

CHOOSE TO LEARN

2025

K-12'S AGE OF EXPERIMENTATION
HOW PARENTS ARE REWRITING
THE FUTURE OF K-12 EDUCATION

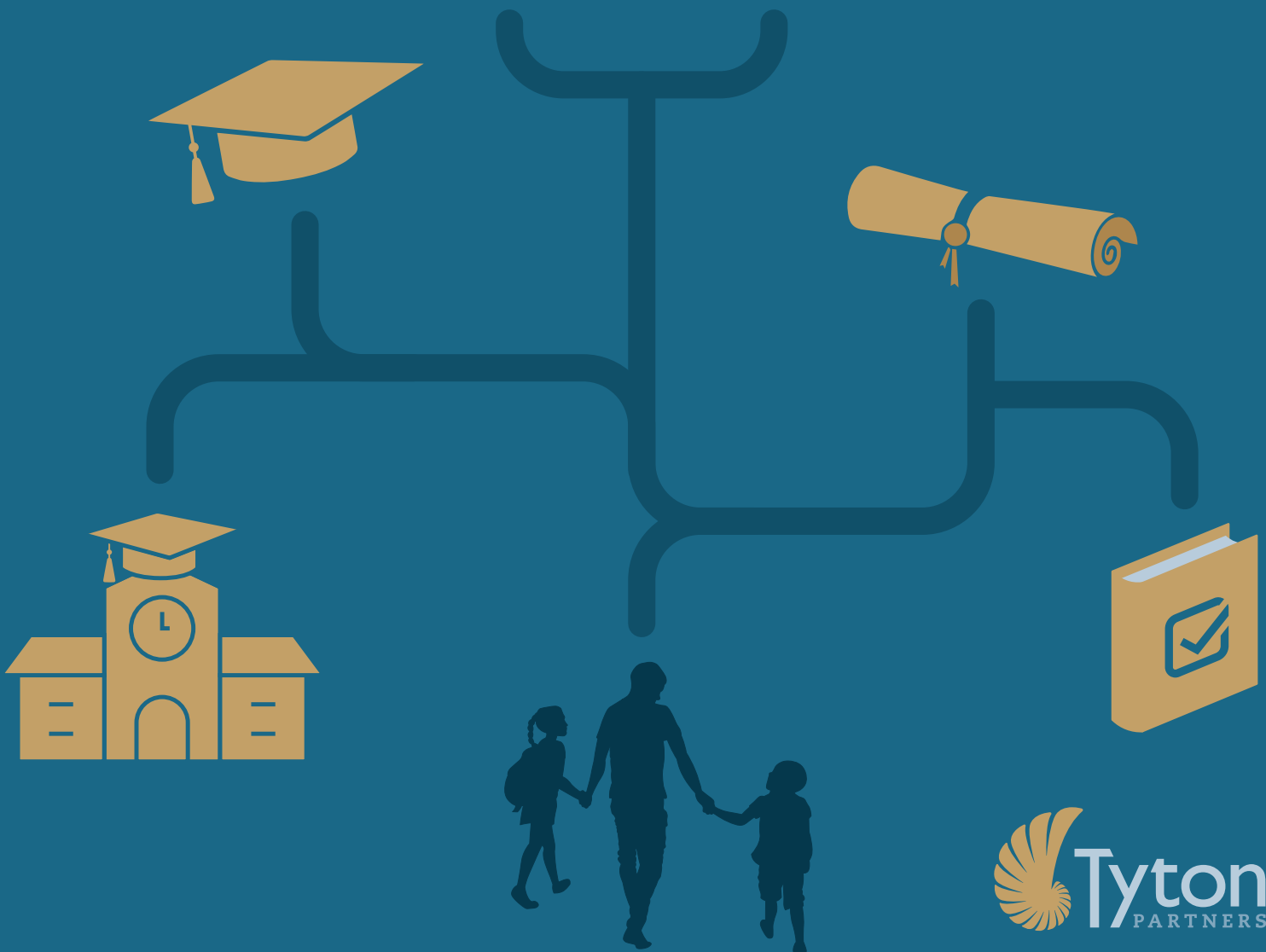


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CONTEXT AND OVERVIEW

A new era in K-12 education is emerging, driven by more sophisticated parent demand, accelerating school model innovation, and significant policy momentum enabling parental choice options. These forces have sparked widespread experimentation among K-12 families, consequently pushing public school districts and independent providers to adapt, some with more success than others.

Parent demand is a driving force behind systemic enrollment shifts. During the pandemic, urgency drove enrollment choices—fit was a secondary consideration, if one at all. Now, parents are revealing a greater degree of intentionality in school transitions for their children, willing to explore various options until they find the right fit.

In response, the K-12 “school” landscape is experiencing considerable innovation and shifting quickly in some states and regions. Homeschooling and virtual schools are surging as parents prioritize safety and visibility. Place-based models, like microschools and faith-based private schools, are expanding to fill the gap for some, providing families with an academic and cultural environment that, in some cases, is more aligned with their values.

Further fueling school choice are state and federal policy initiatives for K-12 innovations and investments. In 2024, many states launched or expanded their Education Savings Account (ESA) programs, increasing access to public education funds for more families, representing more than 20 million US K-12 students. Alabama, Georgia, Louisiana, and Wyoming all launched programs in 2024, while Missouri, North Carolina, and Pennsylvania expanded eligibility of existing programs. Nearly 1.1 million students currently participate in some form of ESA, voucher, or scholarship program, up from ~300K in 2014.¹ As more states pass ESA legislation in 2025, participation will undeniably accelerate—look no further than Texas’s ESA program passed in April, which provides families access to \$1 billion of state K-12 funding, up to \$10,000 per family.²

At the federal level, a federal tax credit bill supporting private school scholarships is pending on the House floor as of April 2025.³ Concurrently, the Department of Education seeks to grant states the flexibility to expand their school choice programs, and an executive order signed in January 2025 will evaluate how federal funds previously earmarked for local districts can be used to support school choice initiatives.⁴

Considering these initiatives, among others, makes Choose to Learn 2025 a critical lens into how and why a new era in K-12 education is upon us. This year’s report builds on our prior analyses, offering new insights on K-12 market dynamics through an exploration of **“Activated” parent**⁵ demand—those with children in **alternative schools**⁶ driving shifts in the education landscape.

1. The 2025 ABCs of School Choice (<https://www.edchoice.org/the-2025-abcs-of-school-choice-is-available-now/>)

2. The Texas Tribune (<https://www.texastribune.org/2025/04/17/texas-house-school-vouchers-public-education-funding/>)

3. Education Week (<https://www.edweek.org/policy-politics/what-a-national-school-choice-program-under-president-trump-might-look-like/2024/11>)

4. <https://www.whitehouse.gov/presidential-actions/2025/01/expanding-educational-freedom-and-opportunity-for-families/>

5. *Activated parents* are those who have at least one child enrolled in a non-district school; *Open-minded* parents, as defined in *Choose to Learn 2022 and 2024*, are parents whose children are enrolled in their local school district, but who are interested in exploring different schooling options

6. *Alternative school* refers to any K-12 school operated independently from a local school district; these may be publicly funded (e.g., charter schools) but are often privately funded, and can occur in any setting (e.g., in-home or on-site at a school location)

In this context, Choose to Learn 2025 aims to answer the following questions:

- What motivates K-12 parents to pursue new educational options?
- How do parents make trade-offs? Which school models and attributes do they prioritize?
- What gaps and challenges persist between supply and demand?

This report is informed by an extensive body of research that includes:

- **Parent survey** › Quantitative primary research survey of ~1,600 Activated parents
- **Parent focus groups** › Qualitative insights from focus groups with Open-minded and Activated parents
- **Secondary research** › Review of publicly-available data on enrollment, funding policies, school safety trends, and alternative school model landscape (e.g., independent school marketing materials)
- **External interviews** › Dozens of interviews with K-12 researchers, education providers, and leaders of Navigator organizations

SUMMARY OF KEY FINDINGS

Activated parents' reasons for leaving traditional public schools reveal the need to provide families with a greater diversity of learning experiences, both within and outside of our public K-12 system. These parents represent the tip of the spear when it comes to popular narratives around "school choice," and insights into their decision-making reveal trends that will continue to shape this dynamic era of the K-12 educational landscape. Undeniably, greater awareness and action are required to ensure that all families can make informed decisions that best meet their child's needs.

1. Parents' desire for safer, more purposeful education drives ongoing experimentation in K-12.

- **Alternative schools maintain broad appeal:** Consistent with 2022, more than 20% of families surveyed in 2024 have at least one child enrolled outside of their local district, representing more than 11 million students.
- **Demand is driven by "push" and "pull" factors, including deepening concern for children's well-being and a desire to spark an inspiration for learning:** For Activated parents, school safety is a top priority when making enrollment decisions (39%), followed by a desire for better curriculum (25%) or a more positive school culture (22%).
- **Switching tends to occur when parents face a pressing concern:** While Open-minded parents report being motivated by academics, Activated parents are more likely to cite concerns about their prior school as a primary enrollment driver.
- **Parents seek exposure to real-world learning:** Enrollment decisions present several trade-offs; outside of a school's setting, which is a primary consideration, exposure to real-world, career-connected learning has the greatest influence over enrollment.

2. Existing K-12 “school” supply addresses parents’ safety concerns at scale but falls short in consistently meeting expectations for personalized and academically enriching learning pathways.

