

What Parents Want

An Independent Schools Queensland Survey



**Key
Findings**

Survey Report
FEBRUARY 2019



ABOUT INDEPENDENT SCHOOLS

Queensland parents have been exercising their right to school choice for as long as some of the state's oldest independent schools have been serving their local communities – more than 150 years.

Independent schools are autonomous, not-for-profit institutions run and governed at the local level.

ACKNOWLEDGEMENT

This survey was commissioned by Independent Schools Queensland (ISQ).

For 51 years ISQ has been a united and powerful voice for Queensland's independent schooling sector and a fierce advocate for parental choice in schooling. ISQ is a representative body for independent schools, not a regulator or governing authority.

Dr Deidre Thian, Principal Consultant (Research) at ISQ is acknowledged for her work in the preparation of the 2018 report findings of the fourth *What Parents Want – An Independent Schools Queensland Survey*.

SCHOOL IMAGES

St John's Anglican College (cover)
Mueller College (inside cover)
Somerville House
Matthew Flinders Anglican College
The Cathedral School of
St Anne & St James
The Spot Academy

School images are not necessarily aligned with the response quotes listed throughout this document. Quotes are a diverse selection from the 2018 survey.

SECTOR SNAPSHOT

STUDENTS: 121,000

15% of all Queensland students
20% of all Queensland high school students
64% of all domestic boarding students

SCHOOLS: 205

12% of all Queensland schools

SCHOOL TYPES

149 Combined
26 Primary
26 Secondary
4 Special

SCHOOL GENDER

184 Co-educational
21 single-gender

FAMILIES

Independent schools serve families from all income levels

What Parents Want Survey 2018

What Parents Want – An Independent Schools Queensland Survey is the longest running survey in the country exploring why parents choose independent schools.

The survey delves into the decision-making processes of independent school parents relating to the child who had most recently commenced schooling at an independent school. The survey examined the:

- schools considered;
- decision-making timeframe;
- information sources; and
- key factors influencing final school choice.

Survey Series

- Four surveys over 12 years – 2006, 2010, 2014, 2018

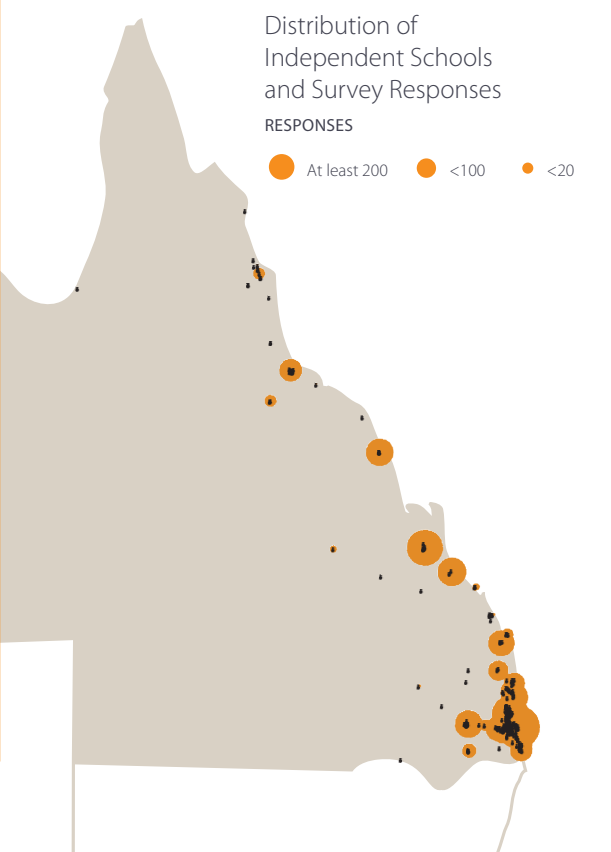
2018 Survey

- Second highest response rate in survey's history – 3,638 parents of children at 115 Queensland independent schools reflecting a representative snapshot of the sector by location, school type, parental background and student enrolments
- First analysis by parent generation – broadly representing Baby Boomers, Generation X & Generation Y
- First analysis of the influence of social media on school choice.

Distribution of Independent Schools and Survey Responses

RESPONSES

● At least 200 ● <100 ● <20



I chose an independent school because of learning opportunities in the classroom... I want my child to reach their full potential without being disadvantaged by others.

PARENT RESPONSE ID 49



Executive Summary

These are the top line findings from 3,638 parents with children at 115 independent schools who participated in the 2018 survey.

Top Line Findings

Schooling options

Queensland families are well served by schools in three schooling sectors – independent, state and Catholic.

When parents weighed up their schooling options:

- 1 in 2 parents (46%) only considered independent schools, while almost 1 in 3 (31%) looked at schools from all three sectors.

Students moving schools

Parents who move their child to a new school do so for a range of reasons.

