

# PAYING FOR CHOICE

2024

PART 1: THE ESA [R]EVOLUTION



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# WHY ESA PROGRAMS MATTER

On July 7, 2022, flanked by parents and students in a small school gym at Phoenix Christian Prep, then Governor Doug Ducey signed into law Bill 2853, expanding Arizona’s 11-year-old Education Savings Account (ESA) program to cover all 1.4 million school-aged children in the state.<sup>1</sup> Distinguished from other school choice mechanisms like vouchers and tax-credit scholarships, ESAs afford parents wide-ranging flexibility in how they utilize government funding for educational alternatives. In an accompanying press release, Governor Ducey stated,

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Our kids will no longer be stuck in under-performing schools. We’re unlocking their educational potential and advancing a bold new era of learning opportunities. Parents and teachers know there is no one-size-fits-all model to education. Kids and families should be able to access the school or learning program that best fits their unique needs—*regardless of income or where they live.*<sup>2</sup>

The passage of Bill 2853 came at a time of unprecedented disruption to America’s public education system. More than two years after the start of the COVID-19 pandemic, schools were still reeling from closures and student withdrawals. Between Spring 2021 and Spring 2022, public school districts experienced an estimated 9% (or over 4 million students) decline in enrollment, a sharp increase from the 1.2-million-student decline from Fall 2020 to Spring 2021.<sup>3</sup> As remote and hybrid learning gave parents unprecedented views into their children’s classrooms, families pulled their children out of traditional public schools in favor of charter, private, home, and other alternative schooling options.<sup>4</sup>

As teachers felt increasingly burned out and started leaving the profession, as student performance declined in significant ways, and as parents’ demand for change became more strident,<sup>5</sup> Arizona’s decision to enable families to use public dollars to pay for private education options felt like a flashpoint. In the decade after Arizona enacted the country’s first ESA program in 2011, seven other states passed similar bills, all with limited eligibility, usually aimed at students with special needs.

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1. reimaginED. (2022, August 18). Arizona Gov. Doug Ducey and families celebrate establishment of education savings accounts for all students. [www.reimaginedonline.org/2022/08/gov-doug-ducey-celebrates-landmark-legislation-establishing-education-savings-accounts-for-every-student-in-arizona](http://www.reimaginedonline.org/2022/08/gov-doug-ducey-celebrates-landmark-legislation-establishing-education-savings-accounts-for-every-student-in-arizona)
  2. *Ibid.* Emphases added
  3. Tyton Partners. (2022, September 20). *School Disrupted 2022, Part 1*. [www.tytonpartners.com/school-disrupted-part-1-pandemic-driven-decline-in-k-12-public-school-enrollment-continues](http://www.tytonpartners.com/school-disrupted-part-1-pandemic-driven-decline-in-k-12-public-school-enrollment-continues)
  4. Hess, R. (2021, August 4). *Let’s Make Transparency the Pandemic’s Educational Legacy*. EdWeek. [www.edweek.org/policy-politics/opinion-lets-make-transparency-the-pandemics-educational-legacy/2021/08](http://www.edweek.org/policy-politics/opinion-lets-make-transparency-the-pandemics-educational-legacy/2021/08)
  5. Carr, N. & Waldron, L. (2023, July 19). *How School Board Meetings Became Flashpoints for Anger and Chaos Across the Country*. ProPublica. [projects.propublica.org/school-board-meetings-flashpoints-for-anger-chaos](https://projects.propublica.org/school-board-meetings-flashpoints-for-anger-chaos)

Since the passage of Bill 2853 in 2022, seven other states have either passed new ESA legislation or expanded eligibility. A program that at the dawn of the COVID-19 pandemic had roughly 2.2 million eligible students nationwide will cover roughly 10.2 million children in 13 states in 2024,<sup>6</sup> representing approximately 20% of U.S. K-12 student enrollment.<sup>7</sup>

Figure 1

### The Three Milestones in the History of ESAs



Understanding ESA programs demands that we study the needs and desires of families as well as the motivations and challenges of education providers. *Paying for Choice*, published as a three-part series, explores parents and education providers' perspectives on ESAs to examine the programs' potential impact and necessary improvements.

We focused our research on the states of Arizona and Florida, two of the earliest to introduce universal ESAs.<sup>8</sup> Our research was extensive and included two large-scale surveys with parents and providers in Florida and Arizona with more than 1,200 parent respondents and nearly 180 provider respondents operating in those states, the largest concentrated sample of families and providers in two states on attitudes toward school choice that has been carried out in the U.S. (see Appendix for survey methodology and demographics).