- **Anticipated turnover within alternative schools is considerable:** 40%Forty percent of Activated parents are planning to switch schools in the near term, highlighting a need to make quality educational options available and transparent to families.
- **Academic benefits are less visible—and harder to assess—than logistics:** Activated parents struggle to identify school models that foster intellectual engagement and a strong culture of learning. In contrast, providers are more effective in communicating operational attributes (e.g., format, schedule), which parents find more readily addressable.
- **Home-based models are proving durable:** Anticipated turnover is higher in place-based models (46%) than in home-based models (24%) where parents can solve for safety concerns and have greater influence over a child’s learning.

3. A rapidly evolving K-12 “school” landscape complicates decisions—parents need better tools and guidance.

- **Finding a strong match early sets the stage for better outcomes:** Parents have more choices than ever before; a growing body of evidence indicates that quality educational experiences as early as kindergarten significantly impact college attendance and earning potential.
- **Parents’ decision-support resources are limited:** Most Activated parents rely on online search platforms like Google (52%) and personal networks, including friends and family (43%), to inform educational choices; both have biases and limitations.
- **Navigators⁷ can enable more intentional decision-making:** Parents value—and benefit from—more effective decision support. An emerging landscape of Navigators is helping parents evaluate trade-offs, and the use of Navigators correlates to 2x greater adoption of funding programs such as ESAs.
- **Parent demand for Navigator services is untapped:** Our research suggests that parents value the level of decision-support offered by formal Navigator organizations—a potentially \$4 billion consumer market opportunity exists for Navigator tools and services.

As parent demand matures, families are exploring education options with greater intentionality—not just out of urgency. They are actively seeking models that better align with their values, priorities, and long-term goals. This evolving demand is fueling a broader era of experimentation across the K-12 landscape, prompting educators and innovators to rethink traditional structures and develop new models.

This shift presents both an opportunity and a responsibility for education providers and public districts: to design systems that meet this evolving demand to deliver consistent, high-quality student-centric experiences.

7. “Navigators” are organizations that support parents in discovering, planning, and successfully enrolling in a new school and/or student enrichment program. Specifically, Navigators assist families by providing information and resources to facilitate awareness and access to educational options that may best fit their needs and aspiration.

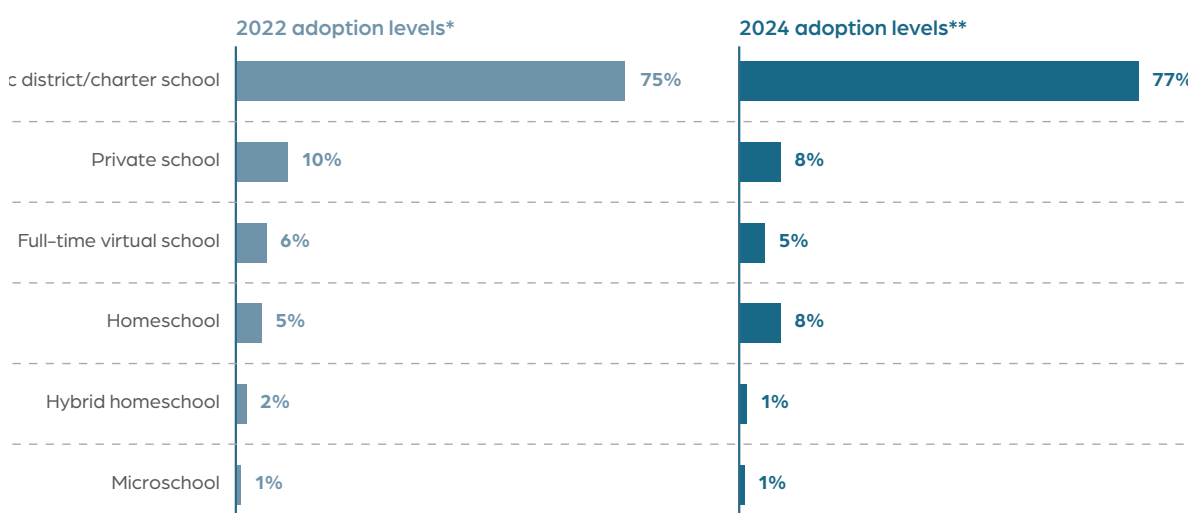
SECTION 1: MATURING PARENT DEMAND FOSTERS ONGOING EXPERIMENTATION WITH NEW SCHOOL MODELS

Student migration out of the public K-12 system is persisting and shows no signs of reversion to its prepandemic levels. Families are no longer reacting to short-term disruptions—they are in an active process of evaluating what they want from their child's education. This maturing demand is driving a sustained period of experimentation across the K-12 landscape. **Nearly one in four families surveyed (23%) now have at least one child enrolled outside of their local public school district (in alternative schools),** a trend that has held steady since the late pandemic period in 2022. This sustained migration signals a durable shift away from traditional schooling models and toward alternatives that claim stronger alignment with families' values and educational priorities.

Figure 1:

Adoption of school models over time

Comparing Choose to Learn 2022 survey-informed enrollment figures to 2024



Notes: *Survey question: "What type of school does your child attend?", n=3510; "Other, please specify" is excluded from analysis;
**"What best describes the type of school your oldest child currently attends?", n=4160

Sources: Choose to Learn Parent Survey 2022, Choose to Learn Parent Survey 2024, Tyton Partners analysis

DEPARTURE FROM PUBLIC SCHOOLS REVEALS GROWING DEMAND FOR SAFE, PURPOSE-DRIVEN LEARNING

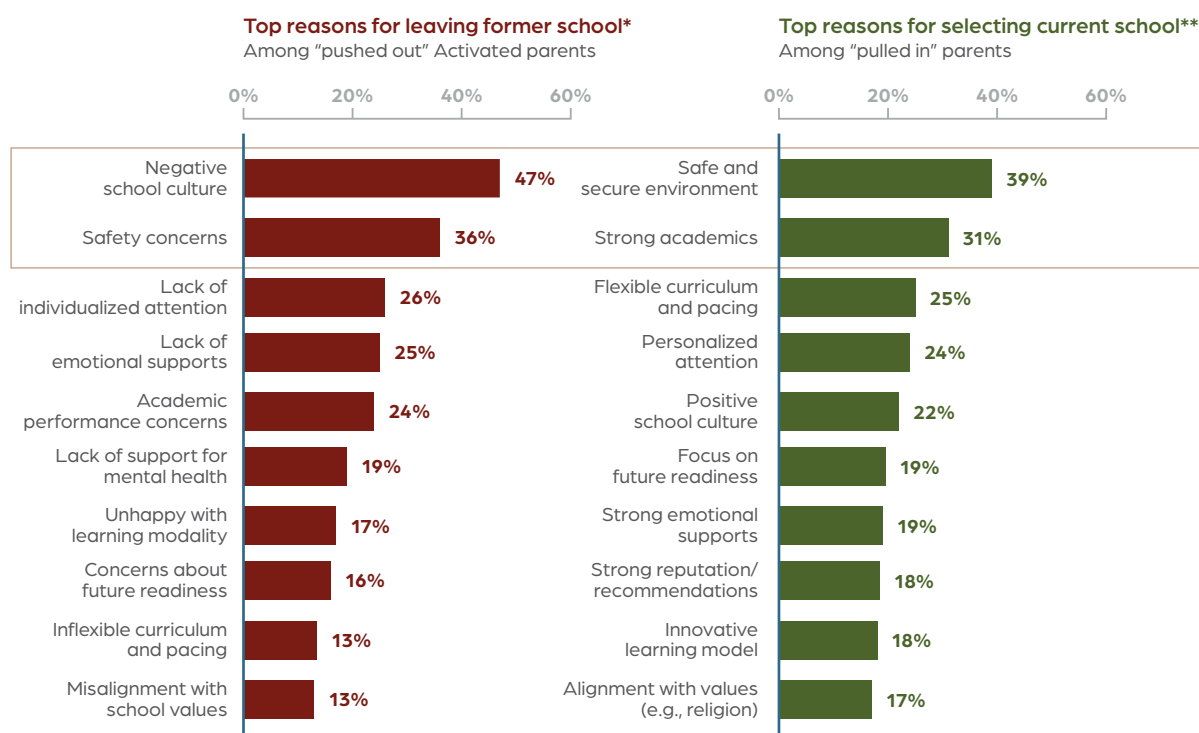
The ongoing participation in alternative schools reflects a **lack of trust in districts' ability to both keep children safe and inspire academic success**. Parents who have opted for alternative schools express a loss of confidence in their local public school's ability to deliver safe, supportive, and academically rigorous environments. In response, parents have sought models that better align with these priorities. Matriculation out of the current system stems from several factors, including the following:

- **Safety Concerns (39%):** This issue remains the top priority for Activated parents, encompassing both physical security and emotional well-being. Parents are seeking environments where children feel protected, valued, and emotionally secure.
- **High-Quality Academic Experiences (31%):** Parents are actively seeking educational experiences that prioritize high academic standards, personalized learning, and enrichment opportunities.

These factors are not only influencing parents' decisions but also shaping the urgency with which they seek new options. The acute (push) factors of safety and school culture, usually in the form of an incident or concern, are a central catalyst for parents pursuing alternative schools.

Figure 2:

Top reasons for changing schools



Notes: *Survey question: "What were the key factors that influenced your decision to leave your oldest child's previous school? Please select up to three.", n=455, Answers <10% not displayed includes "High cost or financial strain" (7%); **"What are the key factors that attracted you to your oldest child's current school? Please select up to three.", n=764, Answers <15% not displayed includes "Strong support for mental health" (14%), "Affordable cost or financial support" (13%), "Desired learning modality" (13%), "Availability of ESAs or microgrants" (5%)

Sources: Choose to Learn Parent Survey 2024, Tyton Partners interviews and analysis

SAFETY AS A PRIMARY DECISION-MAKING FACTOR

For parents, safety encompasses both physical protection and emotional well-being. Our survey reveals that even in a post-pandemic environment, safety factors remain a primary motivator for families. In turn, physical safety and emotional well-being must be addressed by education providers as table-stakes considerations.