- 1 in 2 new students in Years 1-12 (55%) who transferred to an independent school in 2018 had previously attended a state school. A further 26% came from other independent schools and 17% from Catholic schools.

Decision timeframe

School selection can be top of mind for some parents, in some cases even before their children are born.

- 2 in 3 parents (65%) started their decision-making process at least two years before their child commenced school – this includes 1 in 4 (24%) who started before or from their child's birth.

Parent sources of information

The most influential information sources parents rely on are:

- Family, friends and colleagues – identified by 67% of parents
- Other parents with children at the school (54%)
- School open days (47%)
- School website and social media (40%)
- Family members already attending the school (24%).

Meeting school representatives

Parents value the opportunity to meet school staff.

The staff parents most want to meet, in order of importance, are:

1. Classroom teachers
2. Principal
3. Students
4. Deputy Principal
5. Parents of current students.

Not surprisingly, parents of boarding students nominated the Boarding Master/Mistress as the most critical staff member to meet face-to-face.

School facilities

First impressions of a school count.

- 7 in 10 parents (70%) said their choice of school was totally or highly influenced by the look of the school and facilities on offer.

Child's opinion

Children are having a greater say in their future school.

- 5 in 10 parents (53%) said their choice of school was totally or highly influenced by their child's opinion.

Parent generations

First-time analysis of survey responses by generation, revealed a range of insights about early 30-something and younger Generation Y parents.

Compared with other generations these parents of primarily Prep and primary students are more likely to:

- consider all three schooling sectors, yet only register their child's name on one school waiting list
- rely on friends, family and colleagues as an influential source of information
- be heavily influenced by a school's external appearance and facilities
- rate school-generated social media as very or extremely useful.

The final decision

School choice is a very personal decision for families.

However, there are common factors parents identify. The top 10 reasons why parents choose independent schools:

1. Preparation for student to fulfil potential in later life
2. The high quality of teachers
3. School seemed right for child's individual needs
4. Good discipline
5. Teaching methods/philosophy
6. Encouragement of responsible attitude to school work
7. Reputation of school
8. Emphasis placed by school on developing student's sense of community responsibility
9. Range of subjects offered
10. Size of school.

Applying for enrolment

The final school a child attends may ultimately come down to whether there is a place available.

- 3 in 4 parents (74%) put their child's name on a waiting list, with 1 in 2 (55%) of these parents only putting their child's name down at one school. The remainder (45%) registered at two or more schools.

Paying fees

Parents often make significant financial sacrifices in other areas of their lives to send their child to an independent school. The overwhelming majority of parents pay for their child's education from their after-tax income.

- 9 in 10 (93%) parents rely on their salaries, either wholly, or in combination with other sources such as part scholarship/bursary, or other family members, to meet schooling costs.

Independent schools offer the very best chance for the developing individual and all they can contribute to the world.

PARENT RESPONSE ID 3672

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Survey Trends

What Parents Want provides telling insights into parent decision-making trends over time. However, it's important that changes in school decision-making are put in context by examining them alongside important policy, economic and social changes over the same period. These societal milestones can also have an impact on the school choices families make.

What Parents Want Survey Trends 2006–2018

Independent school parents are more likely to weigh up all available schooling options in Queensland's three schooling sectors – 31% in 2018 compared with 17% in 2006.

Parents are now more likely to plan ahead to pay for school fees – 65% in 2018 compared with 55% in 2006.

More parents are thinking ahead about school choice and researching schools for at least two years before their child starts school – 65% in 2018 compared with 58% in 2006.

The overwhelming majority of children now entering Prep at Queensland independent schools have already attended kindergarten – 92% in 2018 compared with 66% in 2010.

Parents are more likely to base their decisions, wholly or to a significant degree, on the appearance of a school and its facilities – 70% in 2018 compared with 42% in 2006.

Children continue to have a strong influence on the schools their parents are choosing – 53% in 2018.

Family, friends and colleagues have been the most turned to and influential source of information on school choice for parents across all four surveys since 2006.

More parents are relying on My School as one of their top three most influential sources of school information – 18% in 2018 compared with 8% in 2010.

Parents have consistently nominated “preparing students to fulfil their potential in later life” as their top reason for choosing an independent school in every survey.

