HANOVER RESEARCH

THE STATE OF PROSPECTIVE STUDENT ENROLLMENT:

COVID-19's Impact on High School Students' Academic Plans

INTRODUCTION

COVID-19 has increased the enrollment challenges facing many higher education institutions in both the short- and long-term. From attracting to matriculating and retaining students, the pandemic has the potential to make each of these points in the enrollment process even more difficult in the coming years. COVID-19 will especially affect prospective students, as the fall-out from the pandemic is impacting a wide array of factors that influence program selection. Examples of these decisions include the type of college or university prospective students will attend and how far away from home they are comfortable with going for higher education.

To gain insight into how the COVID-19 pandemic has affected prospective students' academic plans, Hanover Research conducted a national survey of more than 1,000 current high school sophomores and juniors in the United States who are considering attending an undergraduate program after high school.

Our study found that, though most prospective students are no less likely to enroll in college (81%), one in five are unsure of their future or changed their educational decisions and preferences as a result of the outbreak. With traditional student enrollments already on an overall decline, this deviation may have a considerable impact on institutions' financial health.

Institutions have an opportunity to assuage the concerns prospective students feel while bolstering their confidence in pursuing a degree. Though it is an uncertain time for many high school students, higher education providers can offer comfort via transparency into their future institutional planning while promoting the value of online education given the possibility of online/hybrid delivery in fall 2020 and beyond.

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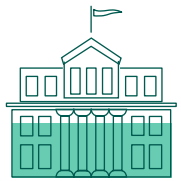
SNAPSHOT: STATE OF PROSPECTIVE STUDENTS

COVID-19 has reshaped many high school students' thinking about postsecondary education. While most still plan to attend a higher education institution, COVID-19 has impacted these plans for a third of respondents and more than half are concerned about its effect on them. Prospective students also say that an institution's response to COVID-19 is important in their decision making, yet a majority have not heard from any college or university on how they are handling the crisis, marking a communication gap that institutions can address.



62% of students

are very likely to attend a higher education institution after graduation

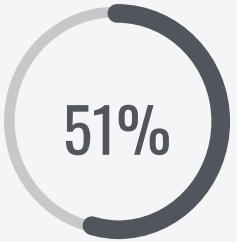
(n=1,143)

54% are concerned about the impact of COVID-19

on them as college students

(n=999)

Among those who have decided to change their academic program, 29% say they did so to make more of a difference in the world.



do not recall or have not heard how any institution is handling COVID-19 within the last 90 days

(n=1,024)

have decided to change academic programs

(n=1,125)

have changed their plans for higher education as a result of COVID-19

(n=1,143)

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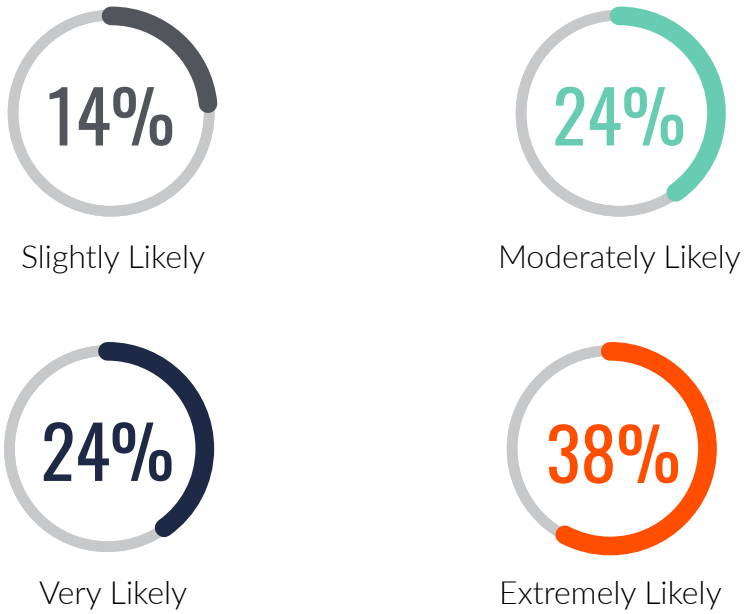
COVID-19'S IMPACT ON PROGRAM PREFERENCES

HIGH SCHOOL STUDENT PLANS FOR CONTINUING EDUCATION

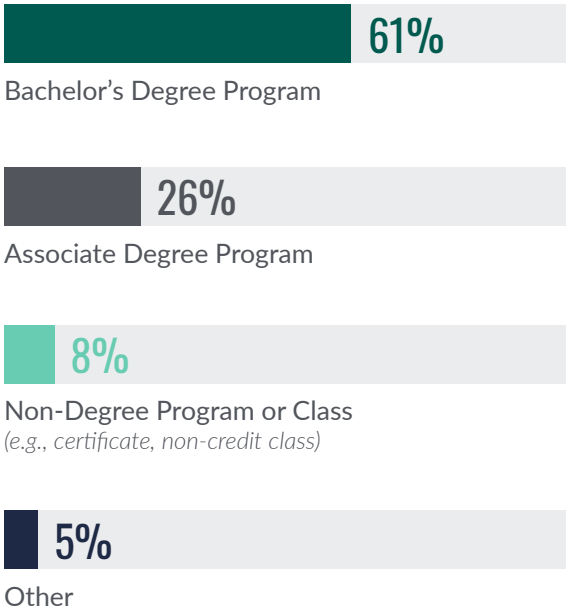
Traditional student enrollment is on a years-long downward trend, and institutions need to do all they can to maximize applicants. While most high school students have made a decision one way or the other on their likelihood of continuing their education, nearly a quarter are not so sure—indicating they are moderately likely to enroll. As one possible option to bolster enrollments, opportunity exists for universities to target specifically this 'moderately likely' subgroup to sway them to apply and ultimately enroll.

LIKELIHOOD OF ENROLLING IN AN UNDERGRADUATE DEGREE PROGRAM AFTER HIGH SCHOOL



(n=1,143)

TYPE OF PROGRAM PROSPECTIVE STUDENTS ARE MOST LIKELY TO ENROLL



(n=1,143)

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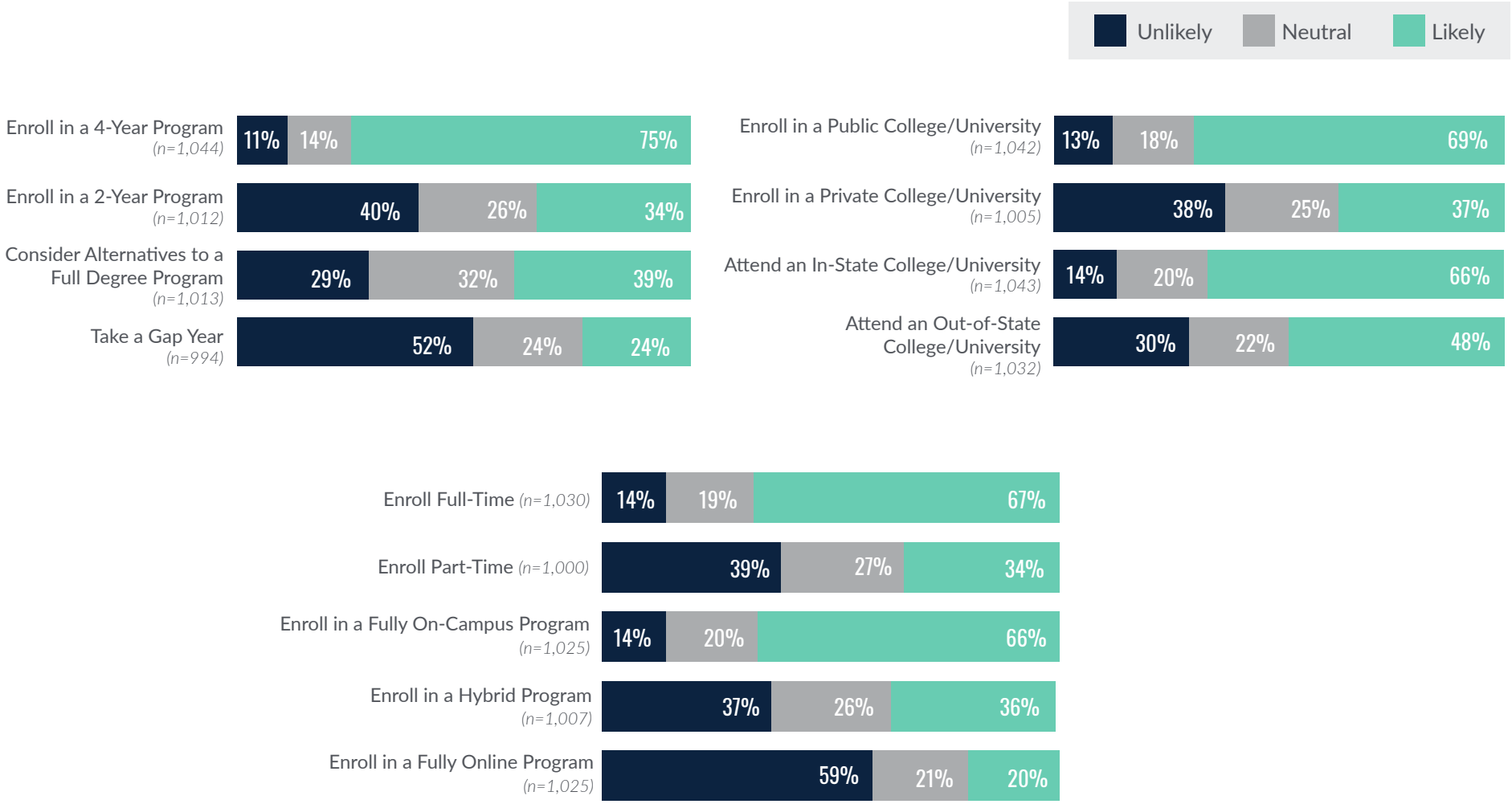
PREFERRED PROGRAM TYPES AND FORMAT

Among the high school students who completed our survey, enrolling in a 4-year program is the most likely scenario in comparison to enrolling in a 2-year program or taking a gap year. Overall, the respondents are notably more likely to enroll full-time in a fully on-campus program in comparison to part-time or hybrid/online options.

LIKELIHOOD OF PURSUING EDUCATIONAL PROGRAMS



*See appendix for full data results

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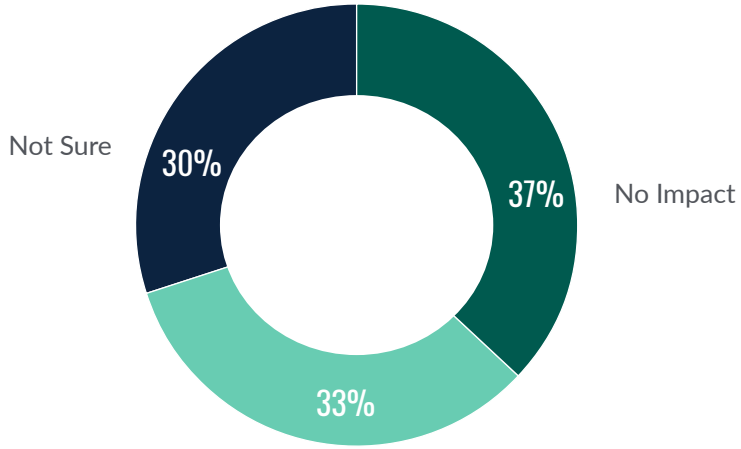
COVID-19 IMPACT: POST-GRADUATE PLANS

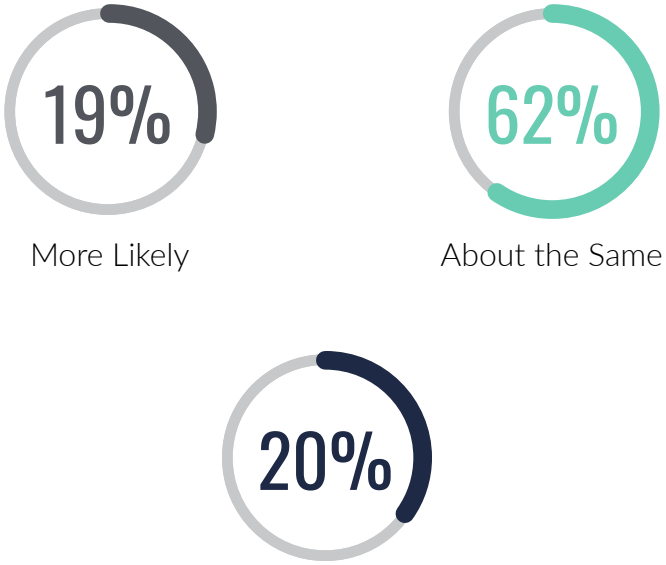
Respondents are equally divided on reporting whether COVID-19 has impacted their higher education plans. With nearly one-third of high school students unsure if their plans will change, the true extent of COVID-19's impact on enrollment remains unknown. However, it is clear that a significant number of potential students have already reconsidered their plans as a result of the pandemic. With one fifth of high school students already reporting they are less likely to enroll in their intended degree program due to COVID-19, institutions should focus on ensuring they have strategies in place to ease the fears and meet the needs of the students who are not yet sure of the pandemic's impact on their plans, to hit enrollment targets.