Parents are increasingly focused on security infrastructure and protocols within school buildings. They expect strict access and safety measures, including locked doors, ID verification, visitor sign-in protocols, and emergency response plans.

“All building doors must be locked, everyone needs proper ID, and visitors must sign in.”

– Activated parent

“I need assurance that the school has effective procedures in place—not just drills, but actual emergency response plans.”

– Activated parent

Parents also define safety as an environment where their children feel emotionally secure, valued, and supported by both peers and adults. This includes having caring, approachable adults who are available to listen and respond to student concerns, as well as supportive peer relationships that reduce bullying and harassment.

“For me, safety is all about emotional wellbeing . . . ensuring my child feels valued and can attend school without any fear.”

– Open-minded parent

“When a child feels cared for, the likelihood of acting violently decreases. . . . It’s when they’re bullied or harassed that problems arise.”

– Activated parent

“Safety means having someone available for my child to talk to if they feel unsafe.”

– Open-minded parent

BEYOND SAFETY, ACADEMIC EXCELLENCE CONTINUES TO SHAPE ENROLLMENT DECISIONS

While safety is the primary driver in school decision-making (39%), academic quality and enrichment opportunities also play a significant role. Once a safe and secure environment is established, Activated parents shift their focus to the following:

- **Strong Academic Experiences (31%):** High standards, rigorous coursework, and opportunities for advanced learning
- **Flexible Curriculum (25%):** Content that is relevant, engaging, and adaptable to individual learning needs
- **Personalized Academic Support (21%):** Scaffolding, supports, and services that ensure that students' academic needs and interests are being met in a more student-centric manner

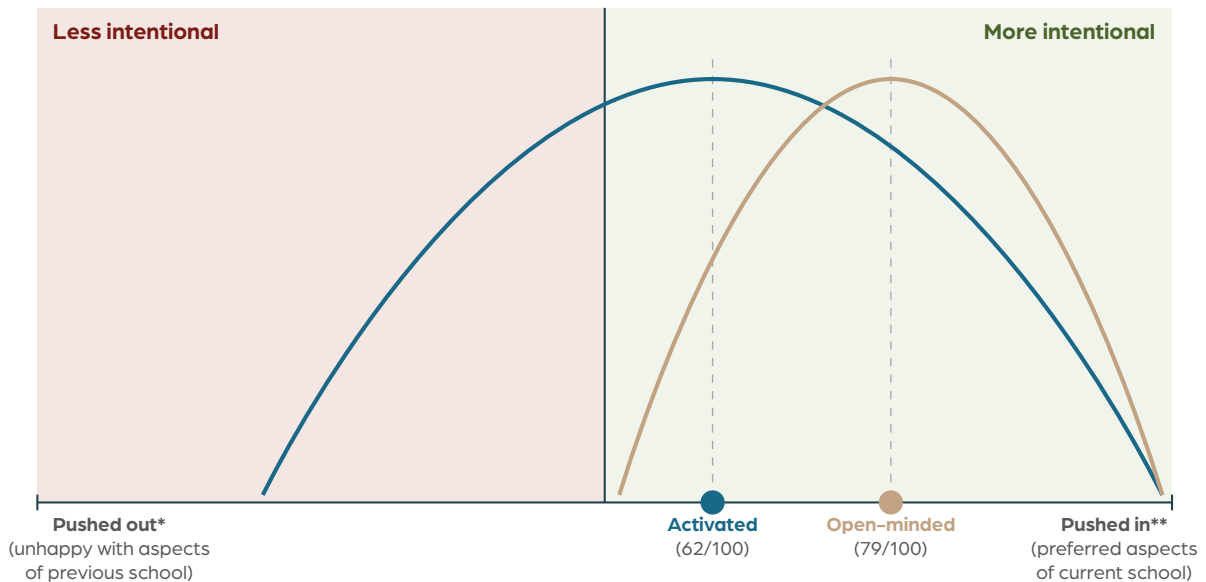
Parents want learning environments that challenge, engage, and inspire their children. Their priorities reflect a desire for academic rigor and flexibility, reinforcing the need for schools to offer both security and meaningful educational experiences that support long-term student success.

PARENT DEMAND IS BECOMING MORE DELIBERATE, BUT URGENT PAIN POINTS STILL DRIVE SCHOOL CHOICE DECISIONS

While parents consider multiple factors when exploring alternatives to their local district, **acute challenges often force them to make a rapid decision.** These urgent situations give families limited time to assess available options, significantly shaping their decision-making process.

Open-minded parents who have not yet made a school switch for their child tend to have an optimistic view that school selection will be a proactive and intentional process, believing they will have time to research and evaluate options thoroughly. In reality, most parents make a school switch when an immediate need forces them to act. This trend is reflected in the difference in decision-making “intentionality” highlighted between Open-minded and Activated parents below. On a relative basis, Activated parents are more likely to feel “pushed out” of their current school situation, whereas Open-minded parents—who have not made a decision—believe they will have more time.

Figure 3:
Maturity of parent decision-making



Notes: *Survey question: “Which of the following statements best describes why you are interested in finding a new alternative school (e.g., microschool school, private school, etc.)?”, n=211; **“What were the main reasons why you selected your oldest child’s current school? Select all that apply.”, n=1856, “Only option” and “Required” are excluded from analysis;

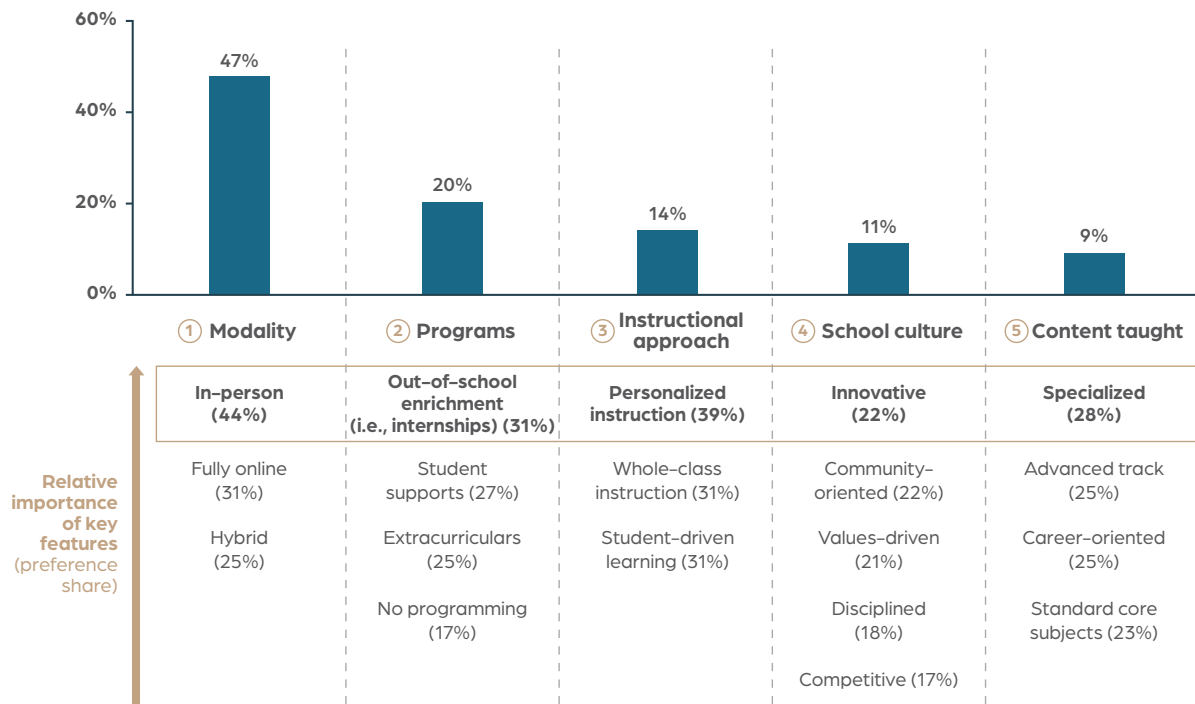
Sources: Choose to Learn Parent Survey 2024, Tyton Partners analysis

AS PARENTS MAKE TRADE-OFFS, ENRICHMENT OFFERINGS CARRY WEIGHT

When navigating alternative school options, parents face complex trade-offs between the conventional elements of a school and more nuanced attributes comprising the educational “experience.” **With limited time and information, parents often prioritize gating needs**—such as school setting, modality, and schedule—and find it more difficult to evaluate more meaningful factors like curricular approach and school culture. This dichotomy highlights **the tension between solving urgent problems and evaluating options with intentionality.**

Parents value a wide range of qualities in their child’s K-12 education, making it clear that no single school model can meet every family’s needs. To respond to this diverse set of aspirations, district and alternative models must present more choices through strategies like flexible pathways, enrichment options, and personalized support, among other approaches and offerings.

Figure 4:
Relative importance of key criteria within ideal school model
Derived from conjoint



Notes: *Choice-based conjoint survey (CBC) question: "Which combination below would you prefer for your child's education?", n=1604; ***Imagine the ideal school for your child. What is the maximum price you would be willing to pay for the school each year?", n=1604

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

Activated parents are increasingly exploring educational models that extend beyond the traditional classroom environment; their demand for flexibility and customization drives interest in hybrid and virtual models, as well as enrichment programming that enhances core learning. Real-world learning opportunities—such as internships—are also a key driver of school selection for families who prioritize programming when considering alternative models.

