2026 ANNUAL REPORT

The State of Private Education in America

A flagship annual review of independent, religious, boarding, Montessori, and special-education schools — enrollment, the school-choice effect, admissions, tuition, AI, faculty, and the road to 2030.

K12 Academics — helping families Find Your Community! since 2004

4.7M
Private K-12 students (~10% of K-12)

~29k
Private schools nationwide

30+DC
States with private-choice programs

$15k
Average tuition, 2025-26

EXECUTIVE SUMMARY

Stable in size — and in motion everywhere else

The private sector still educates about one in ten American students, and that share has held steady. Beneath the headline, the field is being reorganized by public choice dollars, shifting affiliation, rising tuition, an international rebound, and AI — creating both pressure and opportunity.

4.7M
Private K-12 students

30+DC
Choice-program states

$15k
Avg tuition 2025-26

77%
Religiously affiliated

↗ Biggest trends

- School-choice/ESA dollars are now a primary demand driver.
- Enrollment steady overall but reshuffling — Catholic down, secular up.
- Boarding bifurcating: domestic decline, international rebound.
- AI arrived ahead of the policies to govern it.

✓ Key findings

- ~4.7M students in ~29,000 schools — about 10% of U.S. K-12.
- 30 states + DC run choice programs; 1M+ students participate.
- Day tuition rose ~7.4% in a year — sharpest in a decade.
- ~1 in 4 independent-school students receive need-based aid.

! Major challenges

- Affordability — average ~$15k, NAIS day schools ~$33k.
- Faculty recruitment tightening; ~40% report a worse season.
- Demographic headwinds shrinking the school-age pool.
- AI, cybersecurity & data-privacy policy gaps.

★ Opportunities

- Choice funding widens the addressable market.
- Distinctive programs win on fit — STEM, faith, special-needs.
- Strong digital presence converts searchers to applicants.
- International recruitment is a real growth lane.

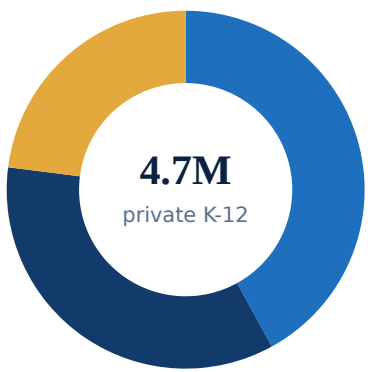
SECTION 01 — THE PRIVATE EDUCATION LANDSCAPE

A small, diverse & durable slice of K-12

Private education spans Catholic and other religious schools, secular independents, Montessori, boarding, college-prep, and special-education schools — about 4.7 million students across ~29,000 schools, a stable ~10% of K-12, concentrated in and around cities.

How private enrollment breaks down

By school orientation (NCES)



Other religious · 42% Catholic · 35% Nonsectarian · 23%

The sector at a glance

Scale, mix & geography

4.7M **private K-12 students** — steady 2019-22.

~29k **schools**; 44% enroll under 300.

77% attend a **religious** school; 23% secular.

80%+ sit in **urban & suburban** areas.

SECTION 02 — ENROLLMENT TRENDS

Steady totals, shifting composition

Overall enrollment is flat-to-rebounding, but the mix is changing fast: Catholic schools have ceded share for over a decade while secular independents grow, and boarding is shrinking domestically even as international demand returns. The story is redistribution, not decline.

The decade-long shift in share

Change in share, 2009 → 2021



Where the movement is

Segment dynamics

−6.2 pts — **Catholic share** fell 39.4% → 33.2% since 2009.

+2.7 pts — **nonsectarian share** rose to ~25%.

Steady — total private enrollment **held at ~4.7M**.

Rebound — most private schools **stable or growing** (Cato).

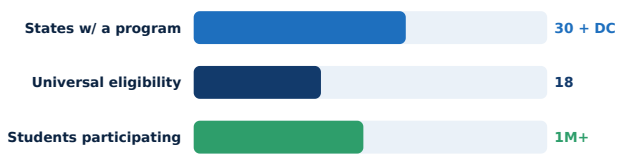
SECTION 03 — THE SCHOOL-CHOICE EFFECT

The policy shift rewriting demand

The defining external force of 2026 is public money following students to private schools. Vouchers, tax-credit scholarships, and ESAs have gone mainstream — expanding who can afford private education and changing how schools recruit and price.

How far choice has spread

Private-choice programs across the states



Why it matters

Access, pricing & recruitment

30+DC states run a **private-choice program** (Sept 2025).

18 have **near-universal eligibility**.

1M+ students used **choice funds** by end of 2024.

ESA accounts let families **assemble tuition & services**.