COVID-19 IMPACT ON EDUCATION PLANS



(n=1,143)

LIKELIHOOD OF ENROLLING IN SELECTED PROGRAM SINCE COVID-19



(n=1,015)

*See appendix for full data results

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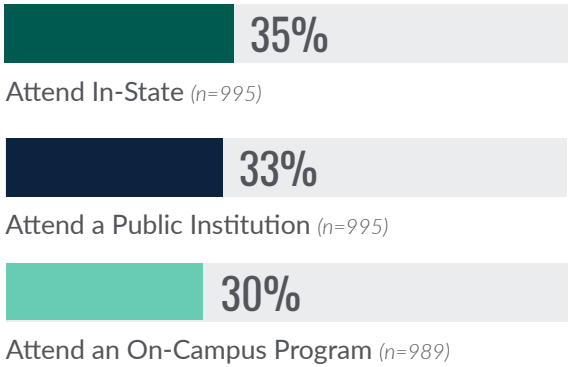
COVID-19 IMPACT: PREFERRED INSTITUTION TYPES AND PROGRAMS

The upheaval created by COVID-19 has encouraged a substantial proportion of prospective students to give more consideration to institution types that are traditionally less expensive. Around half of prospective students report they are about as likely to pursue the same type of institution or program they had planned before the COVID-19 outbreak. However, in-state and public institutions and on-campus programs have seen increased interest.

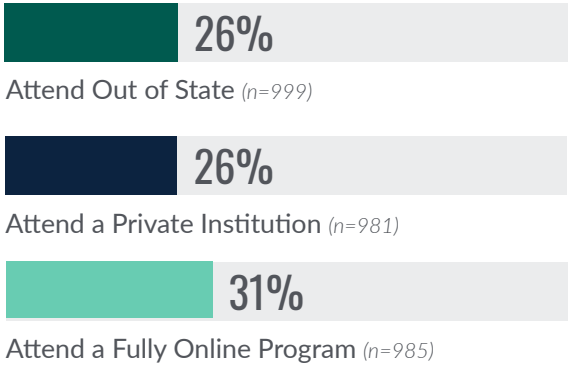
Alternatively, private and out-of-state institutions may see declines in enrollment, with over a quarter of prospective students feeling much less likely to enroll in either. These institutions will need to communicate the value their degrees provide, especially to the 29% of respondents considering alternatives to a traditional degree program.

Because of COVID-19, prospective students are:

MORE LIKELY TO:



LESS LIKELY TO:



*See appendix for full data results

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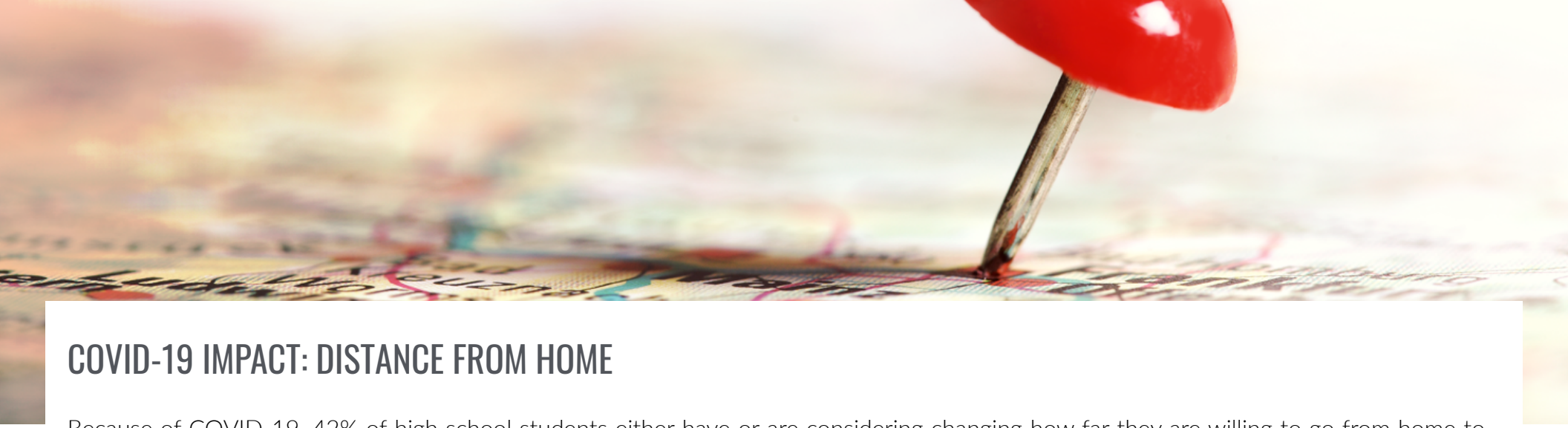
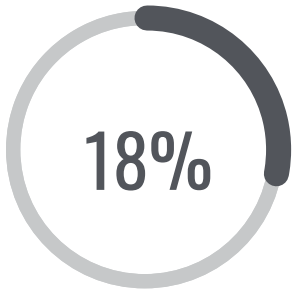


COVID-19 IMPACT: DISTANCE FROM HOME

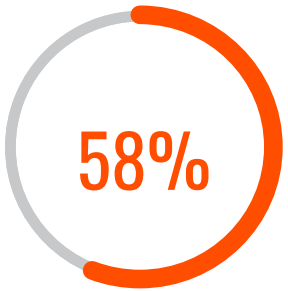
Because of COVID-19, 42% of high school students either have or are considering changing how far they are willing to go from home to attend a college or university.

HAS THE DISTANCE YOU WERE WILLING TO TRAVEL TO ATTEND YOUR PREFERRED COLLEGE/UNIVERSITY CHANGED AS A RESULT OF COVID-19?

Yes



Not Sure



No

(n=1,130)

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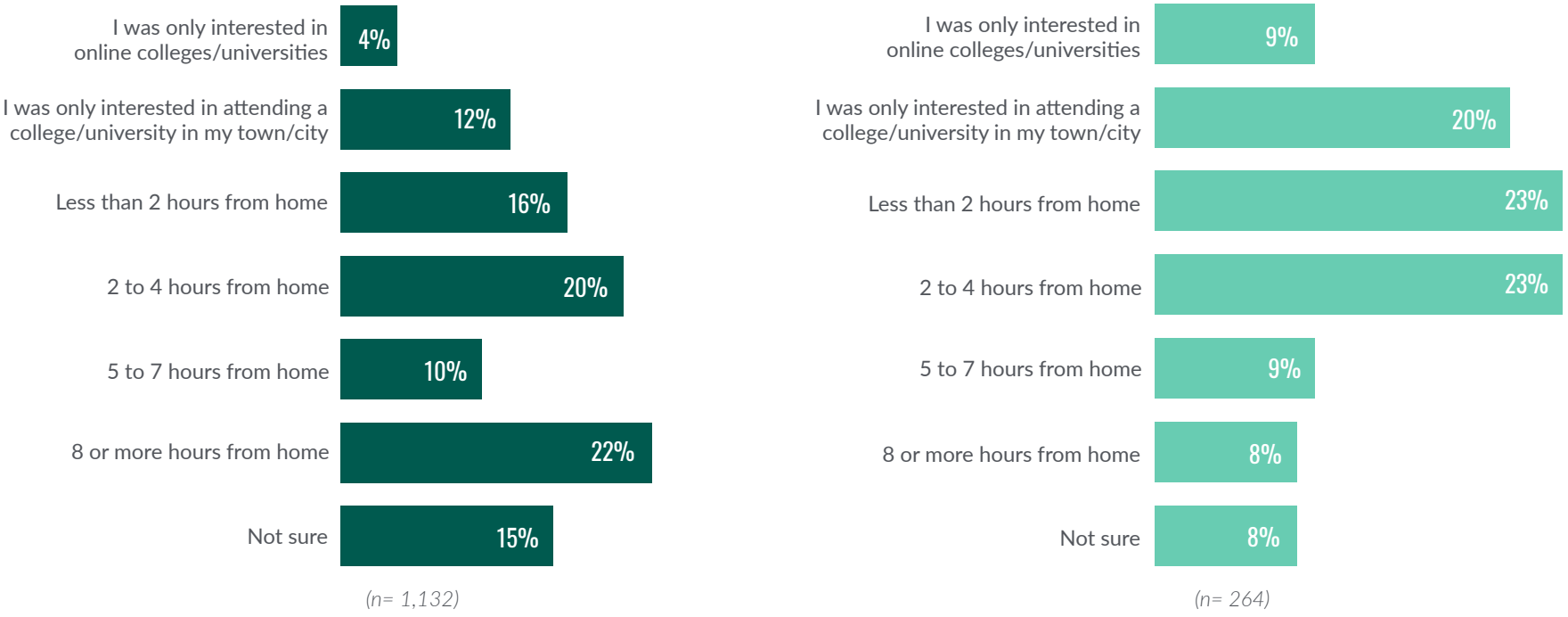
COVID-19 IMPACT: DISTANCE FROM HOME

Prospective students increasingly show interest in options that allow them to stay closer to home, such as fully online programs and locations within four hours. In contrast, respondents are less interested in attending institutions five or more hours away from home; only 8% of prospective students are now willing to travel eight or more hours to an institution. Colleges and universities can target their recruitment efforts on nearby high school students to encourage those most likely to express interest to apply.

DISTANCE WILLING TO TRAVEL TO PREFERRED INSTITUTION



* This question was asked only of respondents who indicated that their distance preferences changed as a result of COVID-19.

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IMPACT ON PROSPECTIVE STUDENT DEGREE INTERESTS

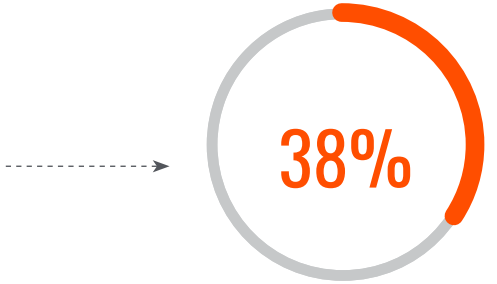
WHY HIGH SCHOOL STUDENTS PURSUE DEGREE PROGRAMS

Most respondents are likely to choose a degree program based on personal interests, even in the wake of the pandemic. With high school students still one to two years away from making their final decisions for higher education, this trend may change as they get closer to solidifying their choices.

