Trend Analysis of Applications for School Year 2021–22: January 2021 Update

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Overview

The Enrollment Management Association (EMA) has been monitoring the number of applications submitted via the Standard Application Online (SAO) for school year 2021–22. We aim to release a monthly update in the hopes that the information will provide guidance to schools regarding the overall trend in this admissions and enrollment season.
Application Analysis by Month and Groups

- Total Group
- Domestic vs. International
- Day vs. Boarding School
- Financial Aid vs. Full Pay
- Applicants’ Current School Type
- Applicants’ Ethnicity
- Grade
Sample

- The analyses include schools that used the SAO in both 2020 and 2021 application seasons in a consistent way.

- Schools have received at least 1 submitted application.

- Total number of schools = 307
  Total number of applications = 40,523 by January 31, 2021
Total Applications Decreased 11% Through January 2021

Compared to last year:

- From Sept. through Jan., total applications were down 11%.
- Monthly variations: Things appeared to get better from Sept. to Nov., but applications took a deep hit in Dec., down 16%.
- The volume picked up again in Jan., with a loss of 8%.

![Graph showing total applications trend from September to January 2021 with specific percentages for each month: September -18%, October -2%, November -16%, December -8%, January -11%, Overall -28%.]
Section I
Domestic vs. International
Application Pool Composition:
68% Domestic vs. 32% International
Domestic Applications Increased 1%; International Applications Decreased 28%
Domestic Applications Were Up 1%; International Were Down 28%

- Overall, domestic applications increased 1% whereas international applications decreased 28%.
- Note that international applications dropped 20% in Jan., vs. the 38% drop in Dec. It seems that international numbers started to pick up.
International Application Trend—Country/Region Specific

- Applications from China and Vietnam dropped nearly or more than 50%.

- Applications from other countries/regions all have gone down between 15% and 30%, except from Mexico, where applications have increased 14%.
International Application Trend—Composition

- China has been the no. 1 home country of international students over the last 6 years.
- The percent of applications from China out of the total international applications, however, has decreased from 68% in 2016 to 51% in 2021.
- The percent of applications from “Other” countries and regions has risen from 17% in 2016 to 25% in 2021.
The lower cluster of the previous slide is extended in this chart.

The percentages of applications from South Korea, Canada, and Hong Kong have increased 2%–3%; Mexico has increased 1%.

The percentage of applications from Vietnam has been declining after the initial increase.
Section II
Day School vs. Boarding School
Application Pool Composition:
27% Day School vs. 73% Boarding School
Day School and Boarding School Applications Decreased 11%

-11% Day School applications decreased 11%
-11% Boarding School applications decreased 11%
Day School and Boarding School Applications Each Decreased 11%

- Overall, applications to day and boarding schools each decreased approximately 11%.

- Day Schools: After the deep loss in Sept., applications picked up quickly in Oct. (-10%) and Nov. (5%). In Dec., it turned south again (-21%) but gained in Jan.

- Boarding Schools: Applications were down close to or more than 20% in both Sept. and Oct. Applications gained momentum in Nov. and Jan.
Section III
Financial Aid vs. Full Pay
Application Pool Composition:
54% Full Pay vs. 44% Financial Aid

- Full Pay: 54%
- Financial Aid: 44%
- Missing Data: 2%
Applications Seeking Financial Aid Were Down 3%; Full Pay Applications Were Down 17%

-3% Applications with FA decreased 3%

-17% Full pay applications decreased 17%
Applications Seeking FA Decreased 3%; Full Pay Applications Decreased 17%

- Overall, applications with financial aid were down 3%; full pay applications were down 17%.

- Financial aid applications decreased 23% in Sept. and were stabilized with a drop between -6% and -4% from Oct. through Jan.; Nov. showed a 12% increase.

- Full pay applications decreased 32% in Sept. and around 25% in Oct. and Dec. Nov. and Jan. exhibited smaller deficits, around -10%. The decrease might be related to the drop of international applications.
Section IV

Applicants’ Current School Type
Applicants’ School Type: Public School 0%; Private School Down 2%; Schools Outside U.S. & Canada Down 34%

0% 
Applicants from **public schools** remained

-2% 
Applicants from **private schools** decreased 2%

-34% 
Applicants from schools outside of U.S. and Canada decreased 34%
Applications from Schools Within U.S. and Canada Were Relatively Stable, Within ±2%, but Tumbled from Outside U.S. and Canada, Down 34%

- Overall, applications from public school students were similar as last year, but dropped 2% from private school applicants.

- Applications from schools outside U.S. and Canada tumbled: -34%. However, compared to the 40% drop in Dec., the decrease of 27% in Jan. might be an indicator that international applications have started to pick up.
Section V
Ethnicity Group
Application Pool Composition: Ethnicity Group

- White: 38%
- Asian: 34%
- Black: 10%
- Multiracial: 5%
- Latino: 7%
- Prefer not to respond: 3%
- Other: 2%
Ethnicity

- 2% White
- -27% Asian
- -0% Black
- 11% Latino
Applications from Asian Students Down 27%, but Up 11% from Latino Students

- Almost all groups tumbled in Sept., except Latino.
- Applications from non-Asian groups picked up from Oct. through Jan.
- Asian: After the loss in Dec. (-35%), Jan. became a little better (-20%).

Overall:
- White: Stable, up 2%
- Asian: Substantially down, -27%
- Black: Stable, 0%
- Multiracial: Stable, -1%
- Latino: Up 11%
Section VI
Grade
Applications Decreased at EL, ML, and UL, but Increased at PG
Applications to EL Decreased, Except to 1st Grade

2021-22 Application Variation by Jan. 31, 2021 – Elementary Level

- Pre-K: -33%
- K: -8%
- 1st: 4%
- 2nd: -12%
- 3rd: -16%
- 4th: -22%
- 5th: -25%
Applications to 6th to 8th Grade Decreased
Applications to Upper Schools Decreased at 9th and 10th Grades, but Increased at 11th and 12th Grades
Summary

• Overall, total applications dropped 11% compared to last year. The application trend exhibited a wave pattern: from Sept. through Nov., the direction was moving upward; in Dec., the direction turned south but moved up again in Jan.

• Domestic applications slightly increased, but international applications substantially decreased. On the other hand, the decrease of international applications seemed slowing down in Jan.

• Applications to day schools and boarding schools both decreased about 11%.

• Applications seeking financial aid were relatively stable, whereas those assuming full pay decreased close to 20%.
Summary (cont.)

• Applications from students in schools within the U.S. and Canada had trivial variations: applications from students in public schools were similar while applicants from private schools decreased 2%. Applications from schools outside of the U.S. and Canada were significantly down: -34%.

• At the ethnicity group level, White, Black, and Multiracial groups had small variations, the Asian group decreased significantly, and the Latino group increased more than 10%.

• At the aggregated grade level, applications to elementary, middle, and upper levels all decreased. Postgraduate surged.