In addition to a quantitative survey, we conducted many conversations with parents, industry experts, and providers and received guidance from an advisory board of leaders with notable exposure to the school choice ecosystem. In examining both demand- and supply-side dynamics in two of the largest ESA programs in the country, our study offers increased visibility into the current state and success of these programs. Moreover, this research builds on multiple other projects on parental attitudes toward school choice that Tyton Partners has conducted over the years, including, notably, *Choose to Learn* and *School Disrupted*.

Our analysis highlights the need for additional support for low-income families to access the same opportunities as their higher-income counterparts. We identify ways ESA programs can raise awareness and trust among both parents and providers; improve access to education solutions that meet families' needs; make programs more usable, especially for low-income students; and increase access to data for both educators and parents so that they can get the information they need to make informed decisions.

The potential large-scale impact of ESAs on the American education system necessitates a comprehensive understanding of the current state of ESA programs, an eye toward their impact on student performance and outcomes, and a steadfast commitment to implementation that upholds principles of equity. Only through such meticulous efforts can we uncover the best ways to improve our education system.

6. Including Arkansas, Montana, South Carolina, and Utah, whose ESA programs will launch in Fall 2024; North Carolina's eligibility numbers are calculated based on universal eligibility, which will go into effect Fall 2024

7. EdChoice. *School Choice Fast Facts*. [www.edchoice.org/school-choice/fast-facts](http://www.edchoice.org/school-choice/fast-facts)

8. In programs with universal eligibility, all school-aged children are eligible for ESAs, in contrast to more limited programs in which only specifically designated student populations, such as students with disabilities or students from low-income families, are eligible

# EXECUTIVE SUMMARY

*Paying for Choice* is written as a three-part series. Each part serves a distinct purpose, but all focus on the central question of if and how the ESA program can be used to drive equitable outcomes for students.

In this first part, we provide an orientation to the evolution of the school choice movement and give a more detailed overview of ESAs nationally and in Arizona and Florida particularly. We examine the history of ESAs, the growth in their popularity, and the policies that enable them, situating ESAs within the broader school choice movement. We also detail our framework for evaluating the impact and potential improvements to ESAs in Florida, Arizona, and other states, a framework we further develop in subsequent sections of this report. Key findings include the following:

- ESAs, despite being a more recent school-choice funding mechanism, have rapidly grown both in terms of student eligibility and enrollment, especially since the start of the COVID-19 pandemic.
  - ESA coverage grew to 2.2 million eligible students nationwide between 2011 and 2021; it has grown exponentially since and will cover roughly 10.2 million children—i.e., ~20% of the U.S. K-12 student population—in 13 states in 2024.
  - Similarly, enrollment in ESAs grew gradually, reaching ~30,000 enrolled students in 2021, before more than tripling enrollment nearly overnight on the tail end of the pandemic.
- ESA programs are complex, involving multiple critical stakeholders with sometimes overlapping or contradictory interests. This multifaceted ecosystem is rendered even more challenging by the diversity of implementation approaches, policy contexts, and other fundamental characteristics that vary across states.
- One noteworthy structural difference between states' ESA programs is the “openness” of the marketplaces dictated by a state's policy framework.
  - Arizona has a more “open” marketplace for providers, allowing nearly any provider to register.
  - Conversely, Florida has a more “closed” or curated ecosystem in which providers must first apply and be approved.
- Four critical pillars serve as the foundation for the success of ESA programs:
  - Awareness & Trust
  - Accessibility
  - Usability
  - Transparency

Although these pillars emerged from our analysis of Arizona and Florida, we believe they hold broad applicability to educational initiatives nationwide. Our analysis of parent and provider attitudes in Parts 2 and 3 of this report revolves around these pillars.

In Part 2, we take a close look at why and how parents make decisions about enrolling their children in alternative education programs and how providers make decisions about accepting public funds. We then assess the general level of awareness and trust that both parents and providers have toward ESAs and explore opportunities for improvement.

Part 3 picks up where Part 2 leaves off, asking, “How accessible and usable do potential participants—both parents and providers—find ESA programs to be, and what can be done to improve this access to make sure that ESAs are driving equitable opportunities?” This edition highlights administrative pain points parents and providers experience with ESAs and potential improvements that can ensure no stakeholders are left behind as they navigate the program. We conclude Part 3 with a set of recommendations for increasing the transparency of data available to parents, providers, and researchers about ESA programs in Arizona, in Florida, and nationwide.

# THE EVOLUTION AND POLARIZATION OF SCHOOL CHOICE

Understanding the potential impact of ESA programs requires looking at the evolution of the school choice movement that preceded and contributed to its introduction.<sup>9</sup> There are several variants of school choice, encompassing a diverse array of programs that offer students opportunities in alternative educational settings. The funding mechanisms for these programs vary.