78% of prospective students

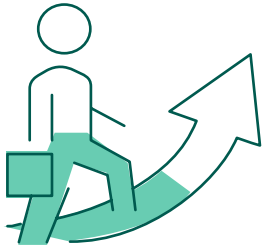
choose a degree program based on personal interest

(n=1,046)



report that COVID-19 has made them more likely to do so

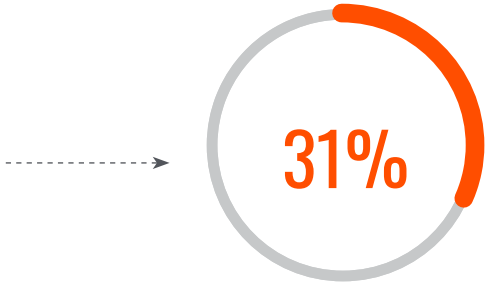
(n=999)



58% of prospective students

choose a degree program based on employment prospects

(n=1,011)



report that COVID-19 has made them more likely to do so

(n=978)

*See appendix for full data results

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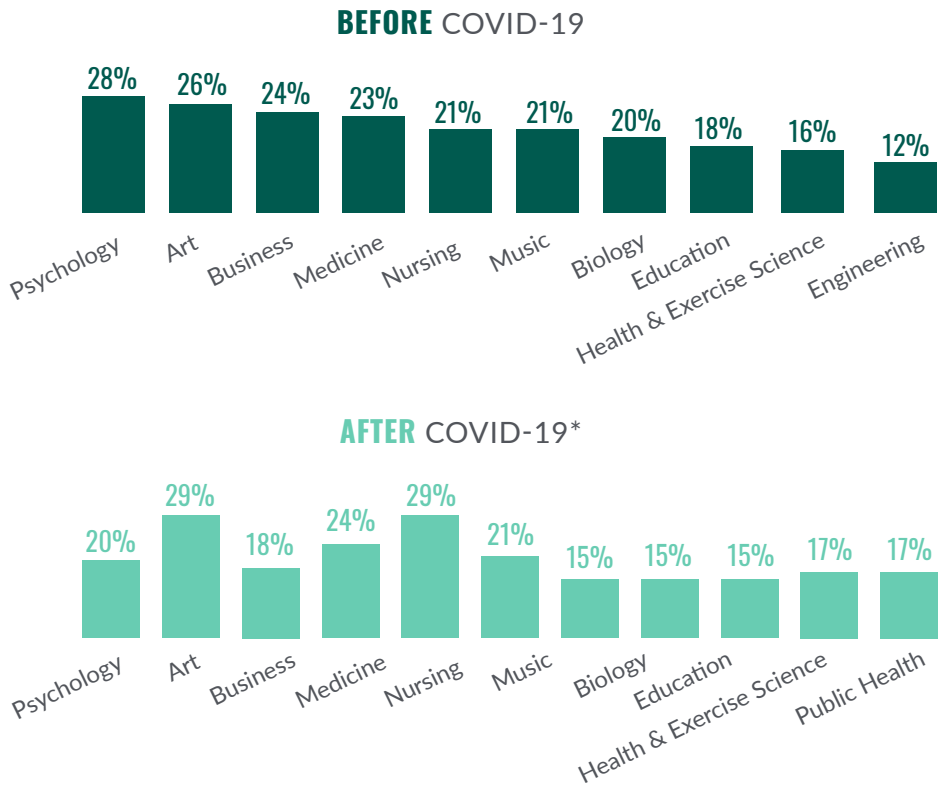
PROGRAM PREFERENCES

19% of prospective students have decided to pursue a different academic program due to COVID-19. Those that report changing their study areas because of COVID-19 are more likely to report interest in health-related fields, with interest in nursing increasing by eight percentage points and interest in public health increasing by seven percentage points (replacing engineering on the top-10 list). Additionally, prospective students who have decided to change their area of study show the most increased interest in pursuing political science as their major. These trends are likely due to prospective students' desire to make a difference in the world—one of the top reasons why some potential students decided to switch majors. Colleges and universities can capitalize on this increased interest in health programs by highlighting any ways that their departments have made a difference by contributing to COVID-19 relief (e.g., research labs studying vaccines).

IF HIGH SCHOOL STUDENTS HAVE CHANGED THEIR MINDS ABOUT AREAS INTERESTED IN STUDYING

MOST POPULAR AREAS PROSPECTIVE STUDENTS ARE INTERESTED IN STUDYING



Note: The follow-up question was asked only of those who indicate the areas they would be interested in studying changed because of COVID-19.

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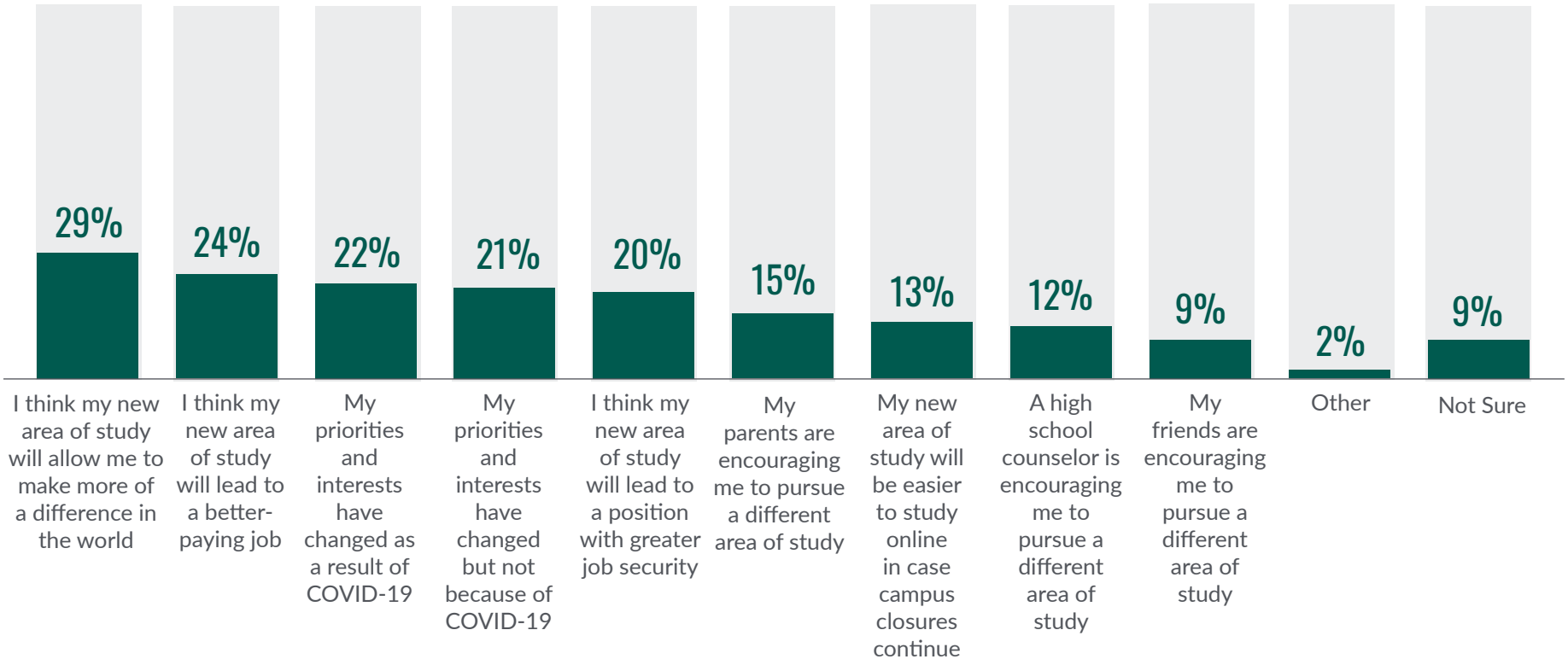
WHY PROSPECTIVE STUDENTS CHANGED THEIR PREFERRED AREAS OF STUDY

Beyond the desire to make a difference in the world, key factors for prospective students whose preferred area of study has changed were better paying jobs and greater job security. Institutions should ensure their degree programs are aligned with employer needs to promote job security after graduation. Many students cite changes in their personal interests/priorities as a reason for changing their area of study, though COVID-19 did not have a clear impact. Additionally, students express lower concern over pursuing their area of study online, indicating that they would be interested in pursuing their study online in case of additional campus closures.

WHY PROSPECTIVE STUDENTS CHANGED THEIR MIND ABOUT THEIR PREFERRED AREAS OF STUDY



(n=218)

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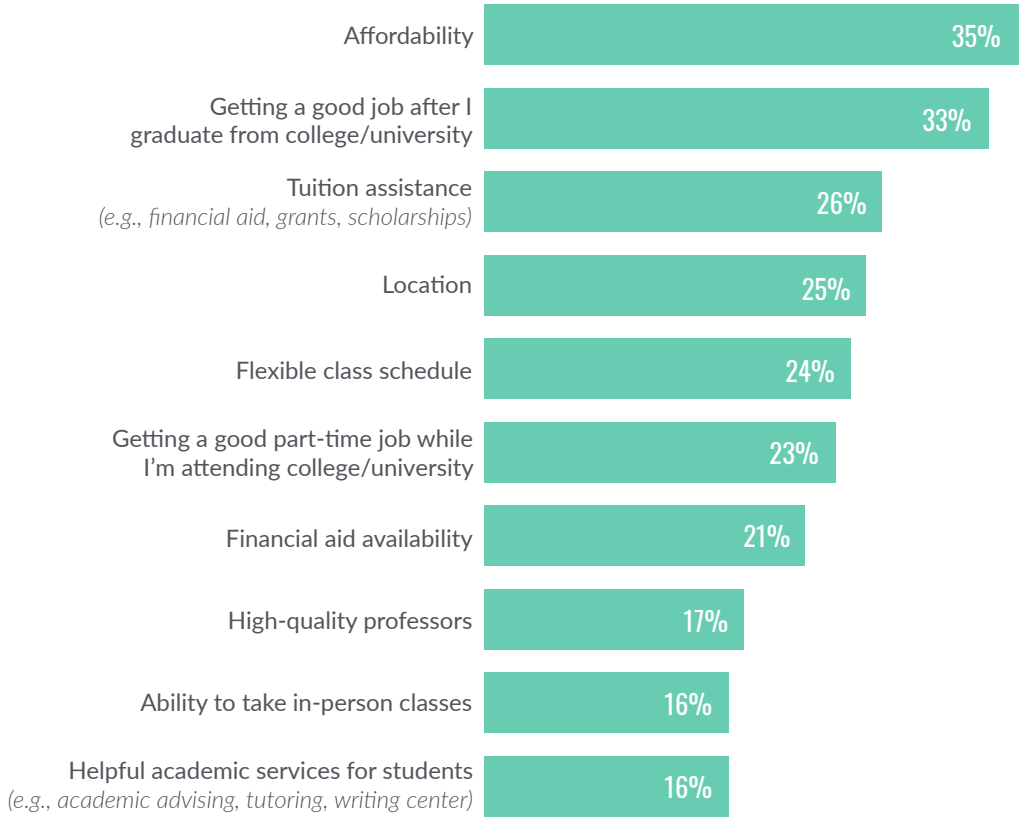
INFLUENTIAL FACTORS AND CONCERNS

IMPORTANT FACTORS IN DECIDING WHERE TO APPLY

The three most influential factors in determining where high school students apply and ultimately enroll are in some way financially related—affordability, employment prospects, and tuition assistance. Slightly less important are factors relating to academic programs such as format, professor quality, and academic services. With overall concerns largely being financial, colleges and universities can optimize their tuition and financial aid models and communicate the financial support available to students. Additionally, institutions can highlight alumni success stories on their website and in outreach to ease concerns about job security after graduation. Prospective students put comparatively little importance on the ability to take in-person classes, suggesting that most anticipate the campus closures associated with COVID to end by 2021. However, current high school juniors are significantly more likely than sophomores to be concerned with the status of in-person classes, indicating that universities should continue to include the status of campus offerings in their recruitment messages through the next enrollment cycle.