Families shop deliberately — and start online

Choosing a private school is now an active research process. Parents weigh safety, outcomes, culture, and fit — and overwhelmingly begin with a search engine, a directory, and a school's website. That is exactly where K12 Academics connects families to schools.

The parent decision hierarchy

How families rank what matters

1. **Safety** & wellbeing
2. **Academic excellence**
3. **Culture** & values fit
4. **College prep**
5. **Cost** & aid
6. **Arts & athletics**

How families research

The discovery journey

Search — start with **Google, directories & rankings**.

Website — **site, tours & reviews** make the shortlist.

Fit — quality = **experience, wellness & belonging**.

K12A — the **K12 Academics directory** is where families compare.

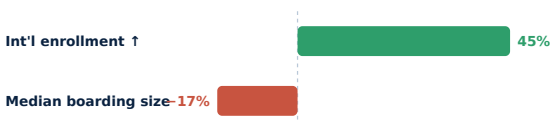
SECTION 05 — ADMISSIONS & ENROLLMENT

Recruitment is a marketing discipline now

With demographic headwinds and rising competition, admissions has become full-funnel enrollment management. International recruitment, long volatile, is rebounding at boarding schools even as visa policy stays uncertain.

Boarding's split screen

Domestic decline vs. international rebound



The enrollment funnel

Inquiry to re-enrollment

Digital — **SEO, social & content** drive inquiry & yield.

45% of NAIS **boarding schools** saw int\'l gains in 2024-25.

91% of prospective **int\'l students** still intend to study in the U.S.

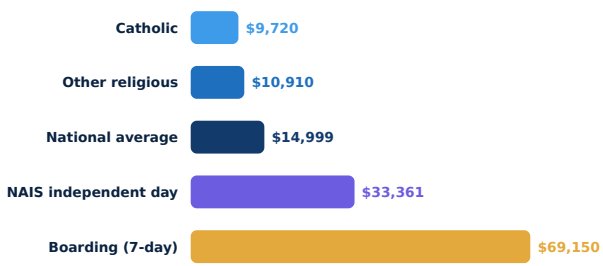
Retain — **re-enrollment** is as valuable as new admits.

Prices are rising — and so are aid budgets

Tuition posted some of its sharpest increases in a decade, driven by faculty pay and expanded services. Sticker prices hide enormous range — from ~$9,700 at Catholic schools to $69,000+ at boarding — and most independent schools recycle a large share of tuition into aid.

Tuition varies enormously by type

Average annual tuition, most recent



Affordability & aid

What families actually pay

+7.4% day tuition rose in a year — **sharpest in a decade**.

1 in 4 independent students **get need-based aid**; boarding ~1 in 3.

$20.9k **median aid grant** at day schools; ~$33k boarding.

ESA **choice funds** increasingly offset tuition.

AI arrived before the rulebook did

Independent schools are moving quickly on generative AI, personalized learning, and STEM — often ahead of policy. NAIS research finds real experimentation alongside a shared need for clearer policies, faculty training, and integrity guardrails.

Where innovation is landing

AI, STEM & personalization

AI piloting **AI tutoring, feedback & admissions tools** ahead of policy.

Policy a shared gap in **AI policy, training & integrity**.

STEM **robotics, CS & research** anchor differentiation.

Adaptive **personalized pathways & analytics** tailor pace.

The innovation stack

Fast-growing focus areas

- **AI-assisted learning**
- **Integrity policy**
- **Robotics**
- **Computer science**
- **Research**
- **Personalized paths**
- **Analytics**
- **Maker & design**

Schools that pair innovation with **clear policy & training** turn it into an admissions advantage.

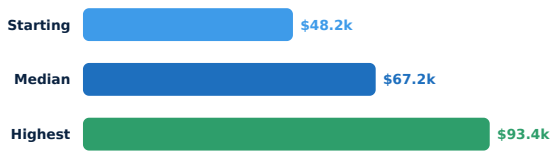
SECTION 08 — FACULTY & WORKFORCE

The people model is the business model

Roughly two-thirds of an independent school's budget goes to people, and compensation is the sector's central tension. Teachers often trade pay for smaller classes and autonomy — but real wages have slipped and recruitment has tightened, making retention strategic.

Independent-school teacher pay

NAIS salary range (2022-23)



The workforce squeeze

Pay, pipeline & retention

$67.2k — **median NAIS salary**; start ~$48k, top ~$93k.

~40% — of schools reported a **worse recruitment season**.

−25% — teacher pay **lags comparable professions** (EPI).

Culture — small classes, autonomy & mission are the **retention levers**.