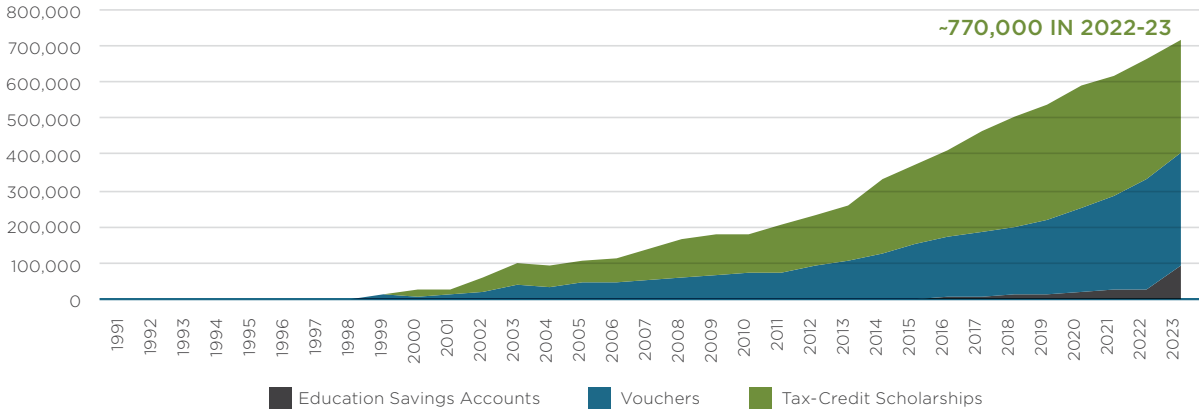
In the early stages of the school choice movement, states introduced tuition vouchers, which redirect public school resources to subsidize lower-income students' attendance at traditional private schools and are paid directly to the school. Introduced later, tax-credit scholarships, currently available in 22 states, offer tax credits to both individuals and corporations to incentivize contributions to organizations that fund private school scholarships for low-income students.

The newest funding mechanism, education savings accounts (ESAs), originated in Arizona in 2011. With ESAs, state governments allocate a portion of the funds designated for a child's public education to a specialized account controlled by parents. The specific administration and allowable expenses for ESAs vary by state, and participation generally necessitates the withdrawal of the student from public school.

Since their introduction in the early 1990s, school choice programs have grown gradually and then suddenly, from approximately 100,000 direct beneficiaries in 2006 to 770,000 students in 2022-2023 (see *Figure 2*).

Figure 2

Number of ESAs, vouchers, and tax-credit scholarships used in the U.S.<sup>10</sup>



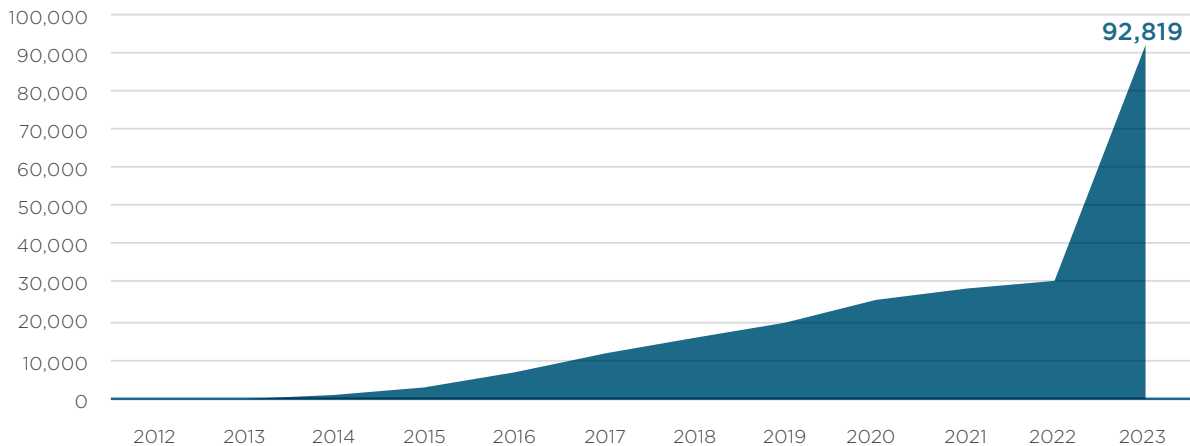
9. In this report, we distinguish between public schools and choice schools. Choice schools include private schools, parochial schools, microschoools, and homeschooling. While ESAs can also be used to pay for after-school programs and other programs that are not full-day school options, our research has focused on full-day options because that is how most families currently use ESAs.

10. EdChoice, *Op. cit.*

In the past few years, ESAs have been a contributor to this growth, gradually reaching ~30,000 enrolled students in 2022, their tenth year of existence, and then tripling enrollment nearly overnight on the tail end of the pandemic (see *Figure 3*).