MOST IMPORTANT FACTORS WHEN DECIDING WHERE TO APPLY FOR SELECTED PROGRAM
Top 10 Factors



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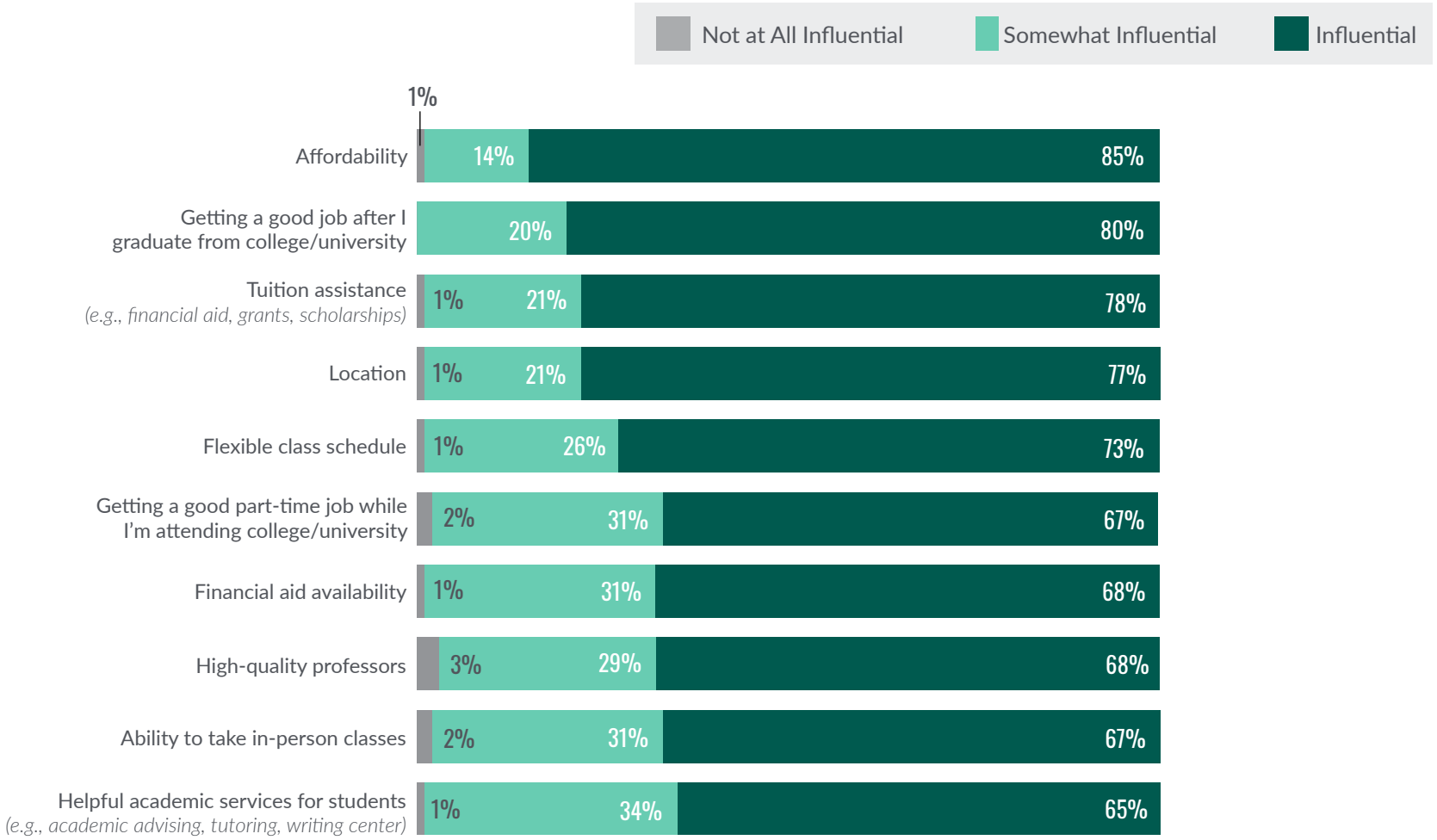
IMPORTANT FACTORS IN DECIDING WHERE TO ATTEND

MOST INFLUENTIAL FACTORS IN DECIDING WHICH PROGRAM TO ATTEND



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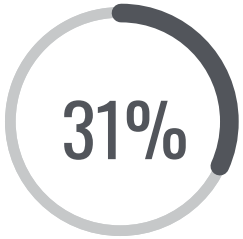
COVID-19 INFLUENCES ON EDUCATIONAL DECISIONS

While the most influential factors in where high school students apply are largely financial, the factors that will be most likely to change potential students' application and enrollment decisions in the wake of COVID-19 center on concerns about online/distance learning, particularly among current high school juniors. Institutions will need to communicate that the value students will receive from online/distance learning will be comparable to in-person models, and provide extra supports to address learning loss students experience due to these disruptions.

REASONS THAT MAY AFFECT HIGH SCHOOL STUDENTS' DECISIONS ABOUT CONTINUING THEIR EDUCATION

I may not be academically prepared for higher education because of the academic disruptions in high school caused by **school closures**



I may not be academically prepared for higher education because of the **shift to online/ distance learning** in high school

I may not be able to pay for my education due to changing financial circumstances (e.g., loss of job, parents unable to provide financial support)

I may not have access to the classes I want to take in person if offerings change due to COVID-19

I may not want to attend college/ university if I am **required to take online/distance classes**

(n=1,044)

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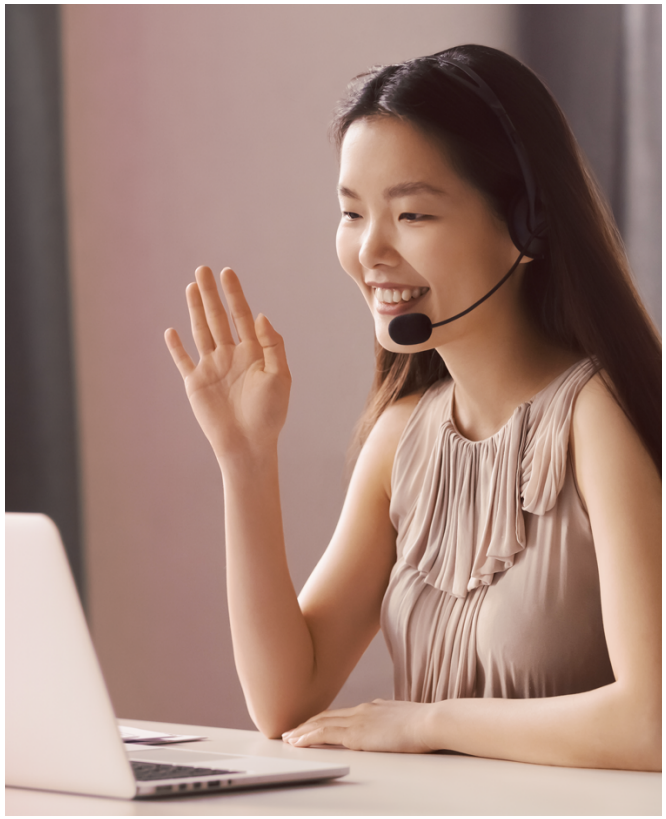
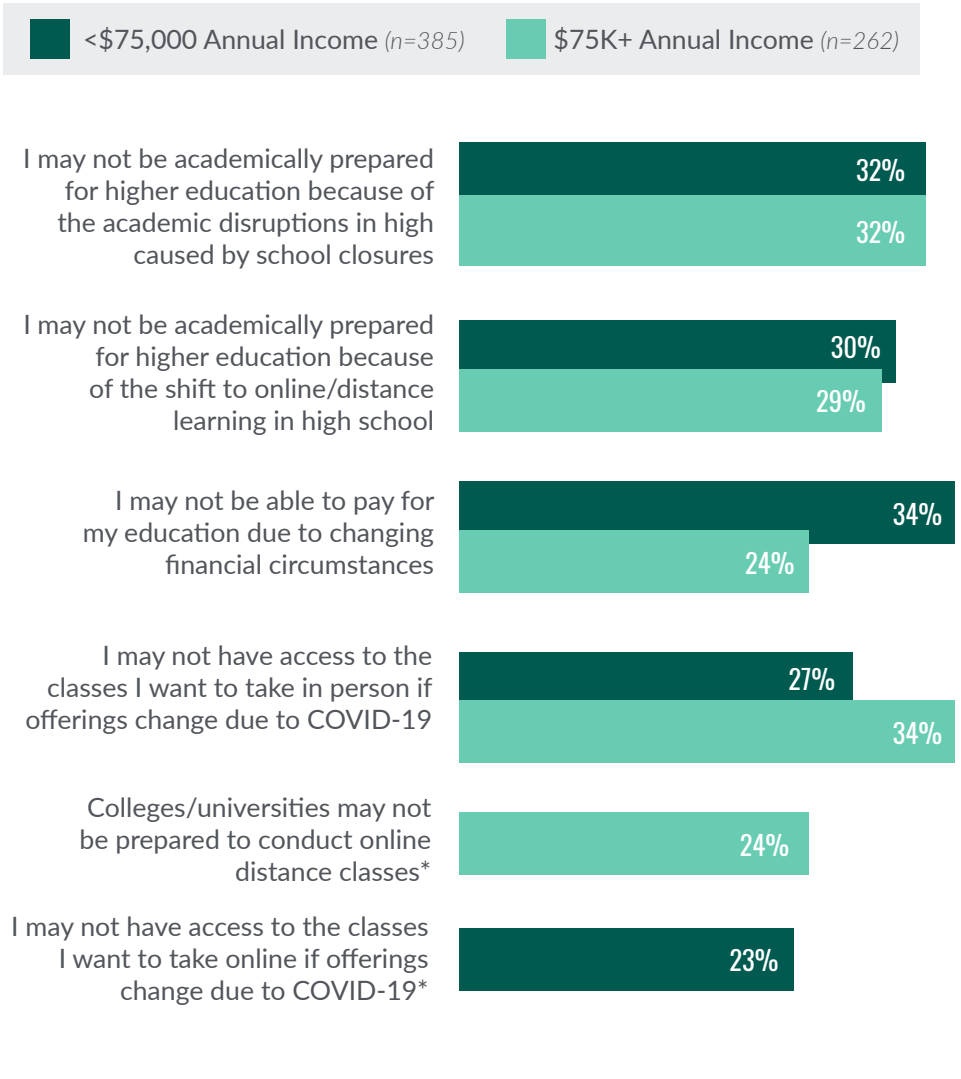
COVID-19 INFLUENCE ON EDUCATION PLANS BY HOUSEHOLD INCOME

High school juniors and seniors generally cite similar factors that might affect their future education decisions. However, those from households with less than $75,000 in annual income are more likely to point to inability to pay due to changing financial circumstances, and those from households with $75K+ in annual income are more likely to cite lack of access to desired in-person classes.



WHICH OF THE FOLLOWING MIGHT AFFECT YOUR DECISION ABOUT CONTINUING YOUR EDUCATION IN THE FUTURE?

Top 5 Most Frequently Selected



*Concern only noted for one income group

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CONCERNS WITH PURSUING HIGHER EDUCATION

HIGH SCHOOL STUDENT PERCEPTIONS OF HIGHER EDUCATION

While respondents largely feel as confident or more confident about the decision to pursue higher education, 37% of prospective students feel less confident that they will be safe while on campus. Residential colleges and universities will need to help alleviate these concerns by clearly communicating how they will keep students safe through sanitization and physical distancing efforts.

87% of prospective students
feel as or more confident that pursuing higher education is a good idea
(n=1,003)

46% are more confident
post-COVID-19 that pursuing higher education is a good idea

81% are as or more confident
their degree program will be worth the time and money
(n=997)

80% are as or more confident
they will receive a high-quality education
(n=999)

54% are concerned
with how COVID-19 will impact them as students
(n=999)

37% feel less confident
with they will be safe on campus
(n=979)

*See appendix for full data results

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Prospective student concerns about COVID-19 fall into three broad categories:

ACADEMIC
e.g., falling behind in classwork

SOCIAL
e.g., missing important events, social isolation

HEALTH-RELATED
e.g., mental & emotional health, physical health of others

More than half of potential students are concerned about how COVID-19 will impact their prospective higher education experience.