Social, Economic and Policy Change 2006–2018

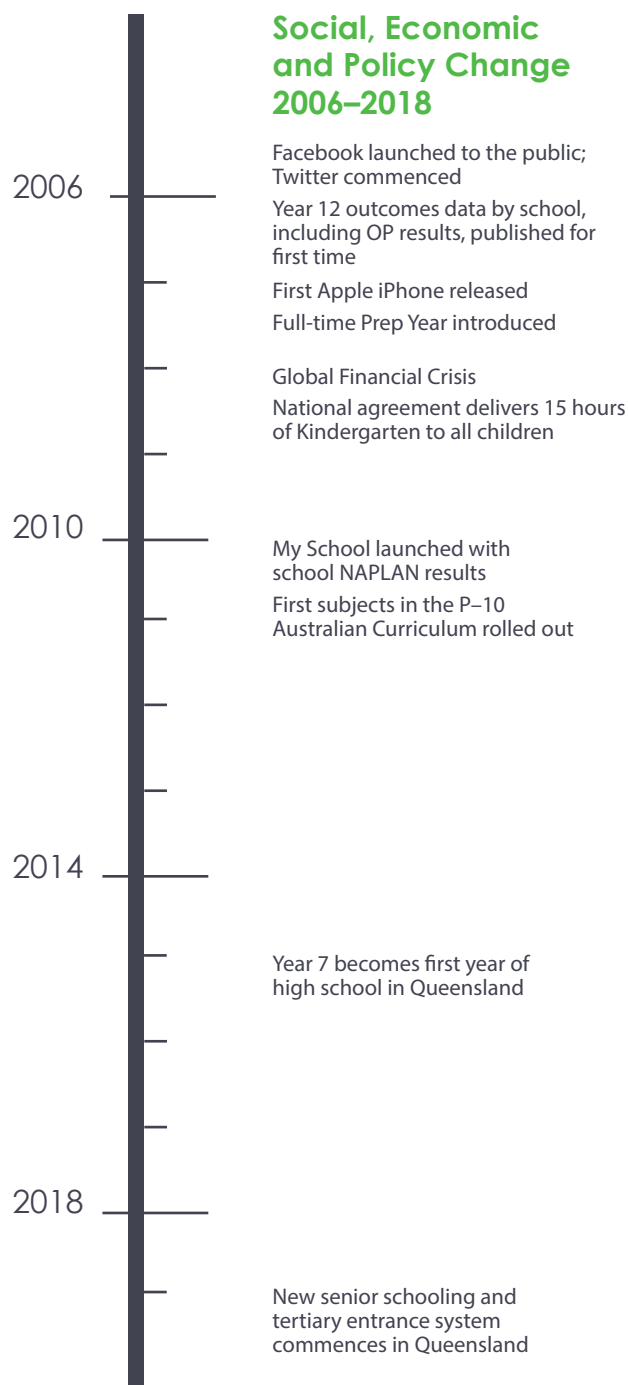
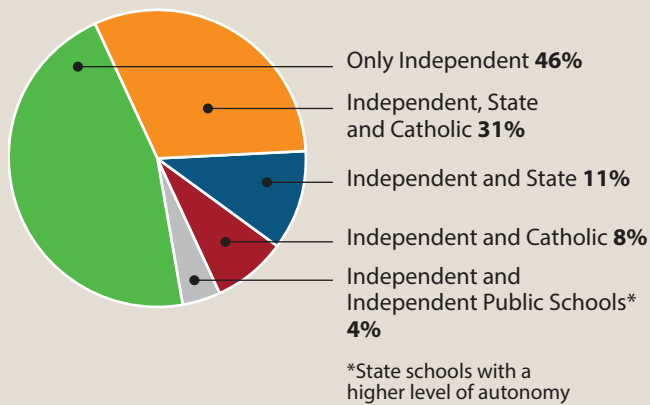
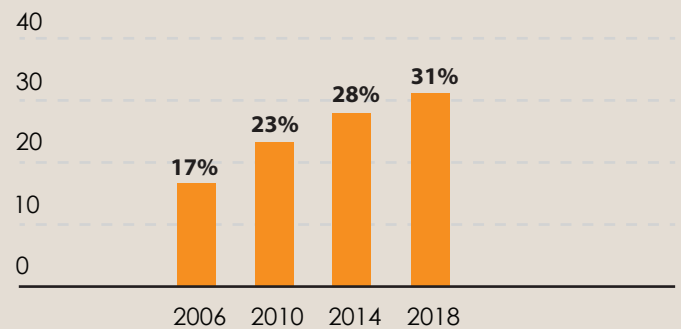


FIGURE 1: Distribution of Considered Sectors



Consideration by Parents of All Three Schooling Sectors in Survey Years



Key Findings

Schooling Options

School choice is important to Queensland families as evidenced by the numbers of children educated in the independent, state and Catholic schooling sectors.

Parents are savvy education consumers who have online access to more comparative local school information than ever before.

According to the 2018 *What Parents Want Survey*, while the largest proportion of parents (46%) had their sights firmly set on an independent school for their child, almost one third of parents (31%) weighed up schools in all three sectors (refer Figure 1).

Parents of new Prep students (38%) and new Year 7 students (36%) – the main transition and school intake years – were more likely to consider all three schooling sectors than parents overall (31%).

Parents who moved their children to new independent schools for Years 8-12 were more likely than any other parents of new students to only consider independent schools (50%).

The majority of parents (54%) with children in boarding schools also only considered independent schools.