*Figure 3*

### The number of students nationwide using ESAs has tripled since the start of the pandemic<sup>11</sup>



Advocates of school choice emphasize the inadequacies they perceive in the traditional public school system. They argue that affording families the autonomy to tailor learning experiences to their children's unique needs is key to educational progress.<sup>12</sup> Conversely, critics express concerns that school choice may potentially place less-resourced parents in the pivotal role of shaping their children's education.<sup>13</sup>

The discourse surrounding school choice and ESAs is notably charged. Generally, the programs are passed through Republican-controlled legislatures and executive branches. Of the 13 states actively implementing ESAs, Arizona and North Carolina currently stand as exceptions with Democratic governors.<sup>14</sup>

11. EdChoice, *Op. cit.*

12. American Federation for Students. *School Choice in America*. [www.federationforchildren.org/school-choice-in-america](http://www.federationforchildren.org/school-choice-in-america)

13. Save Our Schools Arizona. *The Truth about ESA Vouchers*. [sosarizona.org/the-truth-about-esa-vouchers](http://sosarizona.org/the-truth-about-esa-vouchers)

14. Office of the Governor Katie Hobbs. (2023, July 25). Governor Katie Hobbs Statement on New School Voucher Cost Projections. <https://azgovernor.gov/office-arizona-governor/news/2023/07/governor-katie-hobbs-statement-new-school-voucher-cost>

# ESA PROGRAMS: AN EVOLUTION IN FUNDING SCHOOL CHOICE

Arizona’s introduction of ESAs marked the beginning of a rapidly growing sector.<sup>15</sup> Since its launch, 12 other states have adopted ESAs, six of which are termed “universal programs,” opening up eligibility to all students.<sup>16</sup> Notably, during our report’s development, North Carolina expanded the eligibility for its ESA initiative, adding roughly an additional 1.7 million eligible students.<sup>17</sup> Though we are still in a period of relative infancy in understanding the impact of ESAs, their prevalence is rising, making now a good time to scrutinize the parent and provider dynamics within the ecosystem to inform their evolution.

States with ESA initiatives have diverse eligibility criteria, targeting special-needs students, low-income families, and other vulnerable demographics. Arizona’s Empowerment Scholarship Account originally catered to specific groups like military families and students with special needs.

Figure 4

State ESA Programs Overview (Arizona - North Carolina)

STATE	YEAR ESA ENACTED	ELIGIBILITY (AS OF 2023-2024)	ESTIMATED # OF ELIGIBLE STUDENTS (AS OF 2023-2024)	ELIGIBLE STUDENTS AS PERCENT OF ALL STUDENTS IN STATE	PARTY OF LEGISLATURE (2023)	PARTY OF GOVERNOR’S OFFICE
Arizona	2011	Universal <sup>18</sup>	1.4M	100%	Republican	Democratic <sup>19</sup>
Florida (FES-UA)	2014	Limited	300K	10%	Republican	Republican
Mississippi	2015	Limited	30K	6%	Republican	Republican
Florida (FES-EO)	2019	Universal <sup>20</sup>	3.3M	100%	Republican	Republican
Tennessee	2019	Limited	200K	68% <sup>21</sup>	Republican	Republican
New Hampshire	2021	Limited	60K	30%	Republican	Republican
Indiana	2021	Limited	200K	14%	Republican	Republican
North Carolina	2021	Universal <sup>22</sup>	1.9M	100%	Republican	Democratic

15. EdChoice, *Op. cit.*

16. Stanford, L. & Lieberman, M. (2023, March 27). *Education Savings Accounts, Explained*. EducationWeek. [www.edweek.org/policy-politics/education-savings-accounts-explained/2023/03](http://www.edweek.org/policy-politics/education-savings-accounts-explained/2023/03) (North Carolina has passed universal ESA since the article was written)

17. Jacobson *Op. cit.*

18. Arizona’s ESA program became universal in 2022

19. During the years that Arizona’s ESA program passed and later became universal, the state had a Republican governor

20. Florida’s FES-EO program became universal in 2023

21. Percentage of students in Chattanooga, Memphis, and Nashville only

22. North Carolina passed universal eligibility for its ESA program in September 2023, but the universality will not go into effect until 2024

Figure 4 (cont.)