Given the higher level of anxiety among current high school juniors, institutions will need to address these three categories of concern in their immediate recruiting efforts to ease student worries. In addition, colleges and universities will need to ease the concerns of the 38% of high school students who are worried about not being able to visit campus in person. Without a comprehensive view of the campus, prospective students can be left feeling unsure about the institution, potentially lowering application rates. Institutions should ensure their website is optimized to provide an in-depth look at the school and campus life while considering virtual tours for a "real-life" look at campus.

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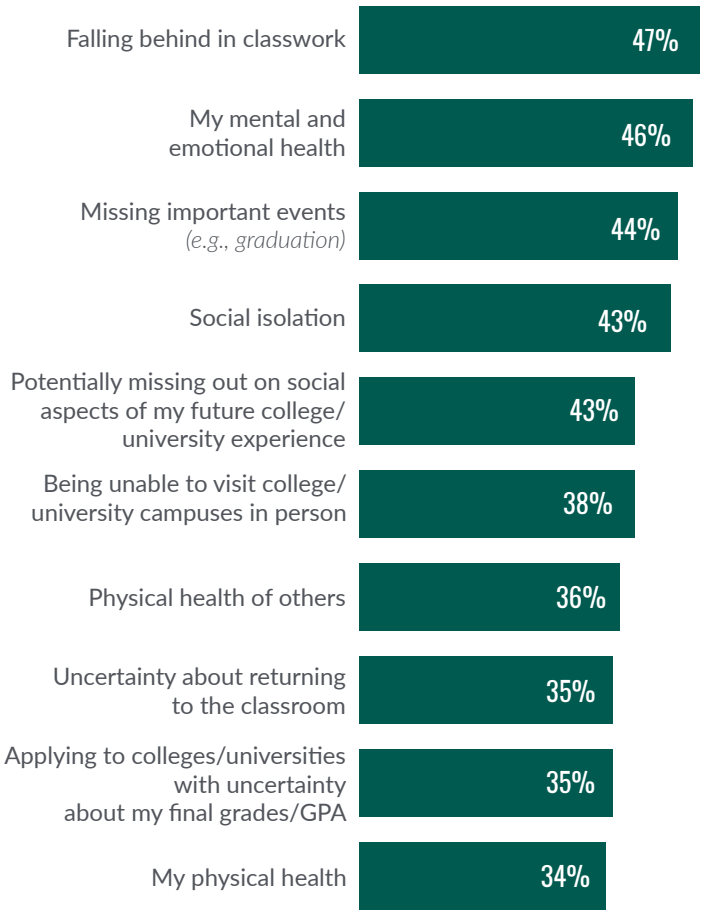
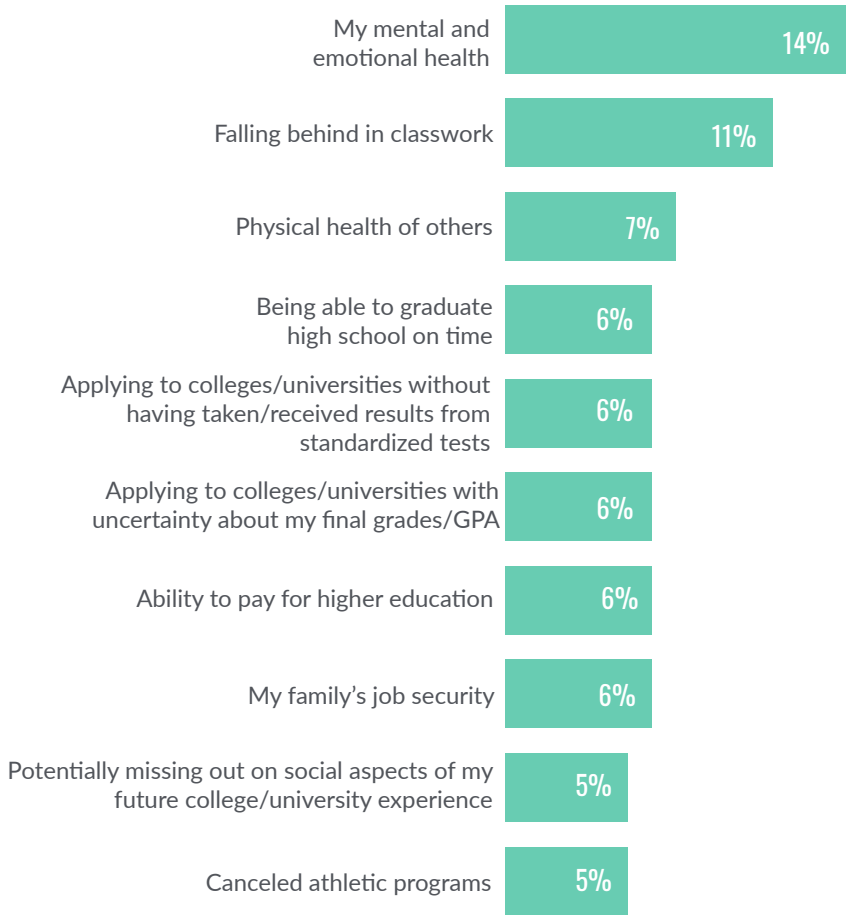
MOST FREQUENTLY REPORTED PROSPECTIVE STUDENT CONCERNS ABOUT COVID-19



(n=1,046)

PROSPECTIVE STUDENTS' BIGGEST CONCERNS ABOUT COVID-19



(n=866)

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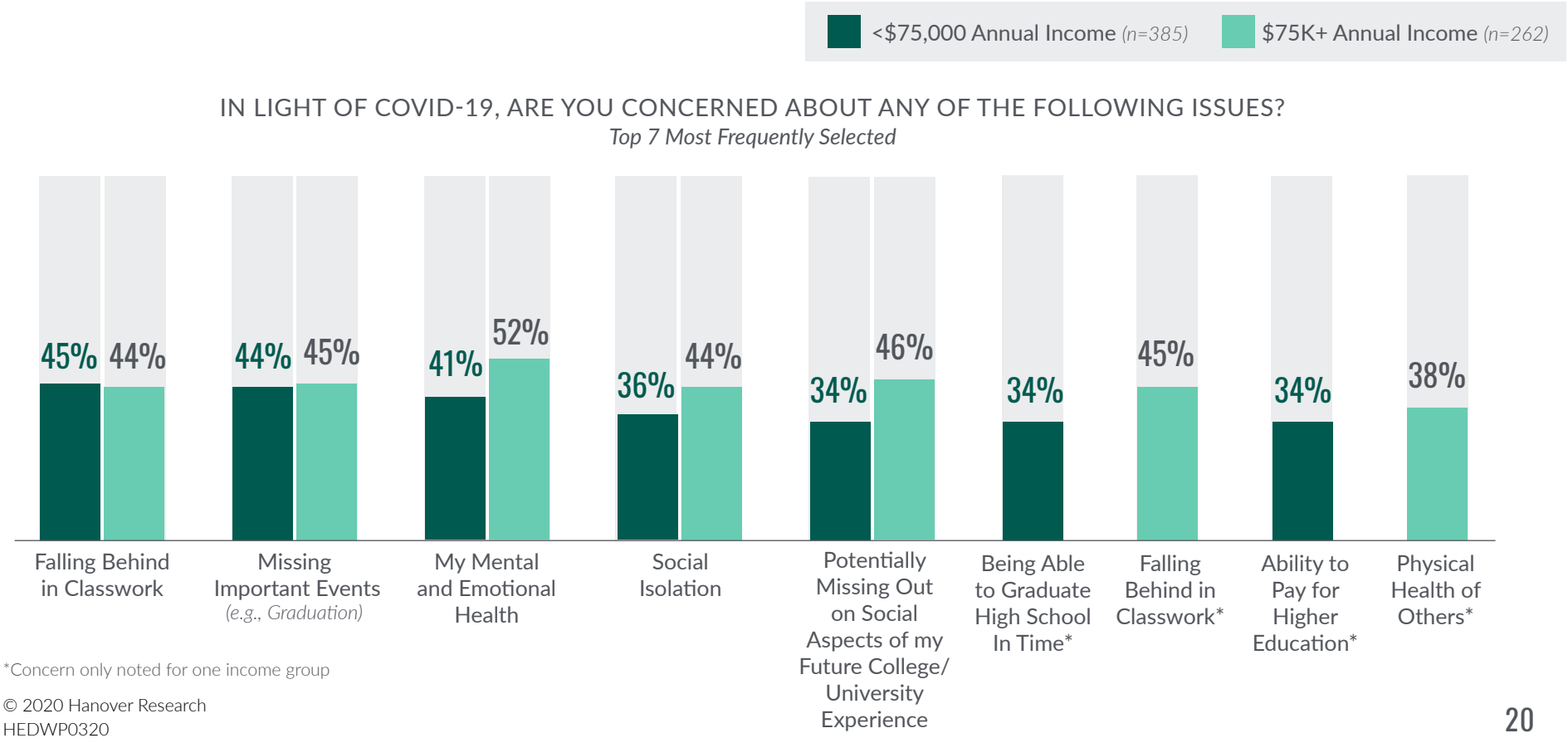
PROSPECTIVE STUDENT CONCERNS BY HOUSEHOLD INCOME

Across various household incomes, prospective students have similar concerns around COVID-19 - although there are some differences in how frequently certain concerns are voiced. For instance, respondents from households with $75K+ in annual income are more likely to have concerns about mental and emotional health.



*Concern only noted for one income group

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COMMUNICATING WITH PROSPECTIVE STUDENTS

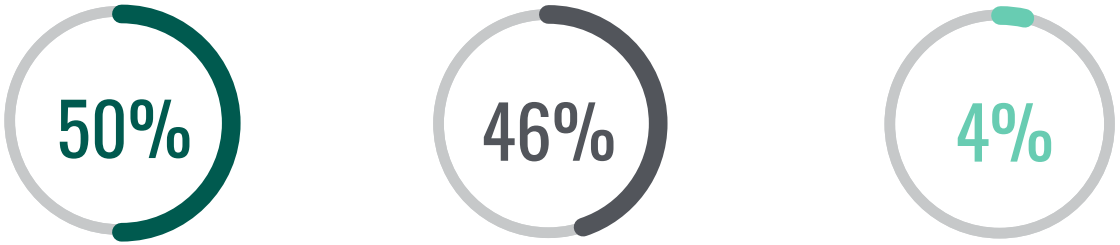
EFFECTIVENESS OF COVID-19 RESPONSES

With prospective student concern mounting over how COVID-19 will impact them as degree-seeking students, it is critical for colleges and universities to communicate their COVID-19 response regularly and transparently to prospects as well as current students. Institutions' responses to COVID-19 play a role in influencing educational decisions; however, more than half of prospective students have not seen, heard, or can recall how colleges and universities are responding to COVID-19 in the 90 days prior to completing the survey.

Institutions can increase the chances that their COVID-19 response will reach potential students by engaging them where they congregate online. Beyond posting regular social media updates about their COVID-19 response, institutions can pin tweets to the top of their Twitter feed and include links to COVID-19 information on their websites in their social media bios to ensure the information is easy for students. Colleges should additionally ensure their COVID-19 response is showcased on their homepage and explore search engine optimization to boost their response page's ranking in search results.

