How Has COVID-19 Affected Applications to Independent Schools

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Abstract

The outbreak of COVID-19 has resulted in uncertainty in the admissions and enrollment processes of independent schools. The Enrollment Management Association (EMA) analyzed the empirical application data submitted via the Standard Application Online (SAO) over the past five years and compared the 2020 data to that historical trend, focusing on March through August. The results showed that overall, more families applied to independent schools in 2020 than in 2019. Although there were fewer applications from March to May in 2020 as compared to 2019, applications increased from June to August. The application trend was analyzed at a variety of subgroup levels as well, including domestic vs. international applicants, applications to day schools vs. boarding schools, applications with financial aid requests vs. without, applications from public school students vs. independent school students, and applications from different ethnic groups.
How Has COVID-19 Affected Applications to Independent Schools

In February 2020, the SSAT administration was canceled in mainland China, South Korea, Japan, and Hong Kong due to the outbreak of COVID-19 in those regions. The independent school application process was consequently disrupted for international students. At that point, many independent school admissions officers started to worry about how to recruit international students who did not have access to standardized testing and how the disruption would impact schools’ 2020–21 enrollment.

The outbreak in East Asia soon turned out to be just a prelude to a global pandemic: Schools across the United States and the world were closed, families could not maintain tuition payments due to changes to their financial situations, projections for international student enrollment in independent schools for the 2020–21 school year were substantially reduced, and the SSAT spring administrations were canceled worldwide, along with many other changes to the educational landscape. The prospects for 2020–21 enrollment were dim at that point.

During the late spring and early summer, however, things started to change. Summer is usually a quiet time for most independent schools, but certainly not for the summer of 2020. Multiple media reports documented the spike in application and enrollment in independent schools. To get a closer look at the picture, The Enrollment Management Association (EMA) analyzed the application trend from March through August over the past five years and compared the 2020 data to that historical trend.

Overall Applications From March Through August – Total Group

The total number of yearly applications from 2016 to 2020 are presented in Table 1. The total applications were further broken down by each quarter: fall (September–November), winter
(December–February), spring (March–May), and summer (June–August). Table 1 shows that in the 2019–20 admission cycle, the overall number of applications increased from 51,456 in 2019 to 57,703 in 2020, an increase of 12% (middle panel). The middle panel also contains the year-over-year percent growth in quarterly application. In general, applications have increased each year in winter (Dec–Feb), spring (Mar–May), and summer (June–Aug) from 2016 through 2019. The year 2020, however, exhibited a different pattern. While there was a 16% increase in the winter quarter (Dec–Feb) applications from 2019 to 2020, which aligned with the historical trend, the volume dropped in the spring (Mar–May), down 7% from the previous year. In the summer quarter (Jun–Aug), applications rebounded, increasing 63% compared to 2019.

The lower panel in Table 1 contains the percent of total yearly applications by quarter. For example, fall application was 33% in 2016 but reduced to 18% in 2020. What is noticeable is that the summer (Jun–Aug) 2020 applications jumped to 7% of the total, whereas summer applications in 2019 made up only 5% of the total. In previous years, an even smaller percentage of applications arrived during the summer. The applications in summer 2020 clearly surpassed the historical trend.

The spring and summer applications were further examined on a monthly basis from March through August. The results are displayed in Figure 1. Figure 2 shows the year-over-year variation by month, represented as percent growth from the previous year. For example, the March 2020 variation in Figure 2 shows the percent growth in SAO applications from March 2019 to March 2020.\(^1\) A positive percentage indicates an increase, while a negative percentage indicates a decrease. The 2019–20 comparison is indicated by the bars to the far right in each monthly cluster.