Wellbeing, digital presence & the story schools tell

Families increasingly evaluate schools on student experience and belonging, and they judge all of it through a school's digital presence. Wellness programming, a phone-free movement, and a compelling online story are now core to both education and enrollment.

Experience & wellbeing

What families weigh

Wellness **mental-health & counseling** are a top differentiator.

Belonging **community & inclusion** shape re-enrollment.

Phone-free a growing share go **phone-free** for focus.

Life **arts, athletics & leadership** round out experience.

Digital presence & branding

Where schools compete for attention

- **Website**
- **SEO & search**
- **Reputation**
- **Instagram**
- **TikTok**
- **YouTube**
- **LinkedIn**
- **Directories**

Schools win by telling a clear story of **mission, outcomes & experience** — and by being **found** where families search.

SECTION 10 — MARKET SEGMENTS

Five (plus one) markets under one label

“Private school” is not one market. Independent prep, faith-based, boarding, Montessori, special-needs, and international schools each have their own economics, families, and growth path — and each is best matched to families through targeted discovery.

◆

Independent / prep

Secular, nonprofit, board-governed — the fastest-growing share, competing on academics & outcomes.

✝

Faith-based

Catholic & other religious — mission-driven; Catholic share declining, other-religious holding.

⌂

Boarding

Residential education bifurcating — domestic softening, international rebounding.

✿

Montessori / alt

Child-led pedagogy; a durable niche with loyal families & strong early-childhood demand.

♥

Special-needs

Specialized support & accessibility — often the deciding factor for a family.

✈

International

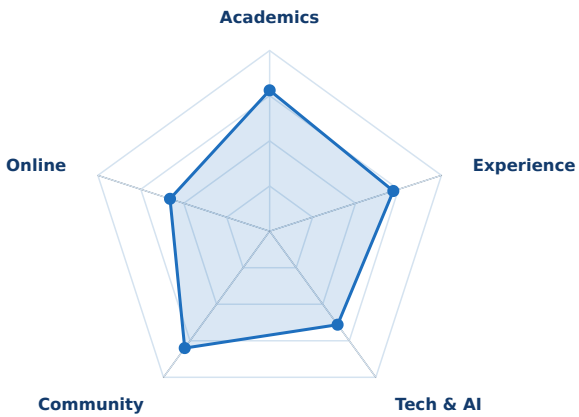
Global-curriculum schools connecting families across borders; key to U.S. recruitment.

A K12 Academics framework for evaluating a school

Rankings obsess over selectivity and test scores. The Index reframes quality around what families actually experience — five weighted pillars so parents can compare on fit, not prestige.

Five-pillar profile

Illustrative — weights sum to 100



Academic Innovation 25%

STEM, research, advanced & personalized programs.

Student Experience 20%

Arts, athletics, leadership & wellbeing.

Technology & AI 20%

AI adoption, digital learning & sound policy.

Community & Engagement 15%

Belonging, inclusion & parent communication.

Online Presence 20%

Website quality, transparency & discoverability.

SECTION 12 — THE FUTURE (2030 OUTLOOK)

Two forces, and a to-do list

Toward 2030, private education gets more personalized, technology-driven, career-focused, and global — while demographics and cost press on the model. The winners will pair a distinctive program with disciplined enrollment marketing and a clear digital front door.

↑ Tailwinds

School-choice funding widening the market.

AI & personalized learning as a differentiator.

International rebound for well-positioned schools.

Emerging models — microschools & specialized academies.

↓ Headwinds

Demographic decline shrinking the pool.

Affordability ceilings as tuition outpaces incomes.

Faculty recruitment & retention pressure.

Policy gaps on AI, privacy & cybersecurity.

For school leaders

- Sharpen enrollment & digital presence
- Invest in tech, AI policy & training
- Demonstrate outcomes, not just prestige

For families

- Evaluate on fit & experience
- Use choice funds & aid to widen options
- Start discovery in trusted directories

For education companies

- Help schools be discoverable
- Support innovation with measurable outcomes
- Meet privacy & security expectations

DATA & METHODOLOGY

Methodology & sources

This report synthesizes the most recent publicly available data from federal sources, associations, and sector research, current as of publication in 2026.

Data sources

- NCES — Private School Universe Survey
- NCES — Condition of Education
- NAIS — DASL & State of the Sector
- NAIS — Generative AI survey
- Pew Research Center
- EdChoice — choice programs
- Private / Boarding School Review
- S&P Global — tuition trends
- Bureau of Labor Statistics / EPI
- K12 Academics directory analytics

Figures reflect the most recent data available at publication in 2026. Federal private-school data can lag a cycle; percentages rounded; definitions vary by source.

Contact K12 Academics

Questions about this report, or about listing your school? We\'d love to hear from you.

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