51% of high school students have not heard from any institutions on their COVID-19 response

HOW INFLUENTIAL AN INSTITUTION'S COVID-19 RESPONSE IS ON PROSPECTIVE STUDENT DECISIONS



(n=84)

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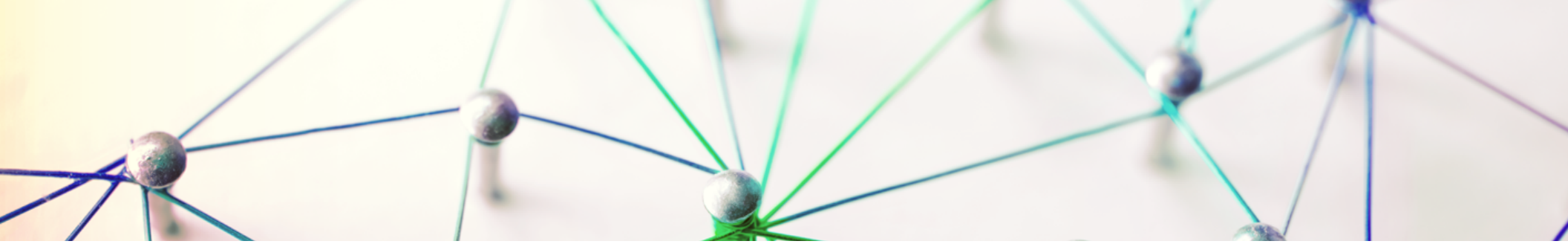
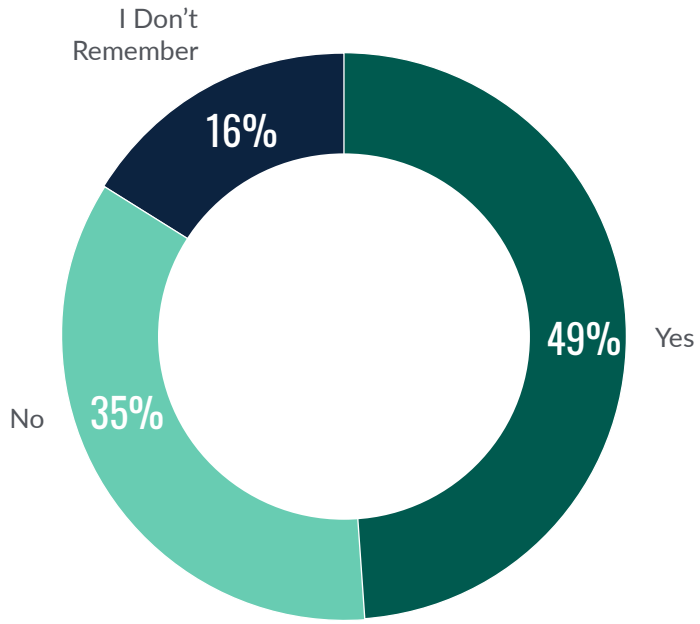
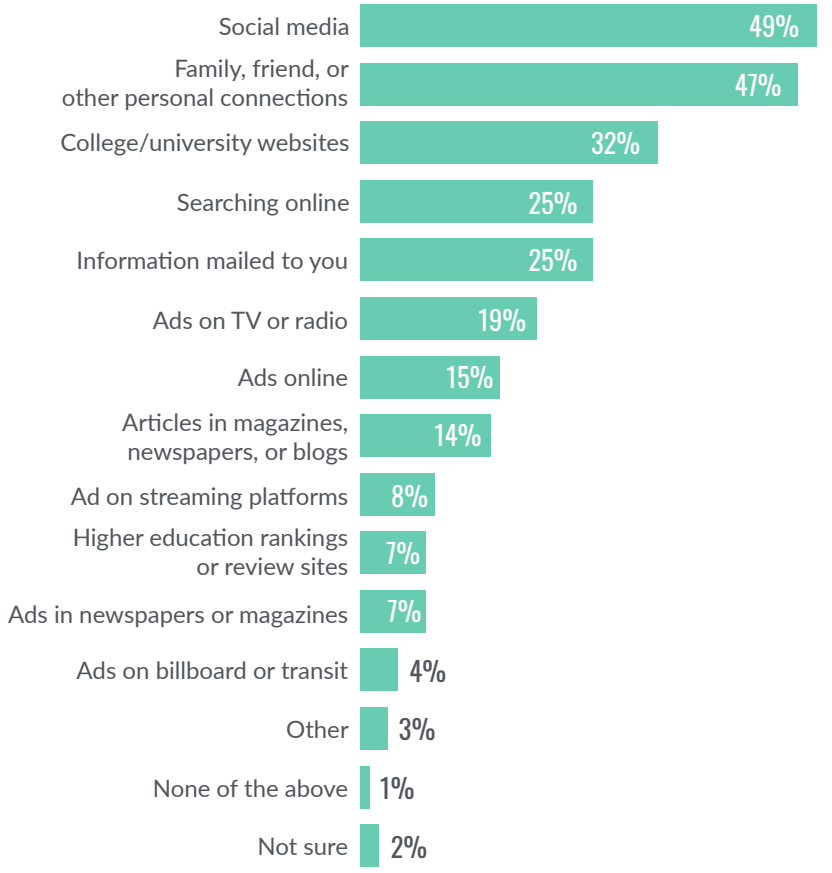


HAVE HIGH SCHOOL STUDENTS HEARD HOW COLLEGES AND UNIVERSITIES ARE HANDLING COVID-19 WITHIN THE LAST 90 DAYS



(n=1,024)

WHERE PROSPECTIVE STUDENTS HAVE SEEN INSTITUTIONS' COVID-19 RESPONSE WITHIN THE LAST 90 DAYS, BY SOURCE



(n=500)

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HOW POTENTIAL STUDENTS PREFER TO ENGAGE WITH INSTITUTIONS

Respondents prefer to engage with colleges and universities through email, followed by text messages and social media. Instagram is by far the preferred social media platform for receiving communications from institutions, with Snapchat and Facebook following. Institutions should ensure they have an established email strategy and focus their social media efforts on Instagram and Snapchat.

Online video chats like Zoom or Skype represent an emerging area of opportunity for universities, as 27% of potential students prefer them to traditional webinars or online presentations (15%). This indicates that prospects would like to take part in interactive, face-to-face presentations to learn more about institutions. Colleges may also be able to ease respondents' concerns over not being able to visit campus by offering these presentations where they can have their questions answered in real-time.

TOP 3 PREFERRED COMMUNICATION PLATFORMS

69%
Email

39%
Text Messages

37%
Social Media

(n=1,026)

TOP 3 PREFERRED SOCIAL MEDIA PLATFORMS

89%
Instagram

42%
Snapchat

30%
Facebook

(n=379)

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APPENDIX

STUDY OVERVIEW

KEY OBJECTIVES

- What are the perspectives of traditional age high school sophomores and juniors in relation to their future college enrollment decisions?
- How has COVID-19 impacted the perceptions of prospective college students?
- How can marketing and recruitment efforts for Fall 2021 and beyond be tailored to address students' needs in the wake of COVID-19?

METHODOLOGY AND APPROACH

- Hanover Research tested these questions and assumptions via a quantitative online survey targeted at current high school students considering enrollment at a higher education institution no earlier than the fall of 2020.
- A third-party panel vendor, Dynata, was used to recruit qualified participants.

RESPONDENT QUALIFICATIONS

Respondents met the following criteria to be qualified participants:

- Reside in the United States
- Age 16 or 17
- Currently enrolled as a sophomore or junior in high school
- At least slightly likely to enroll in an undergraduate degree program at a college/university after high school

After quality control measures, the analysis is based on a final sample size of 1,143 participants.

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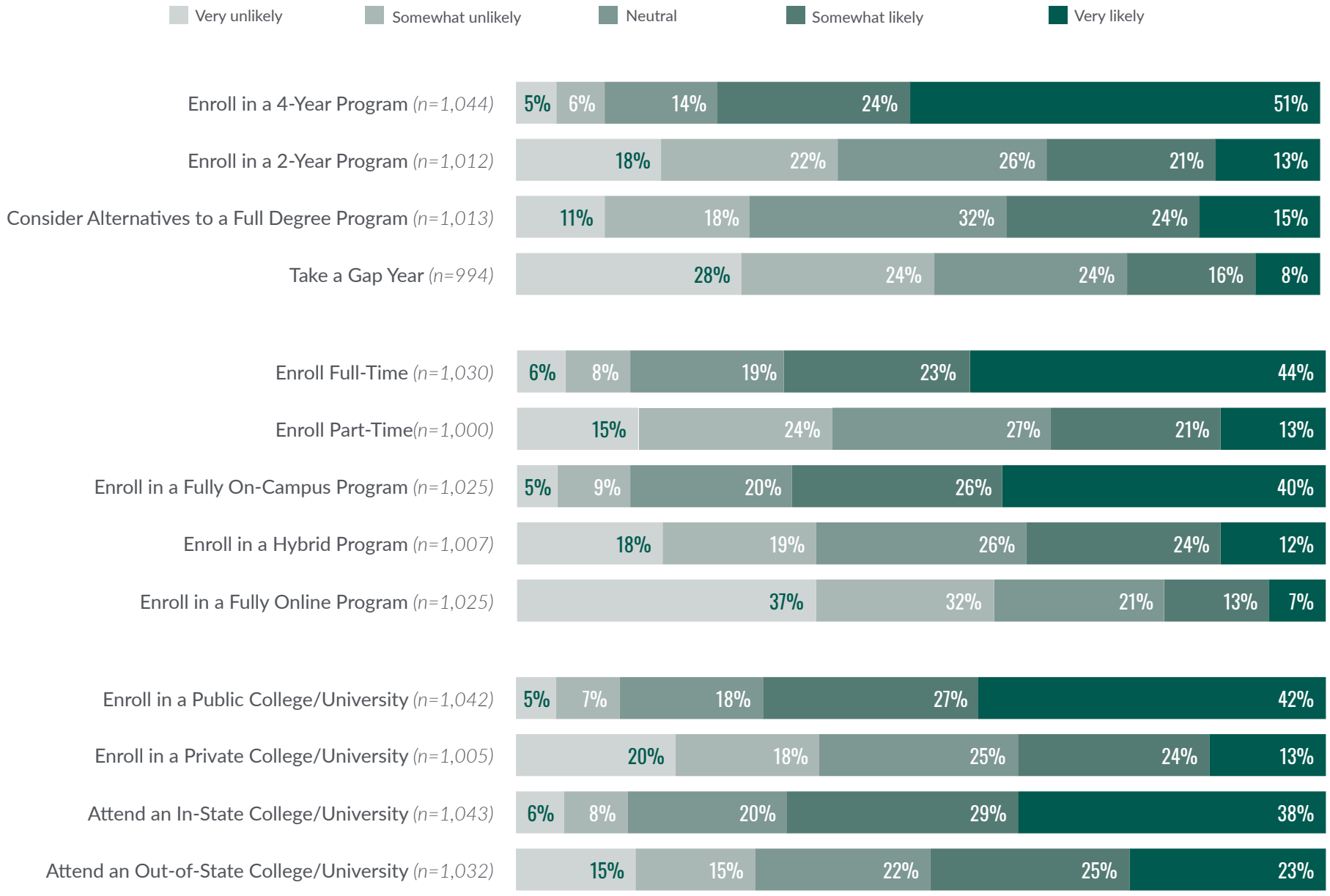
WHEN THINKING ABOUT YOUR CHOICES FOR HIGHER EDUCATION, HOW UNLIKELY OR LIKELY ARE YOU TO PURSUE THE FOLLOWING OPTIONS?