### State ESA Programs Overview (West Virginia - Utah)

STATE	YEAR ESA ENACTED	ELIGIBILITY (AS OF 2023-2024)	ESTIMATED # OF ELIGIBLE STUDENTS (AS OF 2023-2024)	ELIGIBLE STUDENTS AS PERCENT OF ALL STUDENTS IN STATE	PARTY OF LEGISLATURE (2023)	PARTY OF GOVERNOR'S OFFICE
West Virginia	2021	Universal	300K	100%	Republican	Republican
Iowa	2023	Universal	600K	100%	Republican	Republican
Arkansas	2023*	Not yet launched (will be universal)	500K	100%	Republican	Republican
Montana	2023*	Not yet launched (will be limited)	20K	-12%	Republican	Republican
South Carolina	2023*	Limited	600K	-71%	Republican	Republican
Utah	2023*	Universal	700K	100%	Republican	Republican
<b>TOTAL</b>			<b>10.2M</b>	<b>63%</b>		

\* Program will launch in 2024

Florida boasts the largest ESA program in the nation: the Family Empowerment Scholarship (FES). It comprises two branches:

- The Unique Abilities program (FES-UA), initiated in 2014, serves students aged three to 22 with an individualized education program (IEP) or a certified disability.<sup>23</sup> More than 69,000 students participated in the FES-UA program during the 2022-2023 school year out of roughly 333,000 eligible.
- The Educational Options program (FES-EO), launched in 2019, extends to all Florida residents in K-12. Priority is given to households at or below 185% of the federal poverty level, as well as those in foster care. Students with household incomes between 185% and 400% of the federal poverty level receive secondary consideration. During the 2021-2022 school year, 83,700 students out of the 3.3 million eligible participated in the program.

23. Under United States law, an IEP is a legal document that is developed for each public-school child who requires special education. It is created by a team that includes the child's guardians and district personnel most knowledgeable about the child's needs







# A COMPLEX ECOSYSTEM OF STAKEHOLDERS

Despite their seemingly straightforward financing mechanism, ESAs are complex, involving multiple stakeholders and a diversity of implementation approaches and policy contexts. In seeking to understand how ESA programs can better serve all students, it is crucial to understand which levers are malleable and which are fixed, as well as the roles played by various stakeholders.

Our research identified six stakeholder groups (see *Figure 5*) as critical actors in determining the success of a state's ESA program.

*Figure 5*

## Goals, constraints, and key jobs to be done for key ESA stakeholders

	<b>Definition</b> – Who makes up the stakeholder group?	<b>Goals</b> – What do they aim to achieve for/ through the ESA program?	<b>Constraints</b> – What limits their actions and behaviors?	<b>Key jobs to be done</b> – What are the main points of responsibility/ authority?
 <b>POLICYMAKER</b>	Group responsible for crafting and passing ESA policy	Meet public's educational needs	Political environment it operates within	Write ESA policies
 <b>ADMINISTRATIVE PARTNER</b>	State body responsible for operationalizing ESA policy	Actively implement the ESA policy passed	<ul style="list-style-type: none"> <li>• ESA policy statutes</li> <li>• Internal capacity</li> </ul>	<ul style="list-style-type: none"> <li>• Action ESA policies</li> <li>• Disseminate information about the ESA program, benefits, and best practices</li> <li>• Administer ESA program from application to payment</li> <li>• Provide support to families and providers using ESAs</li> </ul>
 <b>PLATFORM PARTNER</b>	Organization(s) responsible for upkeeping technology that enables ESA ecosystem	Work with administrative partner to perform implementation	<ul style="list-style-type: none"> <li>• Administrative partner's management</li> <li>• Internal capacity</li> </ul>	
 <b>NAVIGATORS</b>	Organizations that help parents and providers participate in ESA program	Facilitate access and information/ resources to end ESA users	Authority/ recognition by other ESA stakeholders	
 <b>PROVIDERS</b>	Schools, education programs, and vendors providing services and products that ESA funds can be used for	Maximize student/ consumer reach	<ul style="list-style-type: none"> <li>• Compliance requirements</li> <li>• Internal capacity and resources</li> </ul>	Participate in ESA
 <b>FAMILIES</b>	Parents and their school-aged children who participate in the ESA program	Ensure children receive a quality education that fits their needs	<ul style="list-style-type: none"> <li>• Access to information</li> <li>• Internal capacity and resources</li> </ul>	

The number of stakeholders and their intersecting interests is further complicated by the blurred lines between them and the roles they play in ensuring the success of ESA programs. As one executive at a platform partner told us, “A big issue is that there is not enough clarity around roles. There needs to be a discussion in terms of what exactly should state departments do, and what should they outsource.”

The novelty of ESAs is an additional complicating factor. Getting new programs off the ground requires constant learning and feedback loops between the stakeholders involved. A policy director focused on national K-12 issues shared, “There’s an issue of continuous learning and improvement where no one has really run these programs at this scale before.”

This type of learning takes time with any program, but learning across programs from one state to another is further impeded by the variability in policy frameworks, program maturity, and schooling structure in different states. Arizona and Florida have similarities in the maturity of their ESA programs. However, one noteworthy foundational difference is the “openness” of the marketplaces their ESA policy enables.