For many of these parents, the shift away from conventional schooling is about breaking free from rigid structures that fail to address their family's circumstances or child's academic needs. They prioritize models that offer adaptable modalities, whether through virtual learning, flexible schedules, or a combination of in-person and online instruction. This adaptability allows parents to create a learning environment that feels safer and more personalized.

K-12 public school districts and alternative schools that recognize and address these evolving priorities will be better positioned to meet the needs of all parents seeking innovative, flexible, and safe learning environments.

WHAT SCHOOLS AND PROVIDERS SHOULD DO

To effectively support both **Activated and Open-minded parents**, education providers—including public districts and alternative school operators —can invest in both **communication strategies** and **program innovation** that reflect what families are seeking: safer, more flexible, and higher-quality learning experiences. Notable strategies include the following:

- **Develop Intuitive Decision Pathways:** Help families weigh trade-offs between different models, modalities, and program options, particularly in moments of urgency. Build or implement user-friendly, digital applications that provide insight into students' longer-term goals, their trajectory and performance relative to these goals, and learning offerings or interventions that can support them on this journey.
- **Engage Open-minded Parents Early:** Communicate proactively with families, sharing resources and solutions with families before they face an urgent challenge or concern. Stronger parental engagement can enable school districts to better support and retain families or help them make more intentional choices as they explore a better fit.
- **Expand Modalities and Program Pathways:** Ensure that the school—or system—reflects the diversity of parent needs and preferences by offering a range of models and learning pathways, including hybrid, virtual, experiential, and community-based options. This programmatic diversity helps ensure that families can find an educational experience that aligns with their values, children's needs, and long-term goals.

As parent demand matures and families move from reacting to crises to actively shaping their educational journeys, they are **giving schools permission to innovate**—but with that permission comes higher expectations. Schools must respond not only with new models but also with clarity, transparency, and quality. Those that do will be best positioned to earn families' trust and thrive in this dynamic K-12 era.

SECTION 2: K-12 “SCHOOL” LANDSCAPE ADDRESSES PARENT NEEDS WITH VARYING LEVELS OF SUCCESS

While the pandemic sparked a new era of experimentation, parents have become more discerning in their search for the best educational fit for their children. The availability of alternative school models has expanded considerably, yet high turnover rates suggest that many families have yet to find an ideal solution that addresses their priorities fully. Most notably, we’ve noticed the following:

- Parents are no longer making one-time decisions—they are continuously reassessing school fit.
- A gap between expectation and experience persists—for example, only 23% of Activated parents believe that their child’s school is an ideal cultural fit.
- 38% of Activated parents are likely to switch schools again, highlighting their continued search for the best fit.
- Anticipated turnover in place-based models signals a continued need to align private school and microschool models with families’ academic and cultural needs.

PARENT EXPECTATIONS OUTPACE REALITY OF CURRENT STATE

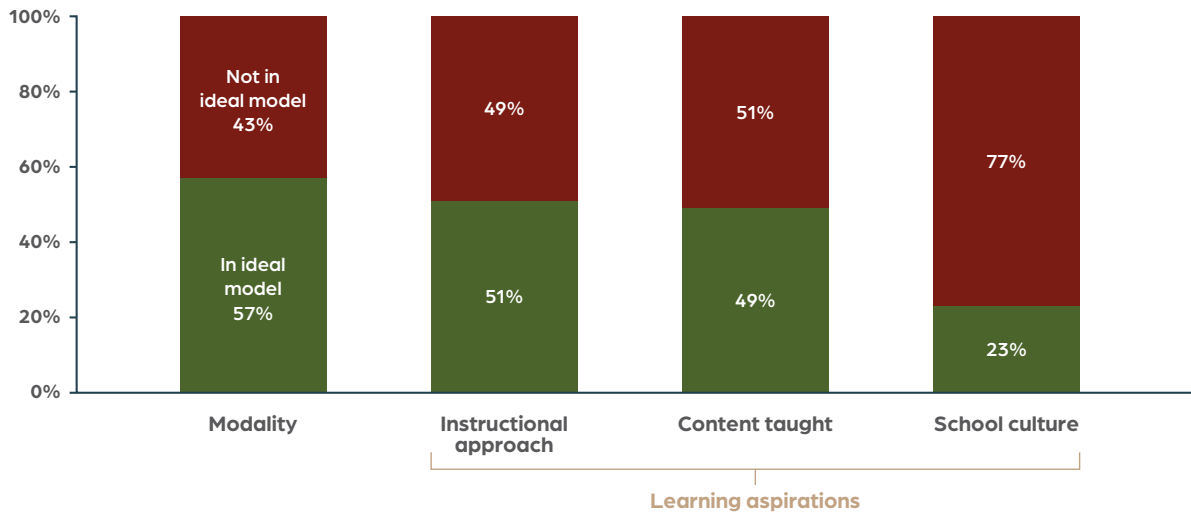
Despite the growing availability of new school models, expressed gaps between parents’ ideal and current states indicate that **they are still navigating a trial-and-error process**. Unlike past decades, when families primarily evaluated schools based on location and reputation, today’s parents seek deeper alignment across a broader set of factors (e.g., safety, curriculum, flexibility, and culture).

While alternative school options may address logistical concerns such as location convenience or scheduling flexibility, they can fall short in fostering the strong community connections that parents desire. For example, only one in two Activated parents indicate that their child is receiving their ideal instructional experience (51%) and content (49%), and only 23% of Activated parents report that their child is currently enrolled in a school that embodies their ideal culture. These indicators reinforce the disconnect between expectations and reality in many alternative school settings.

Figure 5:

Percent of parents currently enrolled in their ideal model at the criteria level*

Derived by comparing conjoint to current state**



Notes: *Choice-based conjoint (CBC) survey question: “Which combination below would you prefer for your child’s education?”, n=1604; **Percent in ideal model is calculated by taking the percentage of respondents who indicate an ideal modality by the number of respondents who indicate that their ideal is their current model; “Programs” is not shown because current state was not asked in survey

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

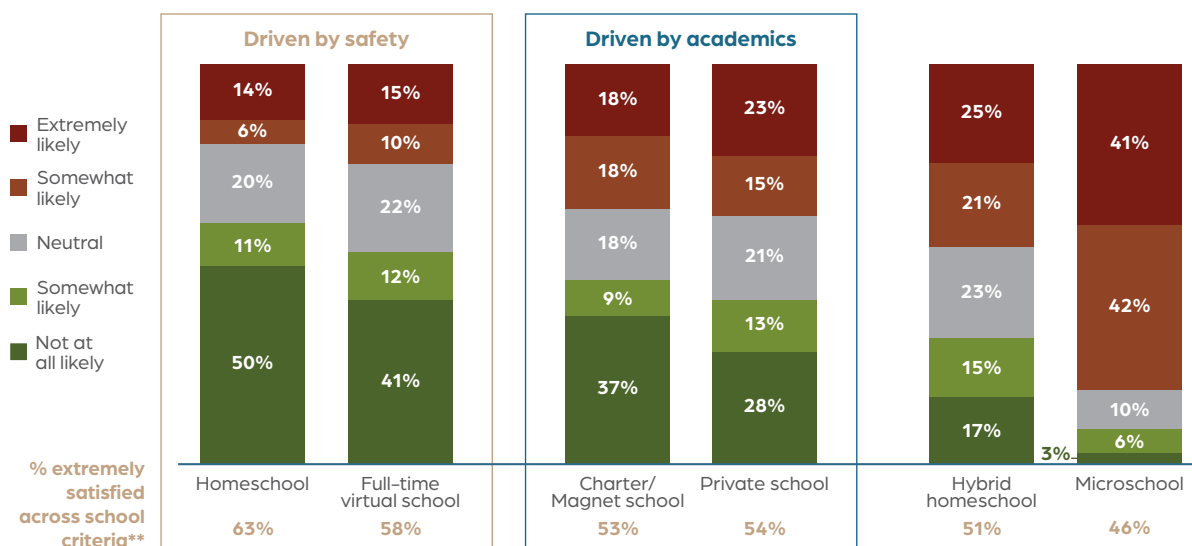
Parents want a school environment that is supportive, socially engaging, and diverse—one that extends beyond academic rigor to cultivate a sense of belonging and personal growth. As one Activated parent emphasized, “It’s so important that our kids get support and feel that they are worthy.”

This need for a nurturing and affirming school culture is echoed by others, with Open-minded parents stating, “We want an overall social environment where our child learns how to exist within a community,” and, “A good school environment is one that is racially and socio-economically diverse.”

HOME-BASED MODELS SHOW BETTER RETENTION RATES

For many parents, the search for a better school fit is ongoing. Among Activated parents, 38% indicate they are likely to switch schools for their child again in the near term. Among alternative options, **place-based schools—including private schools and microschools—are likely to experience higher turnover rates** than in-home or hybrid models.