\(^1\) March 2020 Variation = 100% \(\times\) \(\frac{(#March2020\ SAO\ apps\ -\ #March2019\ SAO\ apps)}{#March\ 2019\ SAO\ apps}\)
As can be seen from both Figures 1 and 2, the number of applications in each month steadily increased from 2016 to 2019. However, note that in 2020, the March, April, and May applications dropped below the 2019 level. By June 2020, the application rate had recovered, surpassing the June 2019 volume by 35%. The volume continued to grow in July and August, increasing 85% and 73% over the corresponding months for 2019. Historically, the number of applications has decreased from April through August. This was certainly not the case in 2020. During the summer, monthly applications maintained a high level, even increasing substantially from June to July.

Blackbaud examined application data in its Enrollment Management System. The main finding was similar: Private school application numbers surged in June and July compared to 2019, with July seeing a 131% increase over July 2019. The spike in applications during the late spring and summer was largely due to parents’ exploring alternatives to remote learning. Myra McGovern, Vice President of Media for the National Association of Independent Schools (NAIS), noted, “Anecdotally, I have heard that quite a few schools have experienced an influx in inquiries…” (see Uncertainty looms over private school enrollment because of COVID-19) These inquiries were quite likely from parents attempting to find out if the schools would have in-person instruction in the fall.

According to NAIS’s Reopening and Tuition Plan for 2020–2021 survey issued on July 27, 40% of private schools were planning to start the fall with in-person learning, 19% were preparing for distance learning, and 41% were going to offer a hybrid model. The Center on Reinventing Public Education surveyed public school districts’ reopening plans. The survey results indicated that 49% of districts planned to restart school fully in-person, 26% would start fully remote, and another 12% would start in a hybrid model. However,
there is a large rural-urban divide: While 65% of rural districts planned to start fully in-person this fall, only 24% of suburban districts and 9% of urban districts planned to do so.

A New York Times article published in mid-August revealed a phenomenon across the country: *In the Same Towns, Private Schools Are Reopening While Public Schools Are Not.* The key reason, according to the article, is money.

“Public schools, which serve roughly 90 percent of American children, tend to have less money, larger class sizes and less flexibility to make changes to things like the curriculum, facilities or work force.”

*Time magazine reported* that more parents across the country are choosing private schools for their children during the pandemic because of “small class sizes and large outdoor spaces that make social distancing easier, in addition to endowments and donations that have made it possible to upgrade air filtration systems, revamp nurses’ offices, set up tented classrooms outside, secure COVID-19 testing and hire more staff.”

Here is a quick sampling of private schools that experienced a surge in applications and/or enrollment:

- In Boston, Massachusetts, South Boston Catholic Academy saw a surge in enrollment with many new students transferring from Boston Public Schools and others wait-listed, according to *CBS Boston*.

- In Richmond, Virginia, a number of private schools, many of which have committed to hold in-person classes, reported an uptick in applications in recent months since public schools began making moves toward virtual-only classes, *Richmond Bizsense* reports.

- Bosque School in Albuquerque, New Mexico, saw a major increase in summer applications, per *KRQE News 13*. 
The list can go on and on. The 85% application increase in July and 73% increase in August vividly depicts a picture of families trying to catch the last train to in-person education for their children.

In the following sections, the application data are examined at subgroup levels, including domestic vs. international, applicants applying to day schools vs. boarding schools, applicants applying for financial aid vs. full pay, applicants’ current school types, and ethnicity groups.

Applications From March Through August — Subgroups

Domestic vs. International. In this section, the applications from domestic and international applicants were examined separately. The two panels in Figure 3 show the number of applications from domestic and international applicants, respectively. Figure 4 displays the comparison between domestic and international applicants, and the variations of each group compared to the same time frame in 2019.

As can be seen from Figures 3 and 4, there were fewer March domestic applications in 2020 than in 2019, but April and May 2020 application levels were on a par with 2019. In June 2020, applications surged to nearly 1,000. From July through August, the applications numbered around 1,200, roughly double the number from the year before.