Parents are more likely today, than 12 years ago, to explore all available schooling options before making an informed decision about their child's future.

Despite this increased level of competition in the early decision-making stage, independent schools continue to be the school of choice for families of almost 15 percent of all Queensland school children, and 20 percent of families with children in secondary school.

Enrolments in the sector have increased by more than 25,000 students over the 12 years since the first *What Parents Want Survey* in 2006. In the past six years alone, 27 new independent schools have opened in Queensland, 11 of which are Special or Special Assistance Schools.

Moving schools

Each year some families move their children to different schools for various reasons.

The majority (55%) of new students in Years 1-12 who transferred to an independent school in 2018 had previously attended a state school – the two main other school sources were independent (26%) and Catholic (17%).

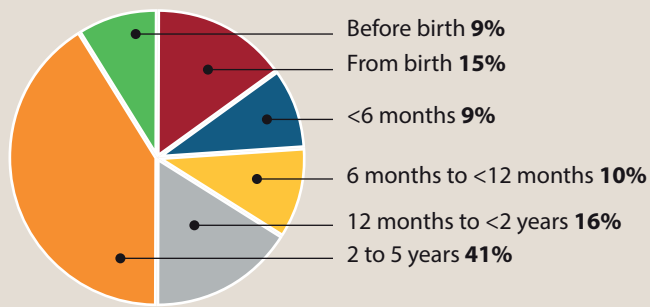
In the important Year 7 intake year, this figure is higher. Two-thirds (66%) of new students who commenced high school at an independent school in 2018 had previously attended a state school. The majority of these parents (59%) said they had no choice but to move schools because secondary education was not offered.

Parents with children in different year levels identified different reasons for changing schools.

The most common reason parents of new students in Years 1-6 gave was that "a better level of education was available elsewhere" (37%).

For parents of new students in Years 8-12 the dominant reason was that their child was "unhappy" (44%).

FIGURE 2: School Selection Process Timeframe



A good school to us is one that has a good community feel and that allows for staff, parents and students to meet and connect, and form part of a team to help educate our children and [support] them through their school years.

PARENT RESPONSE ID 523

Siblings

Parents' satisfaction with the independent sector is reflected by survey findings showing 87% of parents with more than one school-aged child also sent these children to independent schools (refer Figure 3).

A similar proportion of parents with children not yet in school (85%) also intended sending their sons or daughters to independent schools (refer Figure 4).

Decision Timeframe

School selection can be top of mind for some parents even before they have had children, while others, depending on their personal circumstances or the schooling choices available, spend less time researching options.

Parents were asked when they first started thinking about schools for their child. The survey found the majority of parents (65%) started thinking about school choice at least two years before their child commenced school. The same proportion of parents (65%) also indicated they planned ahead to pay school fees.

The 2018 survey found 24% of parents started considering schools well in advance, before or from their child's birth (refer Figure 2) – a similar proportion as in 2006.

Parents of children in Prep are more likely to consider schools before or from their child's birth.

Parents of new Year 7 students were far more likely to start their decision-making process within 1-2 years of the child starting high school – 23% compared with the survey average of 16%.