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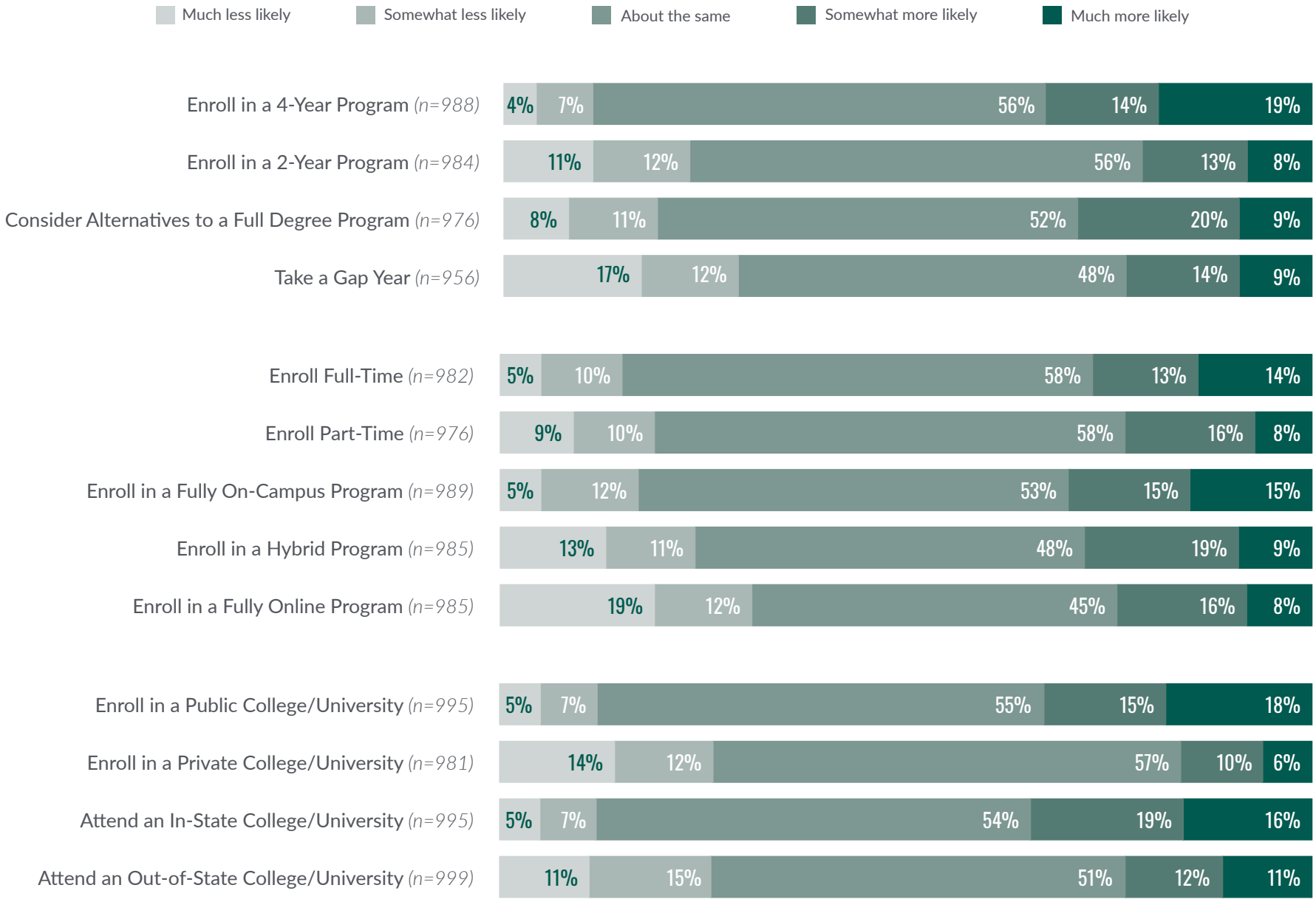
ARE YOU MORE OR LESS LIKELY TO PURSUE ANY OF THE FOLLOWING OPTIONS AS A RESULT OF COVID-19?



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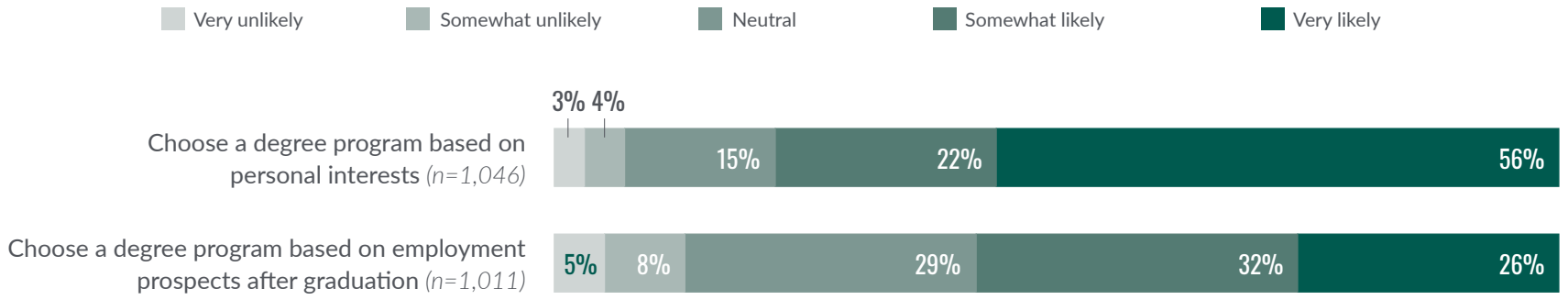
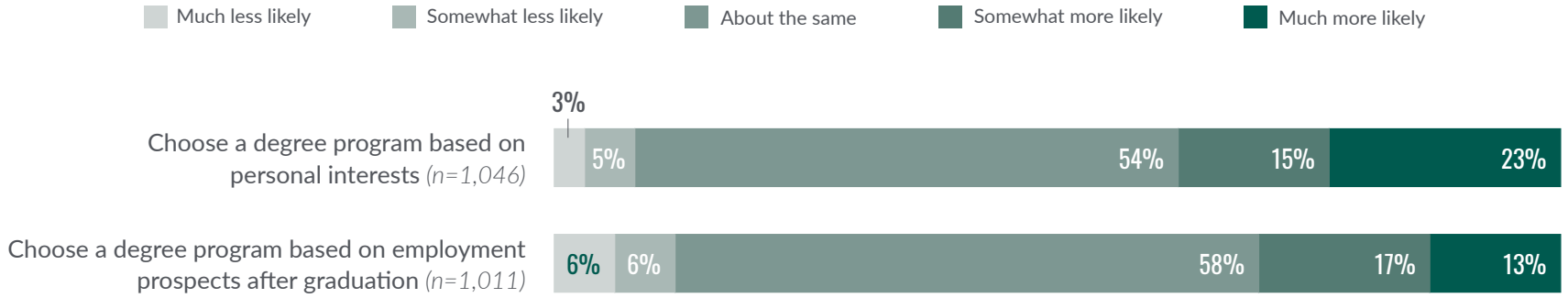
ARE YOU MORE OR LESS LIKELY TO PURSUE ANY OF THE FOLLOWING OPTIONS?

How Prospective Students Select Degree Programs



COVID-19 Influence on Degree Program



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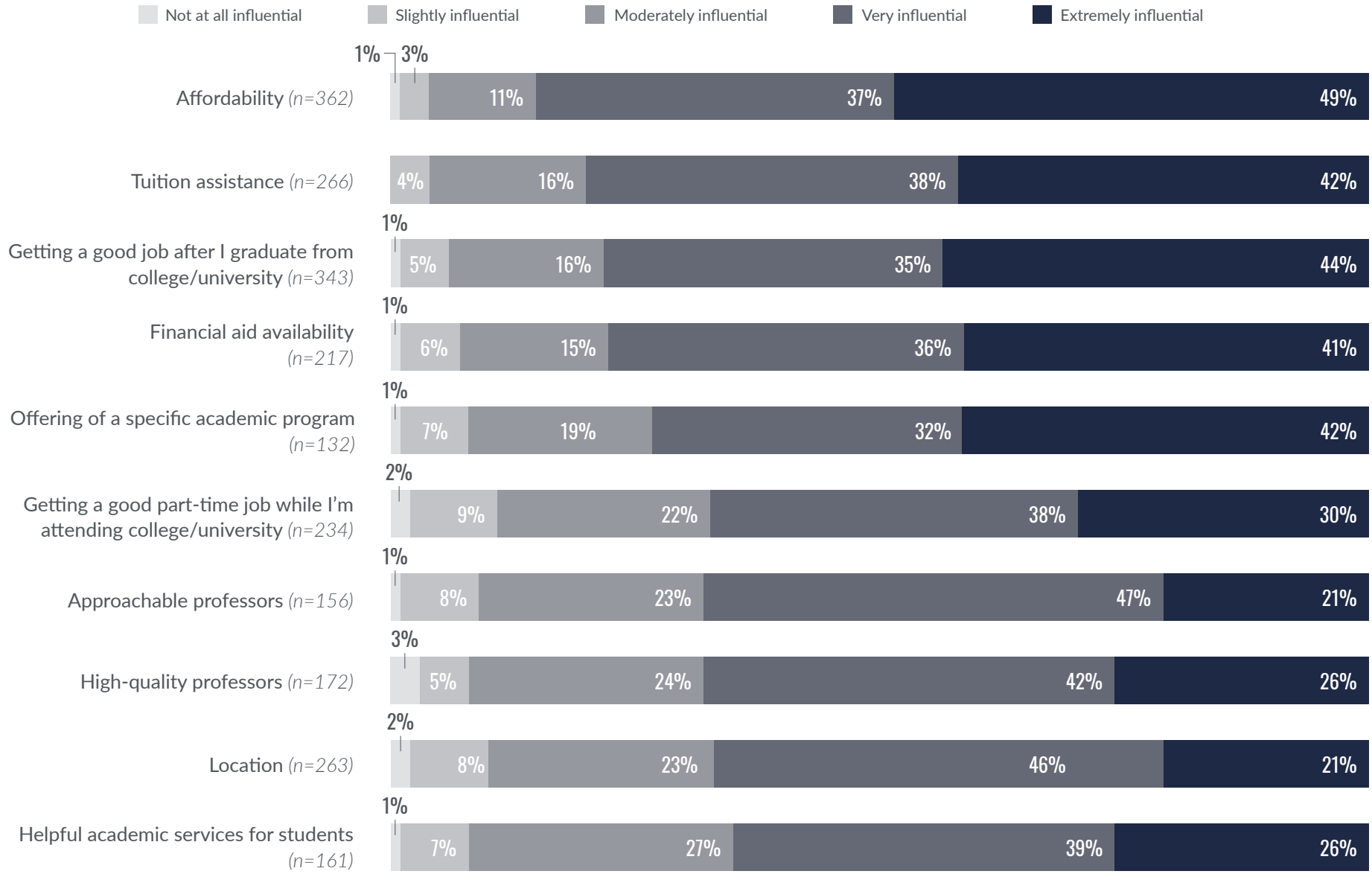
PLEASE RATE THE EXTENT TO WHICH THE FOLLOWING FACTOR(S) INFLUENCE YOUR CHOICE OF WHICH PROGRAM TO ATTEND

Top Ten Most Influential



Note: This figure contains only the top ten factors most likely to be rated very or extremely influential, excluding "Other" due to the small sample size for that item (n=6). For full results, please see data supplement. Respondents only rated items they selected as one of the top five most important factors in the previous question.