International applications, on the other hand, exhibited an opposite pattern. The March and April 2020 volumes were not affected too much, with only a slight drop from the previous year. There was a sharp decrease from April to May, and this downward trend continued throughout the rest of the spring and summer. In each month, the volume decreased around 30% compared to 2019. In August, the volume dropped more than 40% compared to the previous year.
The drop in international applications was very likely related to a series of U.S. policy changes regarding international students (this, in addition to the not very well controlled COVID-19 situation in the United States). EMA and Finding School co-conducted a survey in May, analyzing the changes and trends in the willingness of Chinese families to send their children to study abroad (Finding School & EMA, 2020). The survey results revealed that approximately 40% of the families indicated that they are not planning to apply to a school overseas. Another survey conducted by the Bondad International Education Media also showed that out of the 465 Chinese families that had plans to send a child abroad to study prior to the pandemic, 30% have decided against studying abroad (Shang Nancy Friends, 2020). As most Chinese families usually would have chosen a U.S. school if they had planned to study abroad, the drop of 30%–40% in applications was aligned with survey results.

**Applying to day schools vs. boarding schools.** What was the pattern of applications to day schools? To boarding schools? Figures 5 and 6 show that early spring applications to boarding schools outpaced applications to day schools during the same period, as has historically been the case. Day school applications exhibited a very clear upward pattern throughout the late spring and summer, however, whereas the number of applications to boarding schools was very close to historic trends (although there was a slight increase during the summer months over previous years’ volumes).

**Financial aid vs. full pay.** Applications accompanied by requests for financial aid vs. applications submitted with the intention to pay full tuition are analyzed in this section. The information is presented in Figures 7 and 8. Again, the two groups showed a different pattern. While financial aid and full pay applications both dropped slightly in March, the former jumped 25% in April whereas the latter continued to fall (to a larger degree). In May, financial aid
applications were at the same level as 2019, but full pay applications continued to decline until they were below the 2018 level. Both groups showed renewed application activity in June, with applications for the month exceeding 2019 levels. Volumes continued to grow in July and August.

Figure 8 reveals that there were more full pay than financial aid applications from March through August. While the difference between the two groups was relatively constant, there was a large difference in July corresponding to a surge in full pay applications.

*Application by applicants’ current school type.* Applicants come from a variety of schools: public schools within the United States and Canada, private/independent schools within the United States and Canada, American international schools outside of both countries, charter schools, home schools, and so on. Due to small sample sizes, only applications from students in public or private/independent schools within the United States and Canada are reported here.

Figure 9 shows that the applications from public school students within the United States and Canada were relatively stable from March to May of 2020, showing small or moderate variations from 2019. Applications from public school students rose sharply and continuously throughout the summer months, eventually almost doubling the 2019 volume. Applications from private schools remained fairly stable from March through August, with the exception of a slight increase in July.

Figure 9 shows that historically, more applications to independent schools have been from those students in private/independent school than those students from public school. Figure 10 shows that for 2020, applications were fairly evenly split between the two groups for March and April. Despite a drop in applications from public school students in May, applications remained about evenly split between students from public and students from private schools
through June. Throughout the rest of the summer, applications from public school students continued to accelerate, while applications from private school students fell by more than 40% from July to August. In July, there were almost 200 more applications from public school students than from private schools students. In August, the number of applications from public school students exceeded the number of applications from private school students by more than 400 (more than doubling applications from private school students). This result agrees with the previous analyses indicating that parents were moving their children from public to private schools.

*Application by ethnicity groups.* Finally, we looked into applicants’ ethnic background. Given sample size limitations, we reported the following groups only: white, Asian, multi-racial, African American, and Latino/Mexican American.

As can be seen from Figure 11, in 2020, applications from Asian and African American groups decreased month over month, whereas applications from white, multi-racial, and Latino/Mexican American groups have generally increased over the same time period (from May/June to August for white or Latino/Mexican American applicants; or from March through August for multi-racial applicants). Compared to 2019, Asian applicants constituted the only group with either a lower number or a very trivial increase of applications from March through August. Other groups all showed substantial increases over 2019 at least from June through August.