FIGURE 3: Schooling Sectors – Parents With More Than One School-aged Child

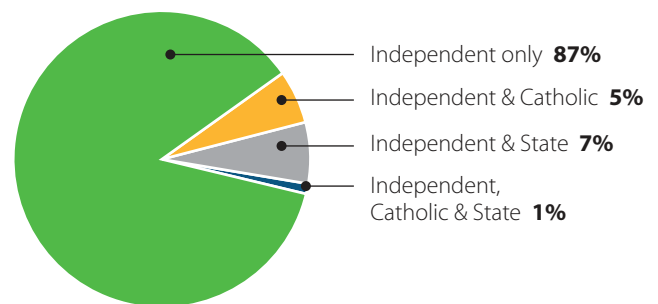


FIGURE 4: Destination of Siblings – Parents With Children Under School-age

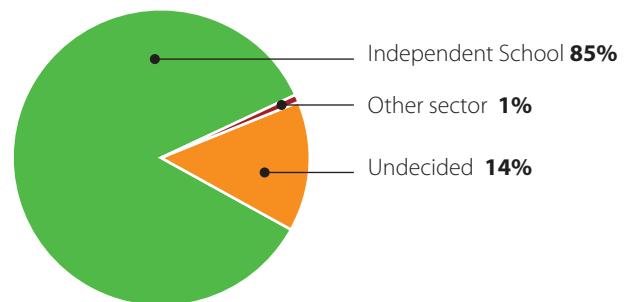
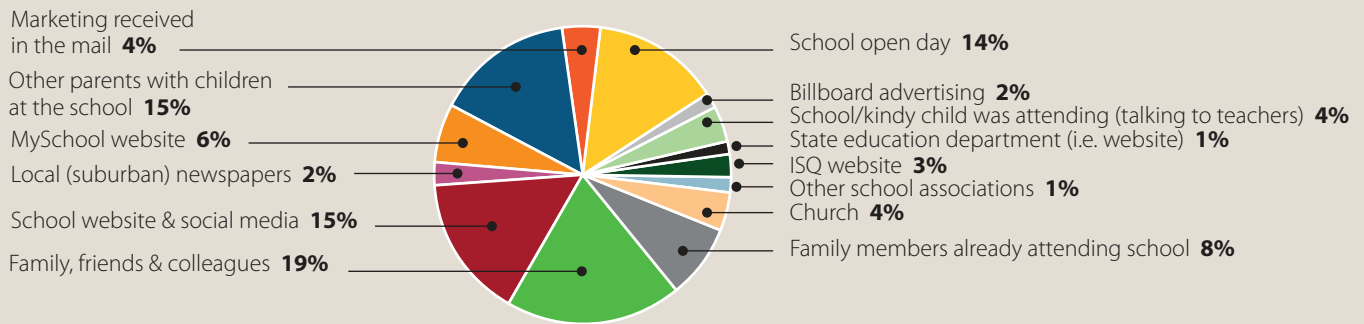


FIGURE 5: Parent Sources of Information



Parent Sources of Information

Parents were asked to identify the range of sources, including both people and places, they rely on to research their school choices (refer Figure 5).

Parents most frequently cited “family, friends and colleagues” for information. This group has been the top trusted source in all four parent surveys since 2006.

When parents were asked to short-list their top three most influential information sources, the following made the top five:

- Family, friends and colleagues (67%)
- Other parents with children at the school (54%)
- School open days (47%)
- School website and social media (40%)
- Family members already attending the school (24%)

Almost 1 in 5 parents (18%) also identified My School as one of their top three sources of information. Parents of primary school-aged children were more likely to refer to the website as part of their decision-making process.

Usefulness of school-provided information

Schools use a range of communication-related tools and platforms to promote their school’s education offerings and points of difference to prospective parents.

Parents were asked to rate how useful these sources of information were by rating them on a five-point Likert scale with a score of 5 being the highest rating.

The survey found parents put a high value on their face-to-face contact with schools and their staff, with one-on-one school visits the most useful (refer Figure 6).

The majority of parents access a range of information through a variety of channels to make their decision:

- 89% visited school websites, with 64% visiting three or more
- 84% attended a school visit by appointment, with 85% of these parents attending one or two school tours
- 83% read school publications such as school prospectuses and brochures
- 74% attended school open days, with 78% of these parents attending one or two schools.

FIGURE 6: Usefulness of School Marketing, All Responses

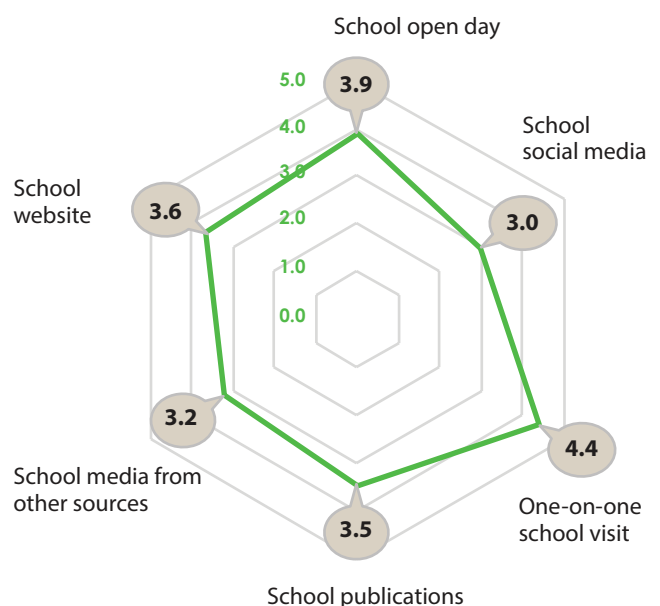
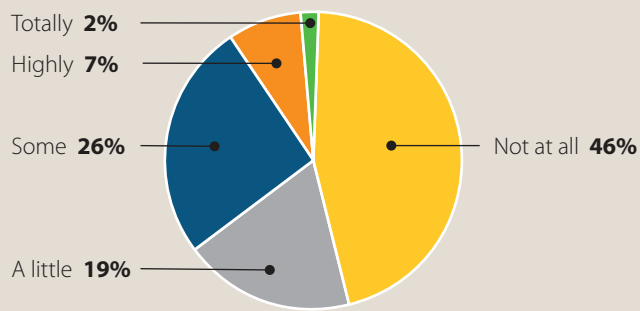


FIGURE 7: Influence of Social Media (Non-school)



The ability to cater for special needs with small class sizes was most important for our son.

