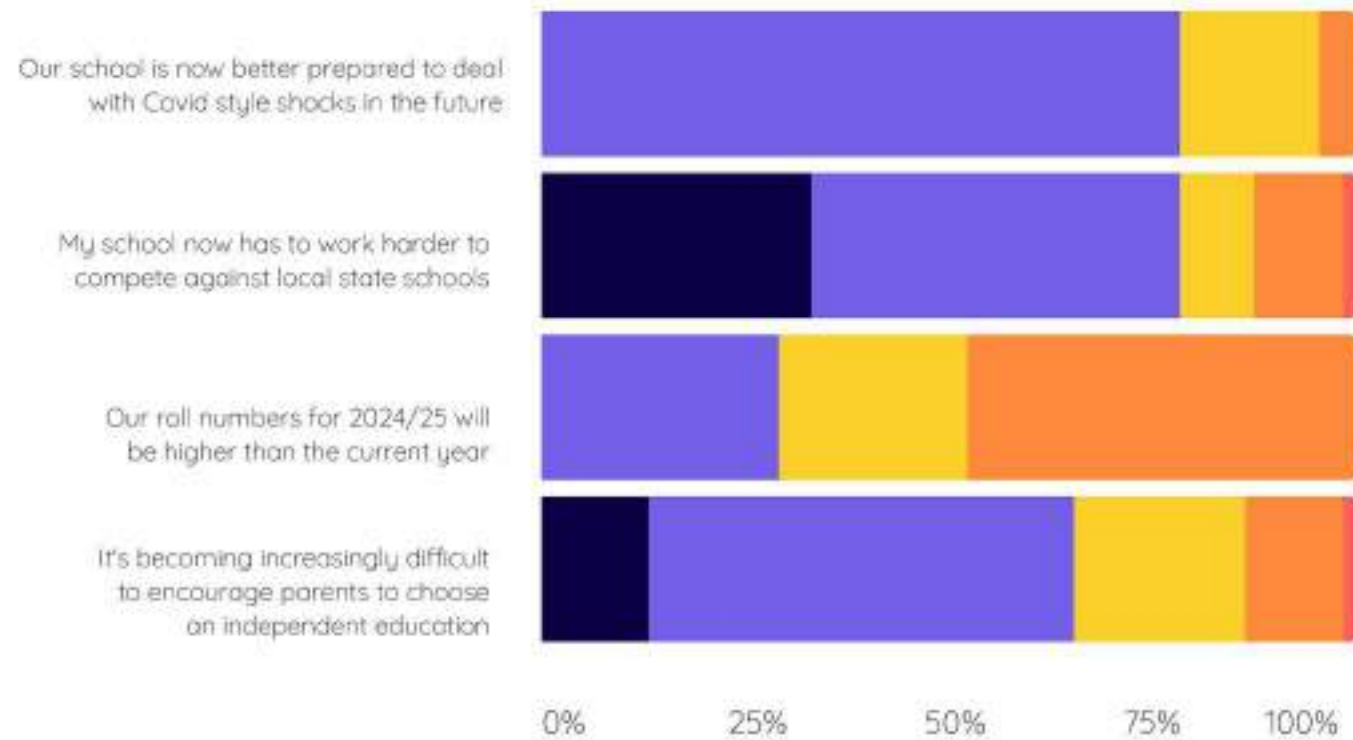
The Future



Three quarters of schools are actively looking at developing their commercial activities to generate more income, with over half also looking at moving their alumni engagement on to fundraising activities.

Many schools are exploring new income streams to help balance budgets that are under severe pressure. With schools employing their sites for educational purposes only 55% of the year, this leaves ample room to generate funds from rentals.