Arizona’s “open” marketplace for providers contrasts with the more “closed” ecosystem approach in Florida. There are tradeoffs to each approach. Open marketplaces allow for a stronger alignment between parents and providers but make quality control more difficult. Conversely, closed marketplaces allow for greater oversight and control of the system but can lead to higher administrative costs, unmet demand, and parent dissatisfaction.

# FOUNDATIONAL PILLARS: WHAT ARE THE KEYS TO SUCCESS FOR ESA PROGRAMS?

Our comprehensive research on ESA programs revealed four pillars that serve as the foundation for their success (see *Figure 6*).

*Figure 6*

## Four foundational pillars for ESA program success



Although these pillars emerged from our analysis of Arizona and Florida’s programs, we believe they hold broad applicability to ESA initiatives nationwide. We find, respective to each of the pillars, the following to be true:

- 1. Awareness & Trust:** For informed decisions, both parents and providers need a fundamental grasp of the program, its potential advantages, and confidence in its effectiveness and longevity.
- 2. Accessibility:** Recognizing that not all participants have equal access to the resources required for program involvement, barriers to entry should be minimized for the most vulnerable student populations. This ensures maximum accessibility, particularly for those with fewer resources.
- 3. Usability:** Once parents and providers commit to participation, administrative complexities, such as application processes and fund management, should be streamlined without compromising accountability.
- 4. Transparency:** Access to information is crucial both for parents and providers interested in ESAs, as well as for researchers and advocates. Parents want—and need—to be able to easily access credible information about the quality of programs in their area, for example, knowing what other parents think of those providers. Likewise, providers ask for better data on how many families are interested in programs like theirs so they can increase access in line with demand. Finally, as a publicly funded program, striking the right balance between flexibility for families and

collecting data on program performance is crucial. Stakeholders across the ecosystem, from policymakers to administrative partners to providers, need access to unbiased, longitudinal data to be able to enact improvements that better meet the needs of all students, especially those from low-income backgrounds.

In Part 2 and Part 3 of this report, we delve deeper into each pillar to detail the current behaviors and perspectives of parents and providers that are shaping their ESA experiences and the broader success of the program. From there, we explore potential improvement opportunities that can support the program's objectives of improving education outcomes for all students. The goal of our analysis is to offer a data-based perspective on relative strengths and challenges in two of the most mature ESA states—Arizona and Florida—so that their programs can best serve all students, particularly those with the greatest need, and provide insights to stakeholders in states with new and developing initiatives.

Stakeholders must insist, and funders should help to enable greater research into the impact of ESA programs on student outcomes. Advocates for ESAs should promote objective, longitudinal research that will help to evaluate the program's core thesis: that giving parents and students the ability to pursue the educational approaches that best suit their needs leads to better learning outcomes for students and society alike.

# APPENDIX

## THANKS AND ACKNOWLEDGMENT

We are grateful to the 11 members of the ESA advisory board who provided market knowledge and helped to sharpen our thinking.

### Advisory board members



**JIM BLEW**  
*Cofounder,*  
Defense of Freedom  
Institute for Policy  
Studies; Senior Director  
of Government Affairs,  
ClassWallet



**JENNY CLARK**  
*Founder and*  
*Executive Director,*  
Love Your School



**BEN DEGROW**  
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Education Choice,  
Excel in Ed



**COLLEEN DIPPEL**  
*CEO, Families*  
*Empowered*



**ROBERT ENLOW**  
*President and CEO,*  
Ed Choice



**KURTIS INDORF**  
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**MATT LADNER**  
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Opinions expressed in this report remain those of Tyton Partners alone and do not necessarily reflect the opinions of our Advisory Board, study participants, or funders.

Thank you to our graphic designer, Andy Sherman of [Can of Creative](#), whose creativity and guidance were critical to driving the execution of this publication.

Finally, we want to express appreciation for the more than 1,200 parents and more than 180 providers who responded to our surveys and engaged with us in interviews and focus groups. Our work was informed and guided by the school administrators, education advocacy leaders, and policy experts that we interviewed during this process.