PARENT RESPONSE ID 87

We like that they have successfully combined Christian faith and principles with academic and cultural excellence.

PARENT RESPONSE ID 133

SOCIAL MEDIA

For the first time in the *What Parents Want Survey* series, parents were asked about the influence of both school-generated and externally generated social media in their decision-making process.

Externally generated social media

Almost half (46%) of parents indicated they were not influenced at all by externally generated social media about schools. However, 10% indicated they were “totally” or “highly” influenced and 45% were “a little” or “somewhat” influenced. Not surprisingly a higher proportion of Gen Y parents (14%) were totally or highly influenced, while the reverse was true for Baby Boomer parents (6%) (refer Figure 7).

School-generated social media

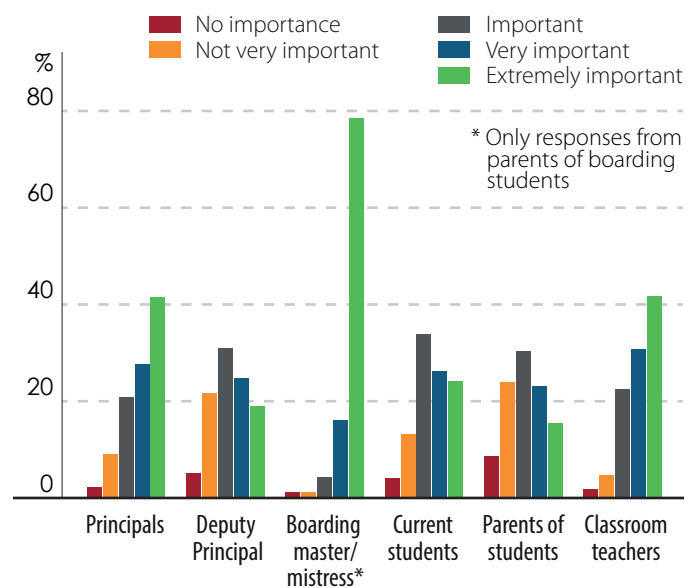
Schools use a range of social media platforms such as Facebook, Twitter and Instagram to promote their schools and to share news with their school communities.

While parents rated the influence of school-generated social media behind all other forms of traditional school communications, such as websites and publications, a significant proportion of parents rely on it.

One third of all parents indicated that it was “very useful or extremely useful”.

Analysis of different parent groups revealed Gen Y parents born from 1986 onwards (41%) and Boarding parents (45%) were more likely to find school-generated social media as “very to extremely useful”.

FIGURE 8: Distribution of Importance of Meeting School Representatives



Meeting School Representatives

Personal contact with future members of a school community is important to parents. According to the survey, independent school parents most value meeting classroom teachers and the principal.

For parents of boarding students, the boarding master or mistress is the staff member they most want to meet, with 78% of these parents rating this contact as “extremely important” (refer Figure 8).

FIGURE 9: Degree of Influence of School Facilities

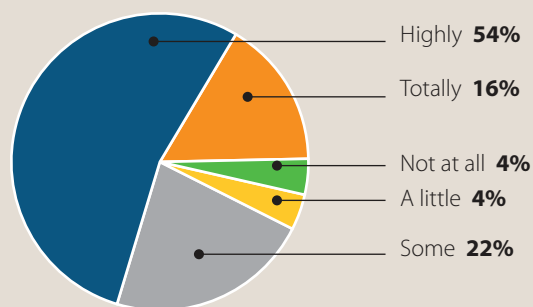
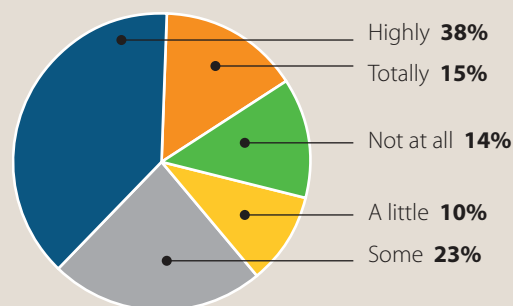


FIGURE 10: Influence of Child's Opinion



School Facilities

A school's physical environment often plays an important role in a parent's first impressions of a school. Independent schools invest significant time and money into upgrading and maintaining their facilities as part of their commitment to delivering a high quality, holistic and contemporary education.

Parents with children in Queensland independent schools contribute on average 75% of the funds for independent school facilities.

According to the survey, 70% of parents say their choice of school was totally or highly influenced by the look of the school and facilities on offer (refer Figure 9).

Child's Opinion

Many parents don't make decisions about their child's schooling on their own. Often children have a say in their future school.

According to the survey findings, 53% of parents said their selection of school was "totally or highly" influenced by their child's opinion (refer Figure 10).

Parents of boarding students were more likely to be influenced by their child's opinion with 75% of these families "totally or highly influenced".