Figure 6:
Likelihood to switch schools in the future*
Among Activated parents



Notes: *Survey question: "How likely are you to move your oldest child to a different K-12 school in the future?", n=1604, Private n=335, Charter/Magnet n=502, Hybrid homeschool n=53; Homeschool n=310, Full-time virtual school n=204, Microschool n=200; **"How satisfied are you with the following factors of your child's current school?", n=1604, Private n=335, Charter/Magnet n=502, Hybrid homeschool n=53, Homeschool n=310, Full-time virtual school n=204, Microschool n=200

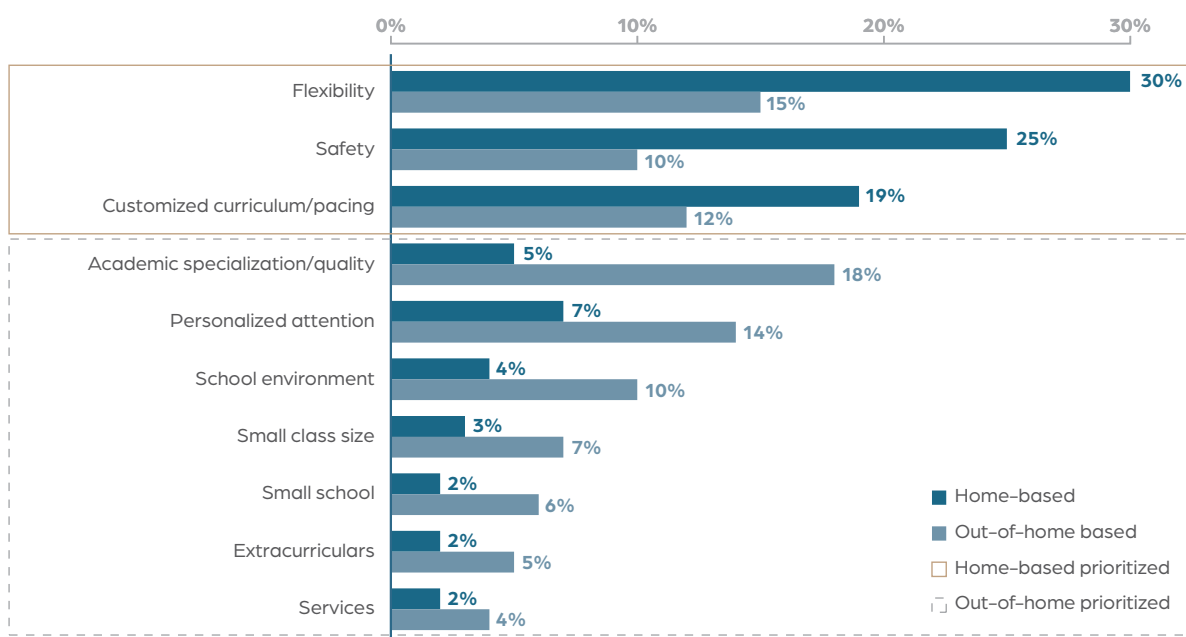
Sources: Choose to Learn Parent Survey 2024, Tyton Partners analysis

While place-based models offer structured learning environments and specialized curricula, they may struggle to demonstrate how their approach translates into better outcomes, especially if they do not rely on traditional measures of success (e.g., test scores). Moreover, they may struggle to provide parents with the desired level of visibility into their child's academic experience—a primary driver of enrollment for families in place-based models (see Figure 7 below). High relative turnover suggests that alternative schools' vision for learning may not be translating well into practice—or, if it is, the strength of the model may not be as clear to families as it needs to be to sustain enrollment.

On the other hand, parents' lower likelihood to switch their children from current home-based models suggests that they provide a sense of stability and fulfillment that place-based models struggle to achieve. A major factor driving retention in home-based education is parents' perception regarding their safety and flexibility. Parents who opt for homeschooling or virtual learning do so primarily to ensure their child's physical and emotional well-being. These models eliminate risks associated with traditional school, such as bullying, physical violence, and social pressures, as noted by some Activated parents:

- *"I'm homeschooling to guarantee my kids' safety."*
– Activated parent (in homeschool)
- *"I personally chose online school because it's safe and better for my child physically and mentally."*
– Activated parent (in virtual school)

Figure 7:
Top reasons listed for enrolling in chosen alternative school model
Among Activated parents



Notes: *Survey question: “For the following question, please fill in the blanks using a word or short phrase: The reason why I chose to enroll my child their current school is because it is ____ and offers ____.”, n=1604, frequency count was derived using a text analysis to measure the number of times a word (or its close synonym) were mentioned in Activated parent open-ended responses, and percentages were derived by calculating the frequency count relative to the total number of mentions across all factors

Source: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

WHAT SCHOOLS AND PROVIDERS SHOULD DO

As options for parents and students in the school choice landscape continue to proliferate, the challenge for providers is twofold: **help families find the right fit** and **deliver high-quality programs that meet expectations**. Parent demand is nuanced, shaped by priorities like safety, a supportive school culture, academic rigor, and real-world learning—but existing “schools” often fall short in meeting all these expectations. With 38% of Activated parents still searching for a better fit, providers can seek to attract families by **clearly communicating their offerings** and retain them through **consistent family engagement**.

PARENT-CENTERED COMMUNICATION TO IMPROVE MATCHING

Notably, K-12 providers can help families find the best match by communicating their approach—and how it aligns with parent priorities—in simple, relatable terms. More transparent communication empowers families to make more confident, informed decisions, which improves family alignment from the start.

Education providers can support better matching by doing the following:

- Clearly articulating academic offerings and cultural values so that parents can easily understand how a school aligns with their priorities
- Using simple, jargon-free language to describe programs
- Framing offerings around real-world parent concerns—safety, engagement, and well-being
- Shifting language in small ways that make a big difference
 - Instead of “learner-centered pedagogy,” saying that learning is personalized
 - Instead of “inquiry-based curriculum,” describing how students stay engaged and curious
 - Instead of “competency-based progression,” explaining how students move at their own pace without falling behind

INCREASED CLARITY AND VISIBILITY DRIVE TRUST

Moreover, providers can strengthen school-to-family connections by demonstrating how their approach produces better outcomes. Parents seek stronger insight into their child’s daily learning experiences, and when schools fail to provide this, families may look elsewhere. By making a child’s experiences more **visible and accessible** to parents, alternative schools can better demonstrate their value, driving **satisfaction and retention**.

“Everything considered, I am quite pleased with my child’s school and the encouraging atmosphere; still, more transparent communication would keep us more engaged. I’m asked to have blind faith in the learning process.”

– Activated parent (in microschool)

“While it’s wonderful to watch my child flourish, there is room for improvement in the school’s parent-teacher communication. Sometimes I feel detached.”

– Activated parent (in microschool)

Education providers can build trust with families by doing the following:

- **Providing regular, structured insights into student learning**, such as digital progress updates, classroom observation opportunities, or more frequent teacher-parent communication
- **Communicating with respect and in a spirit of partnership**, positioning families as key decision-makers in their child’s education
- **Creating multiple avenues for parent engagement**, including workshops, social events, and parent advisory groups, to foster a stronger sense of partnership and belonging

SECTION 3: NAVIGATING A COMPLEX SCHOOL CHOICE LANDSCAPE—PARENTS NEED STRONGER DECISION SUPPORT

As the K-12 education landscape evolves, parents face an increasingly complex web of in-system and out-of-system options. While the accessibility of school choice provides families with more configurable educational pathways, it also introduces new challenges in decision-making. Without structured guidance, many parents struggle to assess the trade-offs between different models, leading to uncertainty and decision fatigue. Among our findings this year, key challenges include the following:

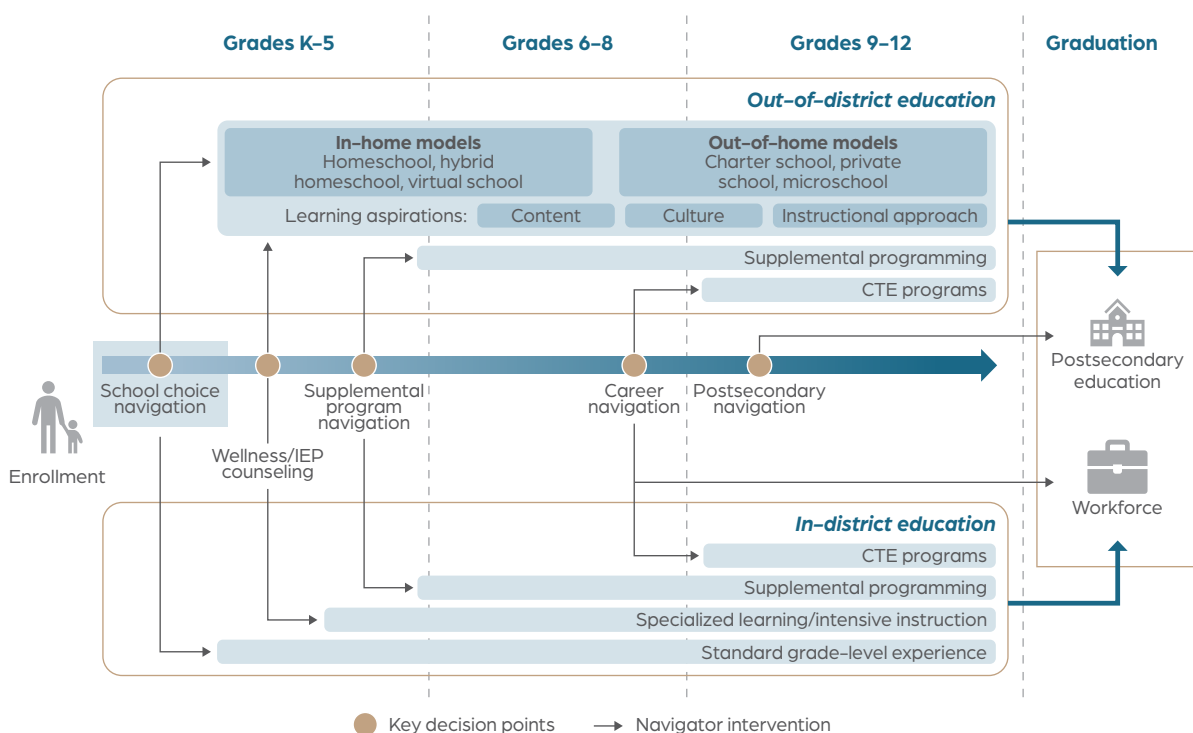
- Parents have more school choices than ever, but these decisions are increasingly complex and carry high stakes.
- Despite the rising demand for alternative schools, many parents still rely on informal networks—friends, family, and DIY research—for decision-making.
- Only 43% of Activated parents have used a Navigator, despite the growing number of available school selection tools and services.
- Parents highly value guidance in the school selection process and are willing to pay individuals and/or an organization for navigation support, representing a potential \$4 billion market opportunity.