Looking Ahead

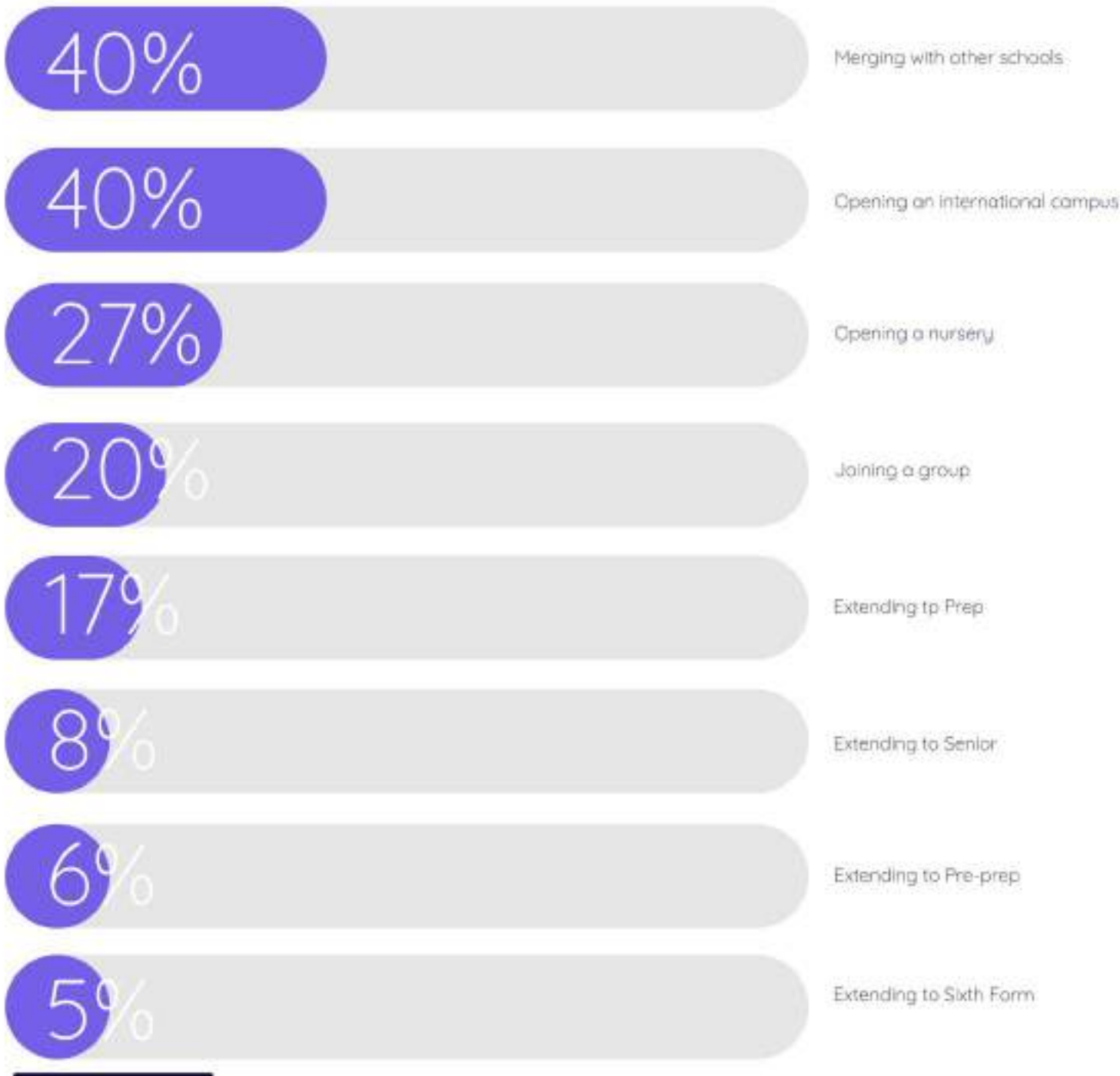


There is concern for roll numbers next year. In 2023, Marketers showed more positivity here than they have this year. This is perhaps due to the later timing of the Confidence Index 2024, closing after most offer acceptance deadlines.

Over 75% of respondents feel they now have to work harder than ever to compete with state maintained schools whilst only a quarter were confident about an increase in numbers for next year.

Perhaps unsurprisingly given the current climate, two thirds find it increasingly difficult to encourage parents to choose an independent education.

Potential vertical or horizontal integrations



The biggest change this year is in the number of schools considering opening a nursery, which has almost doubled since 2023. There is also an increased interest in international options.

The number of schools considering merging is consistent with last year's figures, which were a substantial rise on the 18% considering such a move in 2022.

At MTM Consulting, a large part of our work is on business strategy, helping schools understand the various options. These results bear out the increase we have seen in schools looking at mergers and acquisitions as a way of combatting increasing running costs.

MTM are a full service market research agency specialising in the Education Sector.

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