Not surprisingly children appear to exert a greater influence as they progress through school – 45% of parents of primary aged-students were "totally or highly influenced" compared with 60% of parents of secondary-aged students.

The Final Decision

When it comes to the final decision on school selection, parents are influenced by a multitude of factors, including less tangible reasons related to the environment they believe is the best fit for their child or will bring out their best.

Top influencing factors

In the survey parents were asked to identify the extent to which 43 factors, categorised by school type, curriculum programs, school characteristics, services and people, contributed to their decision. This was done on a five-point Likert scale with a score of 1 being of "no importance" and 5 being "totally important".

Based on an analysis of these results the top 10 most important factors driving school decisions by independent school parents in 2018 are listed, in order (ranked 1-10), to the right.

These factors have remained relatively constant over the past 12 years, although their rankings have changed over time, with other factors making the top 10 in previous years.



The most significant source for us was hours online researching different schools, educational philosophies and parent forums.

PARENT RESPONSE ID 2154

IN SUMMARY

Ten Most Important Factors (2006-2018), by Ranking

FACTOR	2006	2010	2014	2018
Preparation for student to fulfil potential in later life	1	1	1	1
The high quality of teachers	n/a	4	3	2
School seemed right for child's individual needs	5	7	6	3
Good discipline	2	2	2	4
Teaching methods/philosophy	4	5	5	5
Encouragement of responsible attitude to school work	3	3	4	6
Reputation of school	7	6	8	7
Emphasis placed by school on developing student's sense of community responsibility	6	8	7	8
Range of subjects offered			10	9
Strong academic performance	9	9	9	
Prospects for school leavers		10		
Small class size	8			
Appearance/behaviour of existing students	10			
Size of school				10

Applying For Enrolment

The final school a child attends may ultimately come down to whether there is a place available. Many independent schools operate waiting lists to manage enrolment interest from families.

According to the survey 74% of parents put their child's name on a waiting list. Of these families 55% only put their child's name down at the independent school they subsequently enrolled in (refer Figure 11).

FIGURE 11: Students Registered on a Waiting List, by School Waiting List Registrations

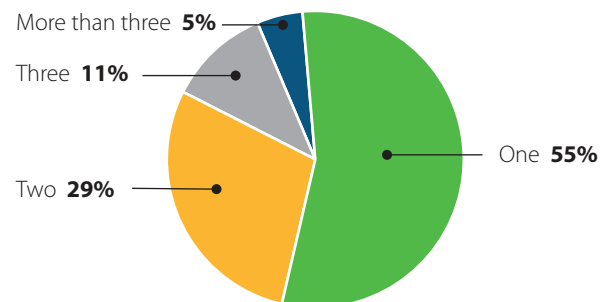


FIGURE 12: School Fee Payment Strategies

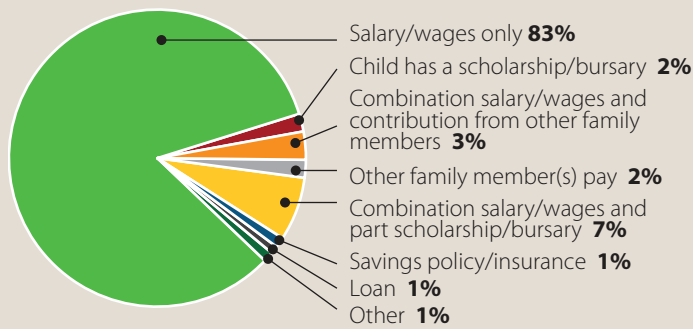
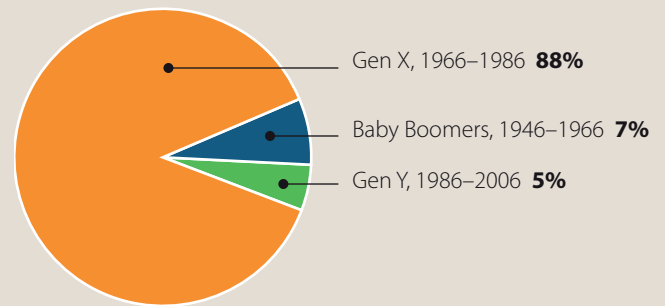


FIGURE 13: Parent Generation



Paying fees

Queensland independent schools serve families from all income levels.

Almost 4 in 10 respondents (38%) indicated they had weekly gross household income levels in the three lowest income brackets (less than \$2,000). Income levels were based on Queensland income deciles evidenced in the 2016 Census of Population and Housing.

Queensland independent schools that charge tuition fees* recognise the financial commitment their parent communities make in their child's education from their after-tax incomes.

Parents often make significant financial sacrifices in other areas of their lives to send their child to an independent school.

The overwhelming majority of parents (93%) rely on their salaries, either wholly, or in combination with other sources such as part scholarship/bursary, or other family members, to meet schooling costs (refer Figure 12).