THE PARADOX OF CHOICE: MORE OPTIONS MEAN MORE COMPLEXITY AND A GREATER NEED FOR SUPPORT

The expansion of school choice presents a fundamental paradox: **while greater optionality empowers parents, it also increases the need for help in making good decisions.** As more learning models emerge—from microschools and hybrid programs to virtual academies and homeschooling cooperatives—parents are now expected to make increasingly complex decisions, often with limited and incomplete information. What was once a relatively straightforward choice has evolved into a landscape filled with nuanced trade-offs related to modality, curriculum, safety, flexibility, cost, and culture, among other variables.

Today's families are no longer making a single, static enrollment decision. Instead, they face **multiple decision points** throughout their child's educational journey—navigating grade transitions, selecting specialized programs, or adapting to changing needs. Even within public districts, parents may choose among varying levels of academic support (e.g., interventions, special education) and supplemental learning opportunities. At the high school level, districts often offer career- and college-focused pathways such as Career-Technical Education (CTE) or Dual Enrollment (DE). Beyond districts, the range of options expands further, with alternative models offering a range of philosophies, modalities, and instructional methods. For example, some prioritize self-directed learning and flexible pacing, while others emphasize academic rigor, early college credit, and high-stakes exam preparation. This growing variety of school models requires families to navigate a layered decision-making process.

Figure 8:
Current K-12 education pathway



Sources: Tyton Partners analysis

Moreover, in today's landscape of expanding school options, early K-12 decisions carry real weight—shaping both short-term learning and long-term college and career outcomes.⁸ With the increasing emphasis on career-connected learning and early skill development, families will aim to fine-tune postsecondary and workforce implications much earlier in their child's K-12 journey. Early decisions matter greatly for reasons that include the following:

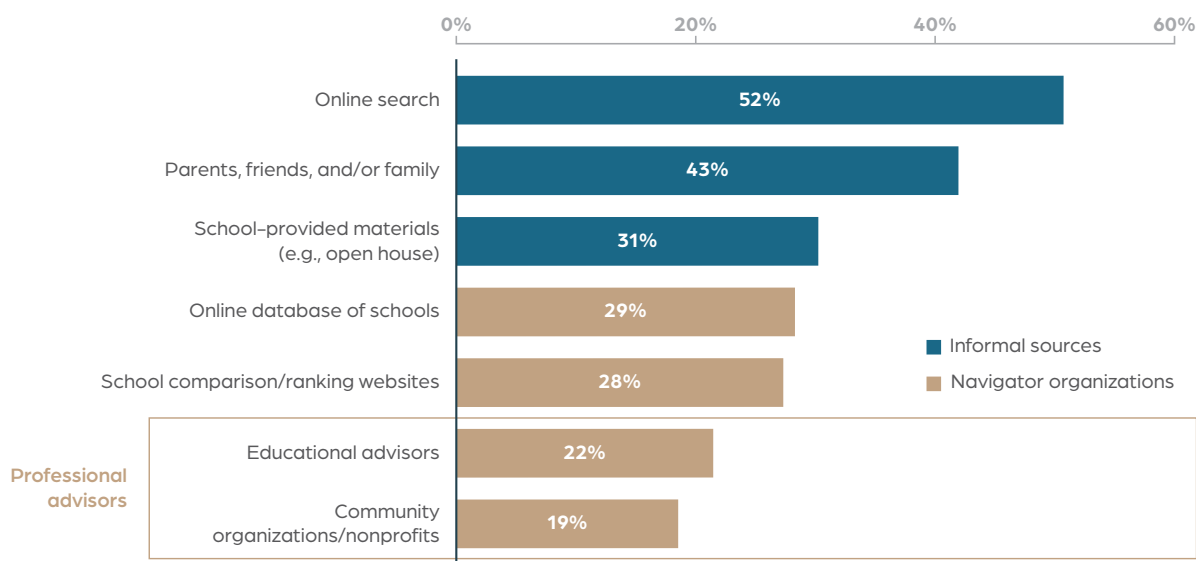
- **Shifting Postsecondary and Career Readiness Timelines:** Historically, college and career planning were concentrated in high school. Today, exposure to career pathways, technical skills, and college-prep coursework begins as early as elementary and middle school.
- **More Specialized Learning Tracks in K-12:** Many schools now offer career academies, dual-enrollment programs, and industry certifications at younger ages, encouraging parents to consider these options earlier and select schools and programs that align with long-term aspirations.

8. Academic research, such as *Harvard's Opportunity Insights Project*, has demonstrated the lifelong impact of early education experiences. Their studies show that students who spend a year with a great elementary school teacher are not only more likely to attend college but also earn an average of \$50,000 more throughout their careers. This evidence, among other studies, suggests that early academic experiences lay the foundation for economic mobility.

MOST PARENTS CURRENTLY NAVIGATE SCHOOL CHOICE VIA A “DIY” APPROACH

Despite the growing complexity of school choice, most parents navigate decisions on their own. Activated parents, in particular, rely heavily on informal methods—search engines, social media, and personal networks—to make high-stakes decisions about their child’s education.

Figure 9:
Sources of information used during school search
Among Activated parents



Notes: *Survey question: “Where did you get your information about different schools during your search? Select all that apply,” n=1604, Chart excludes “None of the above” (4%) and “Other” (1%); **Percentages are statistically significant

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

These resources can be helpful, but they often **lack structure, objectivity, and personalization.**

“My search process involved a lot of Google and talking to people.”

– Activated parent

“I had access to friends and family; some teachers were helpful too.”

– Activated parent

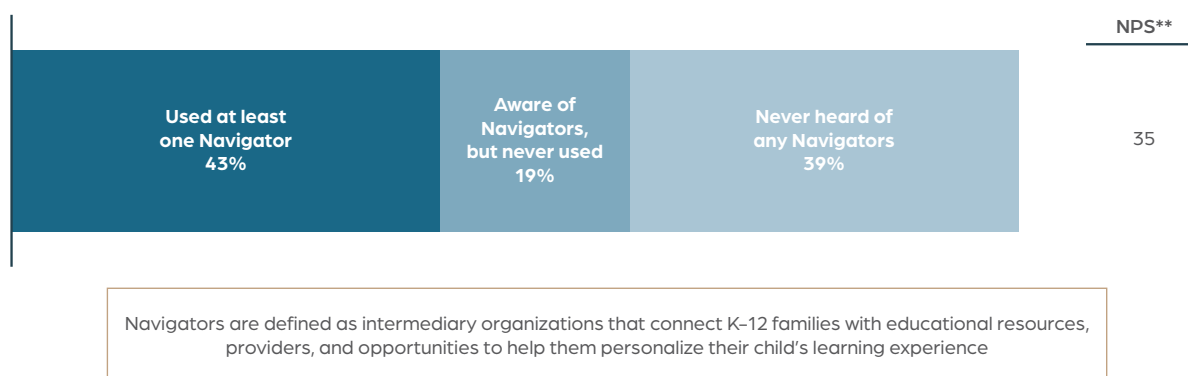
NAVIGATORS CAN PLAY A CRITICAL ROLE GUIDING PARENTS THROUGH SCHOOL CHOICE DECISIONS

Many parents express frustration with the **fragmented nature of school search resources**, underscoring the opportunity for **more comprehensive/consolidated, user-friendly solutions** that can support and enhance decision-making. Fewer than half of Activated parents (43%) report having used a Navigator, underscoring the limited reach and visibility of these resources.

Figure 10:

Overall usage and awareness of Navigator organizations*

By Activated parents



Notes: *Survey question: "How familiar are you with the following Navigator organizations?", total n=1604, used Navigators n=688, aware of Navigators n=298, never heard of Navigators n=618, fewer than 7% of parents reported using or knowing of a Navigator outside our listed organizations, indicating that our Navigator data accurately represents the broader Navigator ecosystem; **"How likely are you to recommend the following Navigator organization(s) to another parent?", n=688

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

Ideally, parents express interest in a one-stop shop where they can easily compare schools, explore funding options, and navigate application requirements.

"[I want the ecosystem to] establish a complete model to help students' parents with a one-stop service. Simplify the operation and effectively improve the choice of more parents who do not know how to choose."