Figure 12 indicates that among five groups, the white group had the most applications from March through August (except in April), followed by the Asian group. Applications from Asians exhibited a clear downward pattern, while applications from the white group were stable in spring and increased during the summer months.
Summary

The unusual application pattern in the spring and summer of 2020 was just a small reflection of a year full of unprecedented events. Our data showed that overall, more families applied to independent schools in 2020 than in 2019. The number of applications dropped from March to May but increased from June to August. Below is a list of findings at the subgroup level from June to August 2020 compared to 2019:

- Domestic applications increased, but international applications decreased.
- Applications to day schools and boarding schools both increased. While there were more applications to boarding schools, the percent increase in day school applications from June through August was much larger than for boarding schools.
- Applications with financial aid requests and those assuming full pay both increased. There were more full pay applications.
- Applications from public school students and private school students both increased. There were more applicants from public schools, especially toward the end of summer.
- At the ethnic group level, the Asian group did not exhibit large variations, whereas applications from white, multi-racial, African American, and Latino/Mexican American groups all went up substantially.

Still, it might be premature to conclude that independent school enrollment will increase. Other factors, such as families’ ability to pay tuition given changes in their financial situations and the loss of international students, will have impacts on enrollment. We need to continue to monitor how things unfold in the new school year.
Reference


Shang Nancy Friends (May 2020). *To go or not to go, that is the question* …. Shang Nancy Friends Dim Sum Digest.
Table 1

Applications submitted via SAO in fall/winter (Sep–Feb) and spring/summer (Mar–Aug)

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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<tr>
<td><strong>Number of Total Applications and by Quarter</strong></td>
<td></td>
<td></td>
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<tr>
<td>Yearly Applications</td>
<td>35,447</td>
<td>41,161</td>
<td>47,162</td>
<td>51,456</td>
<td>57,703</td>
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<tr>
<td>Sep–Nov</td>
<td>11,630</td>
<td>14,300</td>
<td>9,468</td>
<td>10,398</td>
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<tr>
<td>Dec–Feb</td>
<td>21,045</td>
<td>23,149</td>
<td>32,180</td>
<td>34,058</td>
<td>39,403</td>
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<tr>
<td>Mar–May</td>
<td>2,040</td>
<td>2,538</td>
<td>3,905</td>
<td>4,642</td>
<td>4,302</td>
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<tr>
<td>Jun–Aug</td>
<td>732</td>
<td>1,174</td>
<td>1,609</td>
<td>2,358</td>
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<td><strong>Year-Over-Year Growth</strong></td>
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<tr>
<td>Total volume</td>
<td>16%</td>
<td>15%</td>
<td>9%</td>
<td>12%</td>
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<tr>
<td>Sep–Nov</td>
<td>23%</td>
<td>-34%</td>
<td>10%</td>
<td>-2%</td>
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<tr>
<td>Dec–Feb</td>
<td>10%</td>
<td>39%</td>
<td>6%</td>
<td>16%</td>
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<tr>
<td>Mar–May</td>
<td>24%</td>
<td>54%</td>
<td>19%</td>
<td>-7%</td>
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<tr>
<td>Jun–Aug</td>
<td>60%</td>
<td>37%</td>
<td>47%</td>
<td><strong>63%</strong></td>
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<tr>
<td><strong>Percent of Total Yearly Applications by Quarter</strong></td>
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<tr>
<td>Sep–Nov</td>
<td>33%</td>
<td>35%</td>
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<td>Dec–Feb</td>
<td>59%</td>
<td>56%</td>
<td>68%</td>
<td>66%</td>
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<tr>
<td>Mar–May</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Jun–Aug</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
<td><strong>7%</strong></td>
</tr>
</tbody>
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*Columns may not sum to 100% because of rounding.
Figure 1. Spring and Summer Standard Application Online (SAO) Trend Analysis — Total Group

Figure 2. 2020-2019 SAO Monthly Variation — Total Group
Figure 3. Spring and Summer Standard Application Online (SAO) Trend Analysis — Domestic vs. International
Figure 4. 2020-2019 SAO Monthly Variation — Domestic vs. International
Figure 5. Spring and Summer SAO Trend Analysis — Day School vs. Boarding School
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