* Special Assistance Schools serving at-risk and disengaged young people do not charge tuition fees. Special Assistance Schools are the fastest growing school type in the independent sector rising to 20 schools in 2019.

Young Generation Y Parents

For the first time *What Parents Want* analysed parent responses based on three 20-year generational periods that broadly reflected parents from the Baby Boomer and X and Y generations (refer Figure 13).

While Generation Xers made up the majority of all parents across all sectors, young Generation Y parents born after 1986 represented almost 1 in 5 (18%) of the Prep parents who responded to the survey.

This upcoming generation of parents, aged in their early 30s and younger, approaches school choice a little differently.

In comparison to Baby Boomer and Generation X parents born before 1986, young Generation Y parents are:

- more likely to consider all three schooling sectors
- less likely to have started thinking about schools for their child from birth or before, but just as likely as Generation X parents to spend more than two years considering schooling options
- More likely to rely on "friends, family and colleagues" as influential sources of information
- More likely to be heavily influenced by a school's external appearance and facilities
- More likely to rate school-generated social media as very or extremely useful
- More likely to attend only one school open day
- More likely to have their child's name on only one school waiting list.
- More likely to have planned ahead for school fees



The International Baccalaureate suits the learning style of our children. The progressive approach to education and a true investment in each individual child is what makes this a fabulous school.

PARENT RESPONSE ID 1212

Participating Member Schools

- | | | | |
|--|---|---|--|
| <p>A B Paterson College
 Aboriginal and Islander Independent Community School
 All Saints Anglican School
 All Souls St Gabriels School
 Ananda Marga River School
 Anglican Church Grammar School
 Annandale Christian College
 Arcadia College
 Arethusia College
 Australian Christian College – Moreton
 Australian Industry Trade College – Redlands
 Australian International Islamic College
 Australian Technology and Agricultural College
 Autism Queensland Education and Therapy Centre
 Bayside Christian College Hervey Bay
 Biral Steiner School
 Blackall Range Independent School
 Brisbane Boys' College
 Brisbane Christian College
 Brisbane Girls Grammar School
 Brisbane Grammar School
 Brisbane Independent School
 Brisbane Montessori School
 Bundaberg Christian College</p> | <p>Burdekin Christian College
 Caboolture Montessori School
 Caloundra Christian College
 Caloundra City Private School
 Calvary Christian College
 Calvary Christian College – Townsville
 Cannon Hill Anglican College
 Carinity Education – Glendyne
 Carmichael College
 Chinchilla Christian College
 Christian Outreach College
 Clayfield College
 Concordia Lutheran College
 Cooloola Christian College
 Coolum Beach Christian College
 Discovery Christian College
 Emerald Christian College
 Emmanuel College
 Fairholme College
 Faith Lutheran College – Plainland
 Glasshouse Christian College
 Glenvale Christian School
 Good News Lutheran School
 Good Shepherd Christian School
 Good Shepherd Lutheran College
 Goora Gan Steiner School
 Grace Lutheran College
 Grace Lutheran Primary School
 Groves Christian College
 Heights College
 Hillbrook Anglican School
 Immanuel Lutheran College</p> | <p>Ipswich Girls' Grammar School
 Ipswich Grammar School
 Kimberley College
 Lighthouse Christian School
 Living Faith Lutheran Primary School
 Lourdes Hill College
 Mackay Christian College
 Montessori International College
 Montessori Noosa
 Moreton Bay Boys College
 Moreton Bay College
 Mueller College
 Ormiston College
 Pacific Lutheran College
 Parklands Christian College
 Peregian Beach Community College
 Prince of Peace Lutheran College
 Redeemer Lutheran College – Rochedale
 Redlands College
 Redwood College
 Rivermount College
 Riverside Christian College
 Samford Valley Steiner School
 Sheldon College
 Somerset College
 Somerville House
 St Aidan's Anglican Girls' School
 St Andrew's Anglican College
 St Andrew's Lutheran College
 St Luke's Anglican School
 St Margaret's Anglican Girls School</p> | <p>St Michael's College
 St Patrick's College Townsville
 St Paul's Lutheran Primary School
 St Paul's School
 St Peters Lutheran College
 St Peters Lutheran College – Springfield
 St Ursula's College (Toowoomba)
 Staines Memorial College
 Stuartholme School
 Suncoast Christian College
 Sunshine Coast Grammar School
 Tec-NQ
 The Glennie School
 The Lakes College
 The SCOTS PGC College
 The Southport School
 The Spot Academy
 The Springfield Anglican College
 Toowoomba Christian College
 Toowoomba Grammar School
 Townsville Christian College
 Townsville Grammar School
 Trinity Anglican School
 Trinity College
 Trinity Lutheran College
 West Moreton Anglican College
 Westside Christian College
 Whitsunday Anglican School</p> |
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FEBRUARY 2019



**Independent Schools
Queensland**

choice & diversity

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