– Activated parent

Effective Navigators serve as a key resource to demystify the school selection process and guide parents through multiple decision points. By providing structured, third-party expertise, **Navigators help families understand their options, weigh trade-offs, and navigate funding mechanisms that may otherwise be inaccessible.**

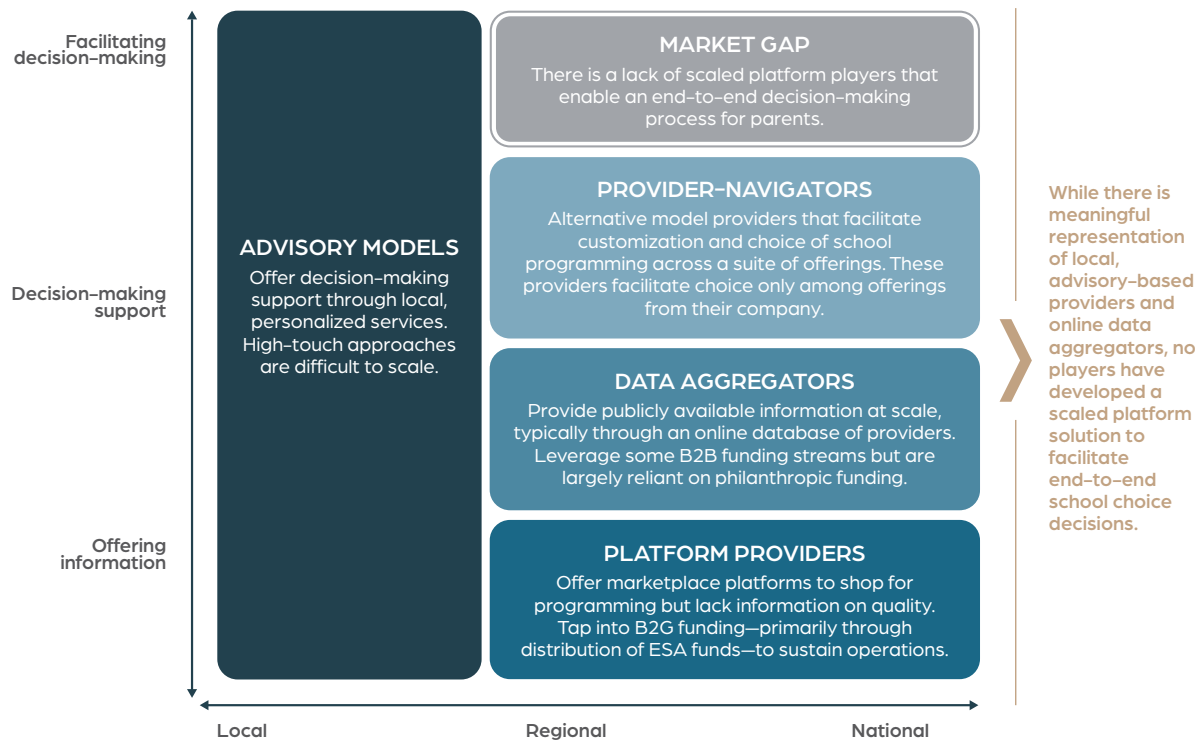
As parent demand becomes more intentional, an opportunity exists to build on the foundation laid by existing navigation tools and services. Many organizations have already played a key role in helping families access information and explore new educational pathways. The next generation of navigation support must evolve to meet the growing complexity of parents' decisions with greater depth and personalization.

In the current environment, parents are not just looking for lists of schools—they need trusted, guided support to evaluate fit, compare trade-offs, and make confident, informed choices. Today, a market gap exists for most parents seeking an organization that can

provide this end-to-end support. Platform providers and data aggregators leverage online models to reach parents at scale but tend to lack interactive components and personalized insights to help parents make personally informed and intentional decisions (see graphic below). On the other hand, advisory models furnish parents with intensive, direct guidance to explore school/program trade-offs but tend to lack reach (to parents) and visibility into the full range of school models available.

Figure 11:

Illustrative market map of K-12 Navigator categories



Key indicators of a high-quality Navigator organization include the following:

- **Personalized guidance, tools, and data-informed insights** that help families align school options with their values, needs, and long-term goals
- **Interactive decision supports** that walk families through trade-offs across various school choice options (e.g., modalities, curriculum, culture, cost, outcomes data)
- **One-on-one assistance** for families who need more tailored help, especially those navigating specialized needs or eligibility requirements
- **Proactive support access to funding resources like ESAs** or other scholarship funds, increasing the utility of the tool and improving equity of access

These attributes represent part of a natural evolution, building on the work already underway across the sector. Simultaneously, this shift toward **smarter, more parent-centered navigation** represents a critical next step in the school choice movement. By investing in and expanding their capabilities, leading Navigators can ensure that more families—not just those with time, resources, or strong personal networks—can confidently navigate school choice options and find the best fit for their child.

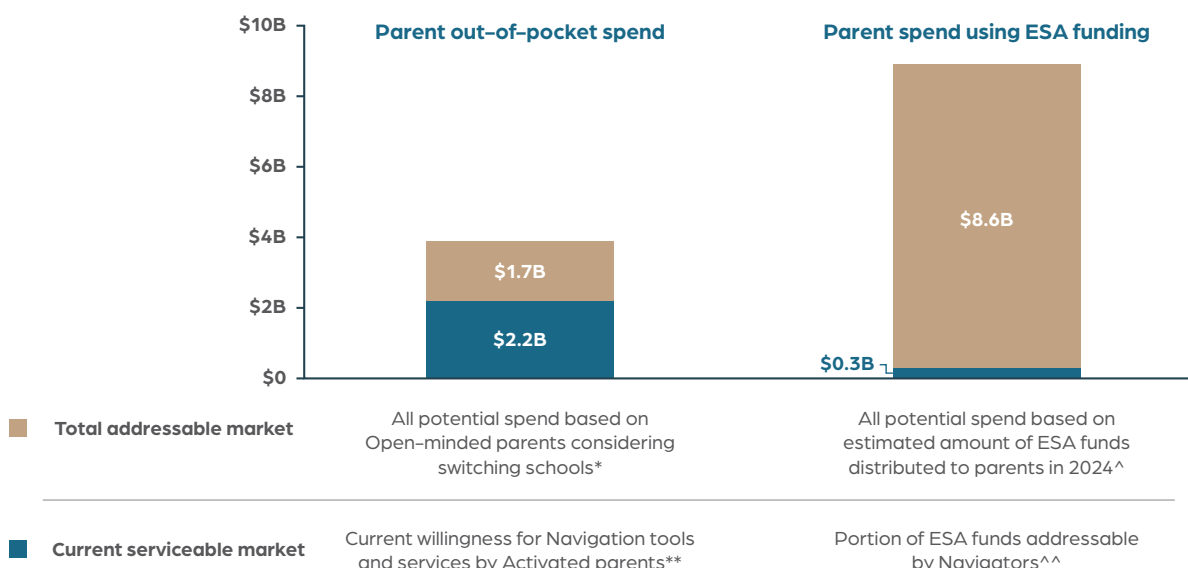
PARENT WILLINGNESS TO PAY SIGNALS \$4B MARKET OPPORTUNITY FOR NAVIGATORS

Parents' openness to pay for school navigation services is an indication that they value structured decision support and higher-quality guidance. As school choice becomes broadly available, **families increasingly will view navigation as an essential service rather than a luxury**. Activated parents express a willingness to spend \$209 on average per year out of pocket for such support; when combined with Open-minded parents' willingness to pay for support, this demand represents a potential \$4 billion market opportunity for Navigators delivering decision-support services.

Beyond out-of-pocket spending, Education Savings Account (ESA) funds present another significant opportunity to expand navigation access. If all eligible families were fully leveraging available ESA funds, an additional \$9 billion could be directed toward navigation services based on parent willingness to allocate 5% of funds toward navigation.

Figure 12:

Illustrative market opportunity for Navigators, by funding stream

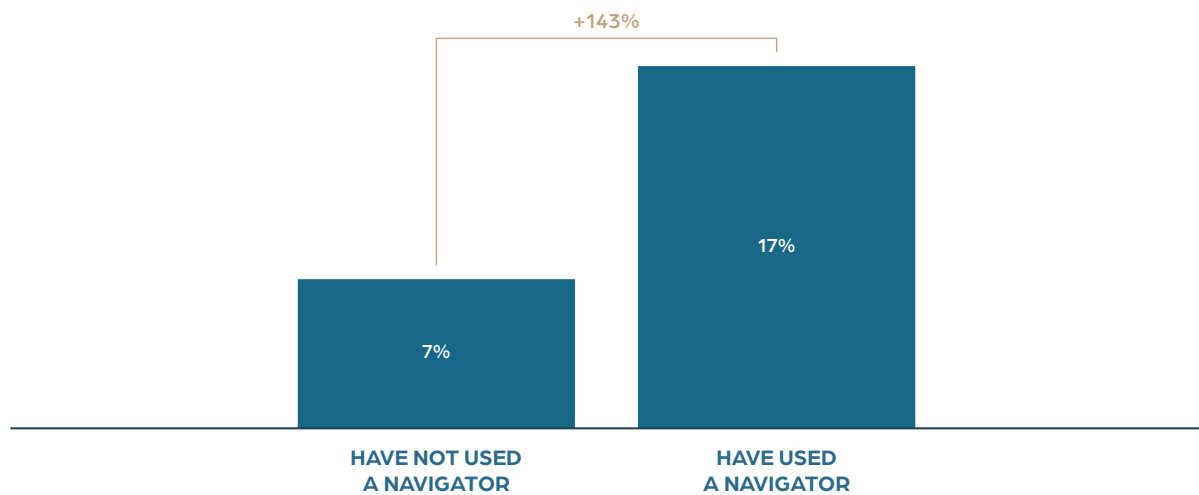


Notes: *Multiplies K-12 parents in the US (48M) by the percent Open-minded to a new school (48%) and the portion of those who are considering a school switch in the next 1-2 years (36%); **Assumes the 10.6M Activated parents pay on average \$209 out-of-pocket for Navigator services based on average willingness to pay for Navigation tools and services; ^Assumes the total number of eligible ESA students across all 17 states (22M) by the average ESA fund (\$7.5K); ^^Assumes 5% of total ESA funds addressable by Navigators based on average of \$390 each AZ parent is willing to pay for Navigation tools and services

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners ESA 2023 Parent Survey, NCES, EdChoice, Tyton Partners analysis

In states with prominent school choice funding legislation, Navigators play a crucial role in making these policies more accessible for parents. Many families are unaware of or confused by the details of choice funding programs, limiting their ability to take advantage of available resources. Nevertheless, Navigators can provide critical support—parents in ESA states who have worked with a Navigator are more than twice as likely to access ESA funds (17%) compared to those who have not used a Navigator (7%).