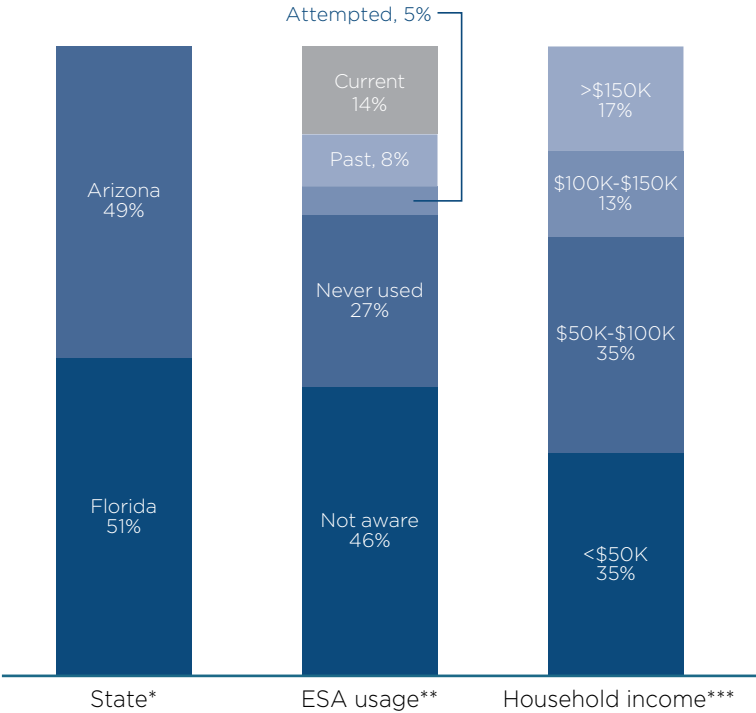
# SURVEY METHODOLOGY

Tyton Partners conducted extensive research to collect data on parents' attitudes and beliefs regarding their children's education and ESAs. Our primary research, conducted throughout May and June of 2023, includes a survey of more than 1,200 PreK-12 parents and nearly 180 choice providers in Arizona and Florida.

## PREK-12 PARENT SURVEY

Parents are core influencers and decision-makers in their children's educational experience. To best understand how and why families make educational choices, Tyton gathered input from a diverse sample of PreK-12 parents. Parents focused on one child throughout the survey, and we set targets to ensure appropriate levels of representation relative to the demographics in Arizona and Florida.

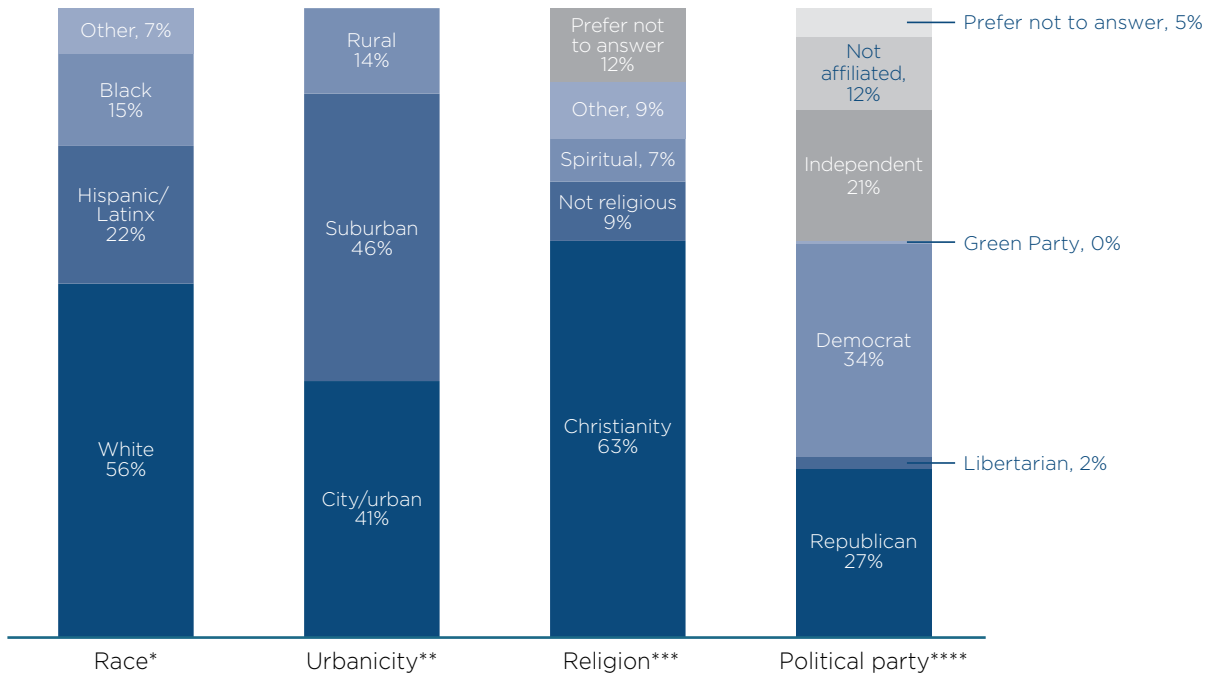
Parent survey demographics



Notes: All data in graph is n=1,224. \*Survey question: "In which state do you and your child live?"; \*\*Survey question: "Prior to today, were you aware of your state's ESA (Empowerment Scholarship Account in AZ, Family Empowerment Scholarship in FL) program?"; \*\*\*Survey question: "What is your estimated total annual household income?"

