As a leader, the decisions you make are only as good as the data you have, and that data is constantly changing. An increasingly competitive market requires spotting and understanding trends, which is more important than ever this year. At The Enrollment Management Association (EMA), we monitor applications submitted to independent schools month-to-month and year-over-year using our Standard Application Online (SAO) to spot trends and provide guidance to independent school leaders so they can make informed decisions for the upcoming admission season and beyond. In our January

Understanding Application Trends
2021 analysis, we reviewed applications by month and groupings to look for trends over the last year. We included schools that used the SAO in both 2020 and 2021 application seasons and also used them in a consistent manner. These schools received at least one submitted application. The total number of schools reviewed was 307, while the number of applications was 40,523 by January 31, 2021. From our analysis, we see a wave pattern in applications with an uptick from September through November 2020 and a slump in December before rising again in January 2021. International applications, those outside the United States and Canada, fared the worst, particularly in the Asian group. Postgraduate applications fared the best, followed by first, 11th, and 12th grades.

Over the course of the last six years, China has been the number one home country of international students, but those numbers have declined from 68% in 2016 to 51% in 2021. During that time period, applications from South Korea, Canada, and Hong Kong have increased 2% and applications from Mexico increased 1%. Applications from “Other” countries and regions have risen from 17% in 2016 to 25% in 2021, while applications from Vietnam have steadily declined with the exception of a slight increase in 2018.

In our analysis, the breakdown of day school vs. boarding school applications is 27% day and 73% boarding. In the last year, applications for both types decreased by 11% overall, but the hardest hit month was September with full pay applications dropping by 32% and financial aid applications dropping by 23%. This decrease may have a correlation with the drop of international applicants.

Looking at the data from a country perspective, China and Vietnam fared the worst with applications dropping nearly or more than 50%. Applications in other countries suffered a decrease of between 15% and 31%, except for Mexico where applications actually increased by 14%.

OF ADULTS REPORT THAT THEY PERSONALLY WERE LAID OFF OR LOST THEIR JOBS BECAUSE OF THE CORONAVIRUS OUTBREAK. THIS CREATES A LOT OF QUESTIONS AROUND WHAT FAMILIES MIGHT EXPECT OR NEED IN THE COMING YEAR AND HOW SCHOOLS SHOULD PREPARE TO FILL THOSE REQUESTS.

TO UNDERSTAND THE SPECIFIC CHANGES, WE LOOKED IN DEPTH AT THE FOLLOWING BREAKDOWNS:

Total Group

Compared to 2020, our findings indicate that total applications were down 11% overall. While there seemed to be an improvement month-to-month from September to November, applications took a hit in December, plummeting down 16%. Volume improved in January 2021 and ended at a loss of 8%.

Domestic vs. International

The application pool is comprised of 68% domestic and 32% international students. Not surprisingly due to issues and travel restrictions around COVID, international applications were more affected in 2020 than domestic applications. Overall, domestic applications increased by 1% compared to a 28% decrease in international applications.

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Day vs. Boarding Schools

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Applicants’ Ethnicity

Looking at the ethnicity of applicants, we see the two largest groups are White at 38% and Asian at 34%. While most ethnicities remained fairly stable overall, they all took a tumble in September with the exception of the Latino group, which actually saw an increase of 5%. By the end of the year, White, Black, and Multiracial groups had small variations; Latino applications were up 1%, and Asian applications were down 27%.

Grade

Decreases were felt across all grade levels with applications for pre-K to 12 down between -11% and -20% over the last year. One anomaly was the fluctuation in pre-K to fifth grades. As a whole, this group was -16% overall, and down between -33% to -8% as individual grades with the exception of first grade, which was up 4%. For upper grades, they were -11% overall, but the decrease was felt in ninth and 10th grades with -14% and -12% respectively, while 11th and 12th grades were at 10% and 9% respectively. +

For the full report, visit: learn.enrollment.org/research