Figure 13:
Parents accessing ESA funds
Among Activated parents in ESA states



Notes: *Survey question: "Which of the following sources do you use to fund your child's K-12 education? Select all that apply."; n=418 (Have not used a Navigator), n=281 (Used a Navigator)

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

With more choice options than ever before, Navigators serve as a critical resource in helping families move from awareness to action, ensuring that school choice decisions are intentional and well-informed.

However, a critical gap in policy implementation exists because many parents remain unaware or uncertain about how to leverage ESA funds. By integrating navigation services into ESA-approved expenses, state policymakers and providers could further scale comprehensive, end-to-end school choice support, ensuring that more families have the resources to make informed, confident decisions without financial barriers.

WHAT K-12 STAKEHOLDERS SHOULD DO

To provide critical decision-support for families and address parents' decision challenges, education providers, policymakers, and business leaders should do the following:

- **Expand and Promote Navigation Services:** Increase awareness and adoption of Navigators to better guide parents through school selection processes, ensuring that families understand the value/benefit and availability of these partners.
- **Develop “Hybrid” Decision-Support Tools:** Pair tech-enabled models with targeted, one-on-one coaching and support to help families leverage data-driven insights while evaluating options based on their specific circumstances, aspirations, and needs.
- **Bridge the Information Gap with Clearer Communication:** Schools and education providers should continue to improve the decision-making process by transparently communicating their key program attributes, including differentiators and student success/outcomes details.
- **Cultivate Sustainable Navigator Models:** Currently, Navigator models are funded almost exclusively through philanthropy and government sources. Nurture an ecosystem of Navigators that may be subsidized by state-level school choice programs but may also offer reasonably priced fee-for-service offerings, given parents' expressed willingness to pay.

As school choice expands, navigation will become as important as access itself. The K-12 field's ability to nurture and develop a cohort of sustainable Navigator models providing high-quality decision-support services will be critical to help engage and support families in an increasingly complex K-12 landscape.

CALL TO ACTION

Parents are striving to make more intentional school choices for their children, willing to shift away from traditional school models and seeking more student-centric, real-world learning opportunities. In response, K-12 public districts and alternative schools will continue to face pressure to evolve to meet shifting demand. As such, 2025 is a pivotal window for education leaders to ensure that they are responding to the potentially transformational shifts taking root in the K-12 ecosystem.

- **District leaders** should embrace competition as a defining feature of the new K-12 landscape. To stay relevant and trusted, prioritize recruitment and retention efforts and explore how best to offer a broad set of student-centric learning pathways and experiences. In addition, be open to public-private partnerships; innovations occurring outside schools should be thoughtfully explored to expand access to new models and pathways for all students. Keeping pace with parents' shifting expectations and committing to implementing new program models can help reinforce the value and vitality of public districts.
- **Business leaders** have permission to innovate—especially through direct-to-family channels. Whether delivering education or providing the content, technology, or services to enable it, shifts in the K-12 market landscape caused by school choice policies could create massive new addressable market opportunities. Moreover, solutions aligned with parent needs are required to turn choice-friendly policy into effective practice and will be critical to ensure that families—and their children—achieve better outcomes in an increasingly fragmented ecosystem.
- **Funders** should invest in a stronger supplier ecosystem, including scalable and sustainable Navigators. Parents' and their children's needs vary widely—there is no one-size-fits-all school model. Advocates, philanthropists, and investors should support a range of student-centric initiatives and entrepreneurial models, with an appropriate emphasis on organizational sustainability. Moreover, Navigators that combine personalized coaching with data-driven insights will play a critical role in the choice ecosystem; catalytic capital⁹ can scale effective solutions and catalyze a market poised for expansion.

The trajectory of K-12 will depend on how effectively stakeholders anticipate and respond to the evolving needs of families. Momentum is building for new solutions across the K-12 landscape, creating a rare window for breakthrough progress in a field notoriously slow to change. The coming years are a moment for leaders to act with urgency, creativity, and collaboration to ensure that our K-12 sector reflects the diverse aspirations and needs of today's parents and their children.

9. Catalytic capital refers to investment capital provided to high-impact organizations that are traditionally overlooked by both market-rate investors and grantmakers; it can be deployed in situations where (a) the free market results in inefficient resource allocation and/or (b) a market does not yet exist and traditional private capital investors are unwilling to fund/create it (Tyton Partners, [Catalytic Capital 2025: Funding the Missing Middle in the Education-to-Workforce Ecosystem](#))

APPENDIX

THANKS AND ACKNOWLEDGMENT

This publication and its findings were made possible by generous support from the Walton Family Foundation and Stand Together Trust. The findings and recommendations contained within are those of Tyton Partners and do not necessarily reflect positions or policies of the Walton Family Foundation nor Stand Together Trust. We are particularly grateful for the leadership and support from the Foundation's K-12 program officer, Jamie Jutila, and Stand Together Trust's senior director, Adam Peshek.

We want to express appreciation for the more than 1,600 parents who responded to our surveys and engaged with us in focus groups. Our work was informed and guided by the parents, education advocacy leaders, and navigation experts we interviewed during this process.

RESEARCH OVERVIEW

Tyton Partners captured input from a variety of sources throughout this engagement, including parents of K-12 students and field experts.

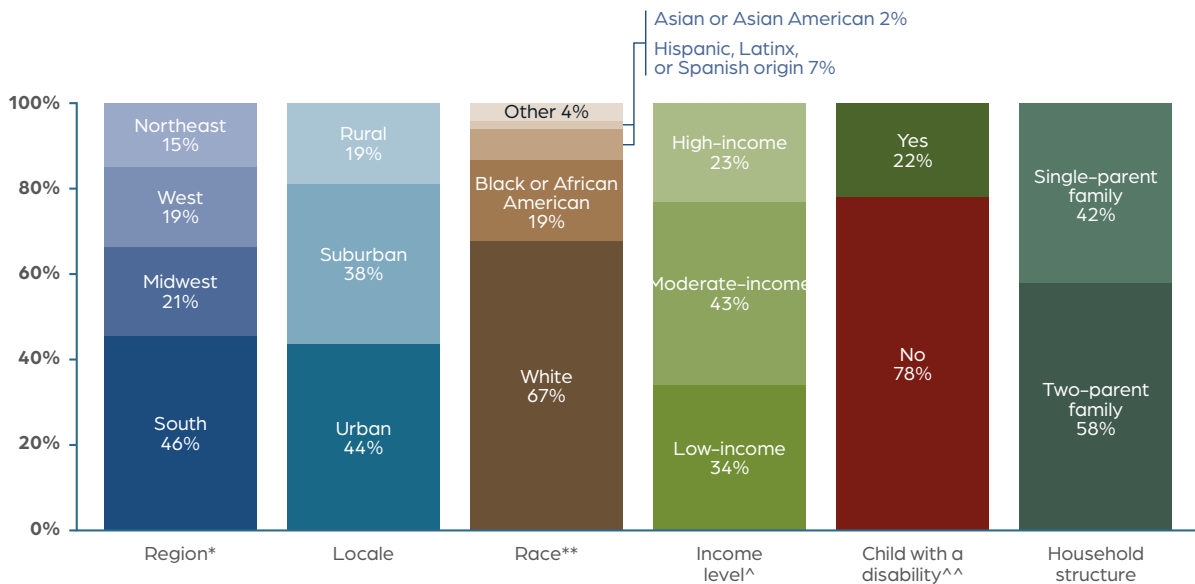
- **Parent Survey:** Fielded a large-scale survey, generating feedback from more than 1,600 US Activated parents who have made a switch to change their child's primary school model
- **Parent Focus Groups:** Conducted focus groups with Open-minded parents and Activated parents, speaking with more than 20 parents geographically spread across the US, to better understand parent aspirations, hesitations, barriers, and enabling factors around changing their child's learning experience
- **External Interviews:** Spoke with leaders across the K-12 ecosystem, including program operators and researchers, to shape understanding of the stages of K-12 parent journeys and develop perspective on choice and switching dynamics

SURVEY METHODOLOGY

Tyton Partners conducted extensive research to collect data on Activated parents' journeys and key decision criteria when making a change to their child's education. Our primary research, conducted in October 2024, includes a survey of more than 1,600 K-12 parents across the United States. Parents were screened into the survey as "Activated" based on a past change in their child's primary school model.

Parents are core influencers and decision-makers in their child's educational experience. To best understand how and why families make educational choices, Tyton gathered input from a diverse sample of K-12 parents. Parents focused on one child throughout the survey, and we set targets to ensure appropriate levels of representation relative to the demographics. All analyses were examined through the lens of key demographic indicators, and any significant findings are included in the report.

Figure 14:
Activated parent survey demographics
(n+1,604)



Notes: *US breakdown of region: Northeast=17%, Midwest=20%, West=24%, South=38%; **US breakdown of race: White=76%, Hispanic or Latinx=19%, Black or African American=14%, Asian or Asian American=6%; ^US breakdown of household income: Low income (<\$50,000)=35%, Moderate income (\$50,000-\$149,999)=45%, High income (\$150,000+)=20%; ^^Disability status includes intellectual, developmental, and physical disabilities

Sources: Choose to Learn 2024 Parent Survey, Tyton Partners analysis

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Tyton Partners is the leading provider of investment banking and strategy consulting services to the global knowledge and information services sector. With offices in New York City and Boston, the firm has an experienced team of bankers and consultants who deliver a unique spectrum of services from mergers and acquisitions and capital markets access to strategy development that helps companies, organizations, and investors navigate the complexities of the education, media, and information markets. Tyton Partners leverages a deep foundation of transactional and advisory experience and an unparalleled level of global relationships to make its clients' aspirations a reality and to catalyze innovation in the sector. Learn more at tytonpartners.com.