Sources: Tyton Partners Parent ESA 2023 Survey, Tyton Partners analysis

## Parent survey demographics (cont.)



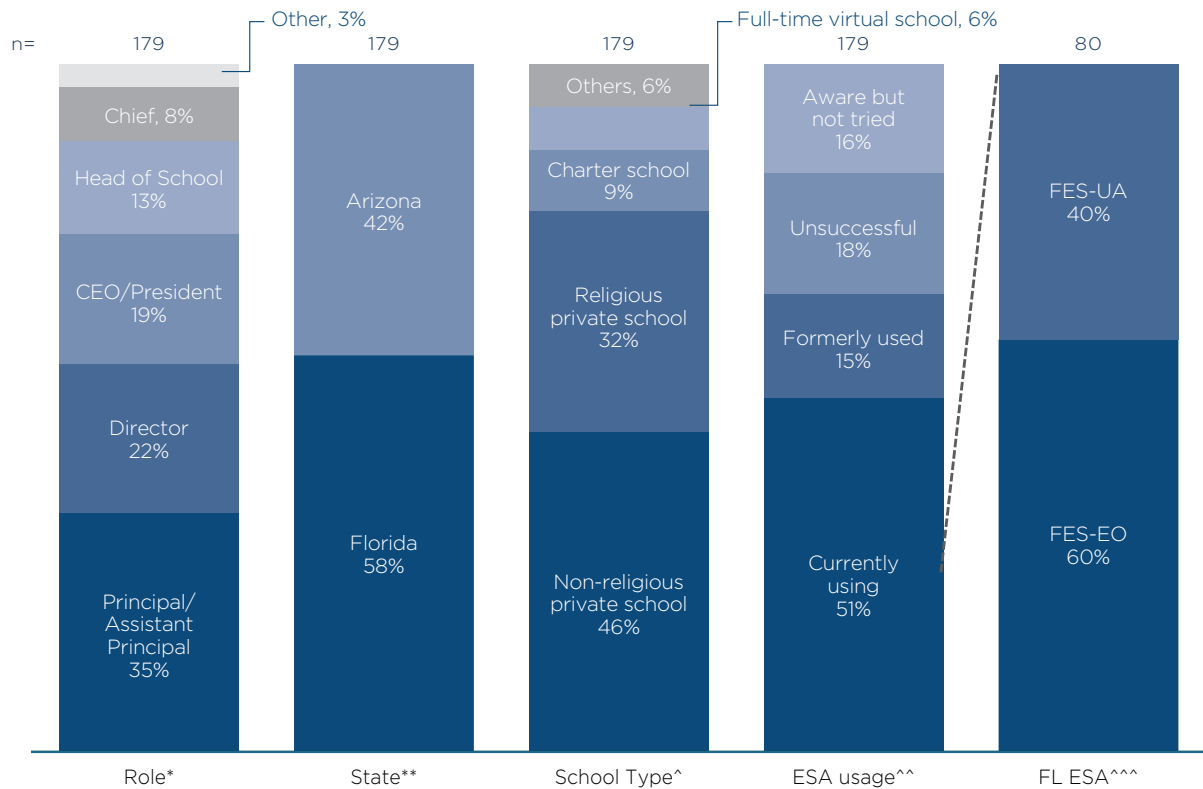
Notes: All data in graph is n=1,224. \*Survey question: "Which of the following do you identify with? Select all that apply."; \*\*Survey question: "Which of the following best describes the community in which you live?"; \*\*\*Survey question: "Which religion do you identify with?"; \*\*\*\*Survey question: "What political party do you generally support?"

Sources: Tyton Partners Parent ESA 2023 Survey, Tyton Partners analysis

## CHOICE PROVIDER SURVEY

Our survey of nearly 180 organizational leaders allowed for a deeper investigation into the motivations and obstacles for choice providers that provide the services to meet parent demand. The scope of our research was focused on full-time alternatives to public schools, with representation across choice school types, states, and experience with the ESA program.

### Provider survey demographics



Notes: All data in graph is n=179. \*Survey question: "Which of the following best describes your primary role?"; n=179, Other includes superintendent/assistant superintendent (3%), others (please specify) (1%); \*\*Survey question: "In which state is your academic institution located? If you operate across multiple states, please select all that apply."; n=179; ^Survey question: "In which type of academic institution do you currently work?"; n=179, Others include micro schools (3%), supplemental educational provider (2%) and others (please specify) (1%); ^^Survey question: "Which of the following best describes your current academic institution's acceptance of ESAs?"; n=179; ^^^Survey question: "In the state of Florida, which ESA programs do you currently accept funds from? Please select all that apply."; n=80

Sources: Tyton Partners Provider ESA 2023 Survey, Tyton Partners analysis

# ABOUT TYTON PARTNERS

Tyton Partners is the leading provider of strategy consulting and investment banking 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](https://tytonpartners.com).

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