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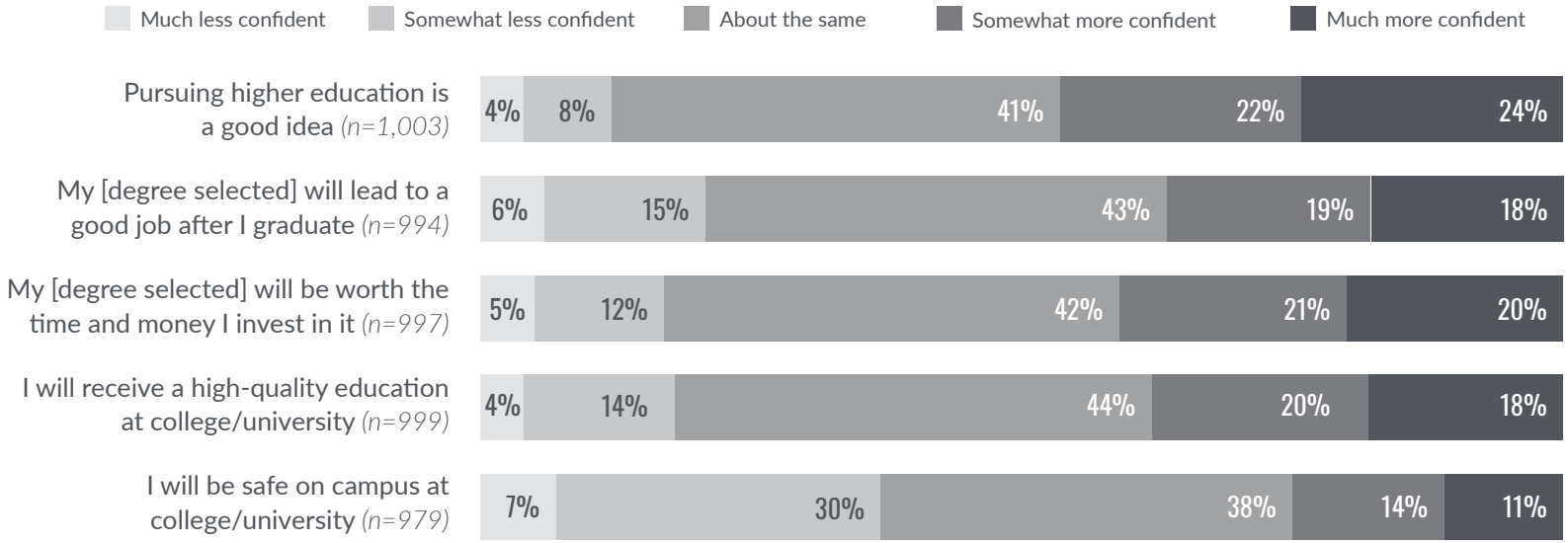
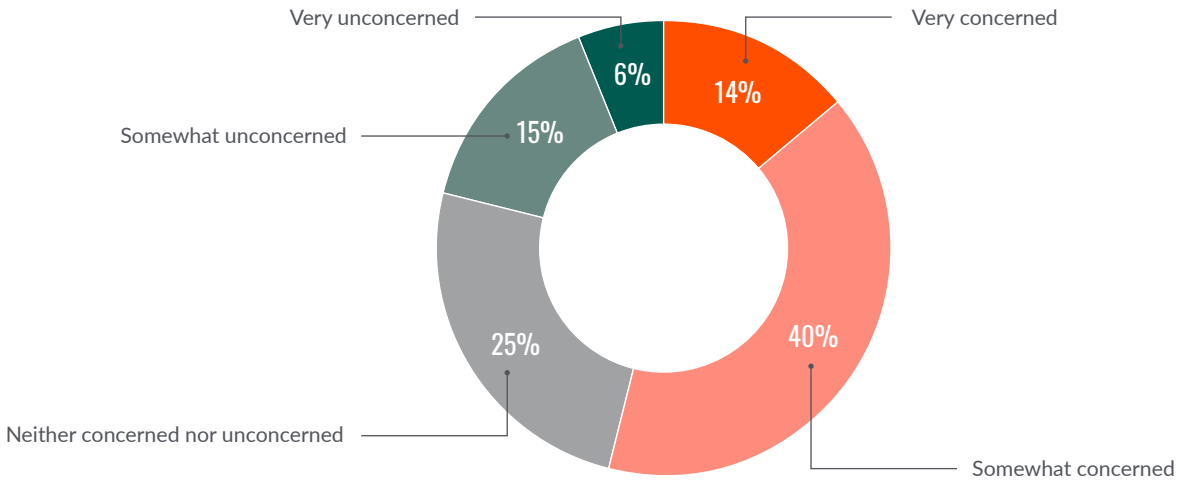
WHEN COMPARED TO HOW YOU FELT BEFORE THE COVID-19 OUTBREAK, DO YOU FEEL LESS CONFIDENT OR MORE CONFIDENT ABOUT EACH OF THE FOLLOWING NOW?



OVERALL, TO WHAT EXTENT ARE YOU CONCERNED WITH HOW COVID-19 IMPACTS YOU AS A PROSPECTIVE COLLEGE/UNIVERSITY STUDENT?



(n=999)

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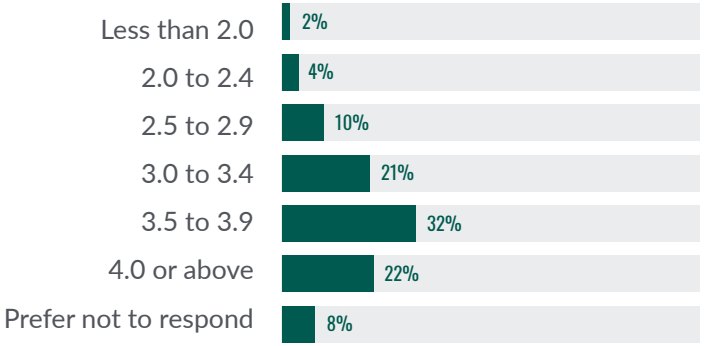
RESPONDENT CHARACTERISTICS

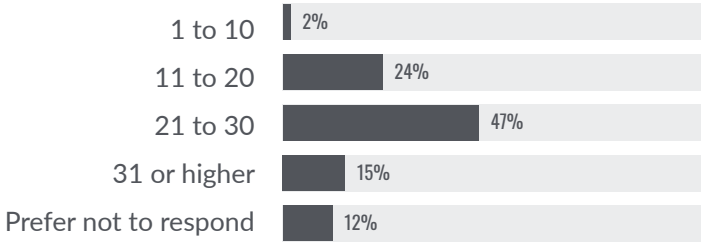
WHAT IS YOUR CURRENT HIGH SCHOOL GPA?

(n=1,021)



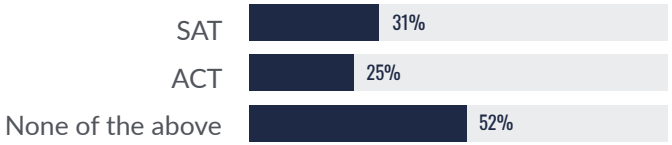
IN WHICH OF THE FOLLOWING RANGES DOES YOUR OVERALL OR COMPOSITE ACT SCORE FALL?

(n=260)



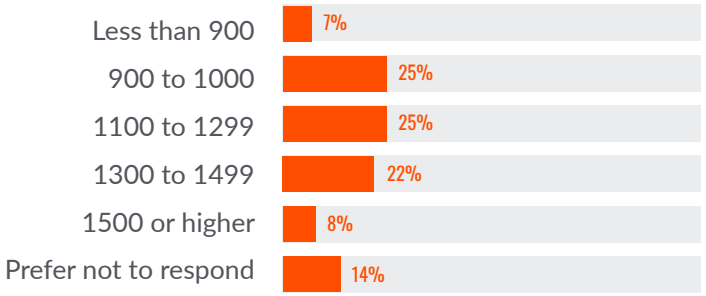
HAVE YOU TAKEN ANY OF THE FOLLOWING STANDARDIZED TESTS?

(n=1,021)



IN WHICH OF THE FOLLOWING RANGES DOES YOUR OVERALL OR COMPOSITE SAT SCORE FALL?

(n=312)



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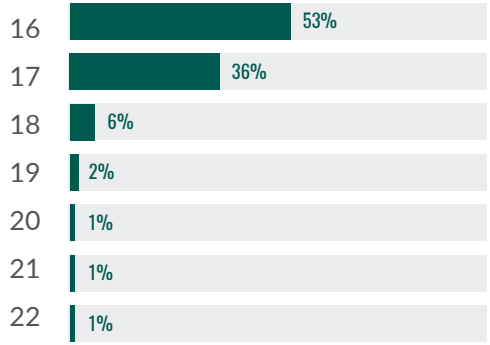
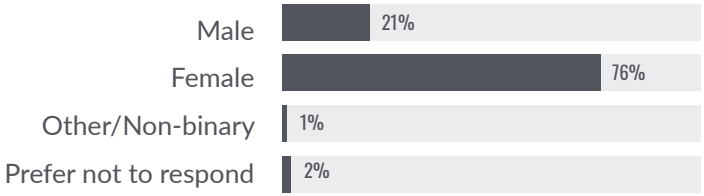
AGE *(n=1,021)*

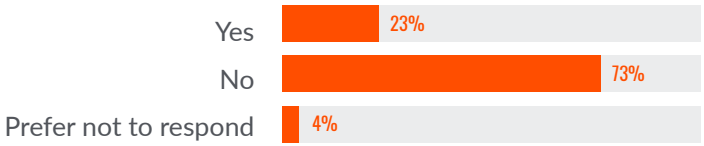


YEAR IN HIGH SCHOOL *(n=1,143)*

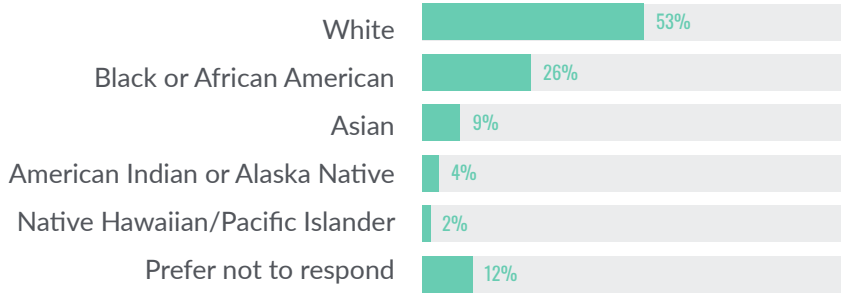
GENDER *(n=1,024)*



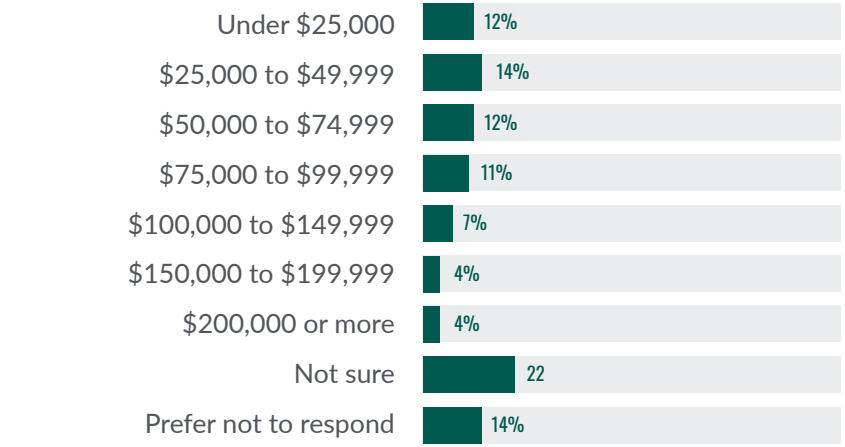
ARE YOU HISPANIC OR LATINO? *(n=1,024)*



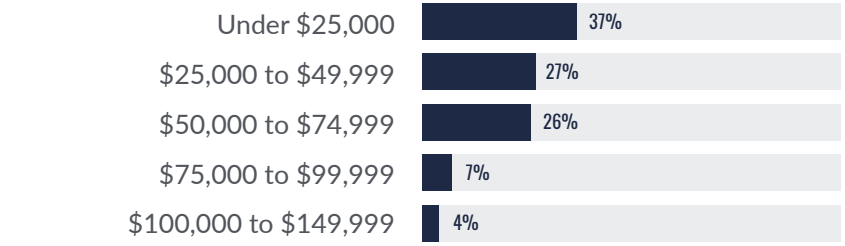
ETHNICITY *(n=1,024)*



ANNUAL HOUSEHOLD INCOME *(n=1,023)*



DID YOUR PARENT(S) GRADUATE FROM COLLEGE/UNIVERSITY? *(n=1,023)*



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MAJORS WITH THE MOST AND LEAST INTEREST AMONG HIGH SCHOOL STUDENTS CHANGING AREA OF STUDY

Area of Study	Before COVID-19	After the COVID-19 Outbreak	Percentage Points Change
Political science	7%	11%	4%
Computer science	6%	9%	3%
Not Sure	5%	7%	2%
Chemistry	9%	11%	2%
Public health	16%	17%	1%
Communication studies	10%	10%	0%
Medicine	24%	24%	0%
Philosophy & religious studies	6%	6%	0%
Other	5%	5%	0%
Engineering	9%	8%	-1%
Health & exercise science	18%	17%	-1%
Sociology	12%	11%	-1%
Physics	8%	7%	-1%
Mathematics	13%	12%	-1%
Nursing	31%	29%	-2%
History	11%	8%	-3%
Environmental science	8%	5%	-3%
Anthropology	4%	1%	-3%
Biology	20%	15%	-5%
Art	34%	29%	-5%
Business	23%	18%	-5%
English	18%	12%	-6%
Music	27%	21%	-6%
Psychology	26%	20%	-6%
Education	22%	15%	-7%

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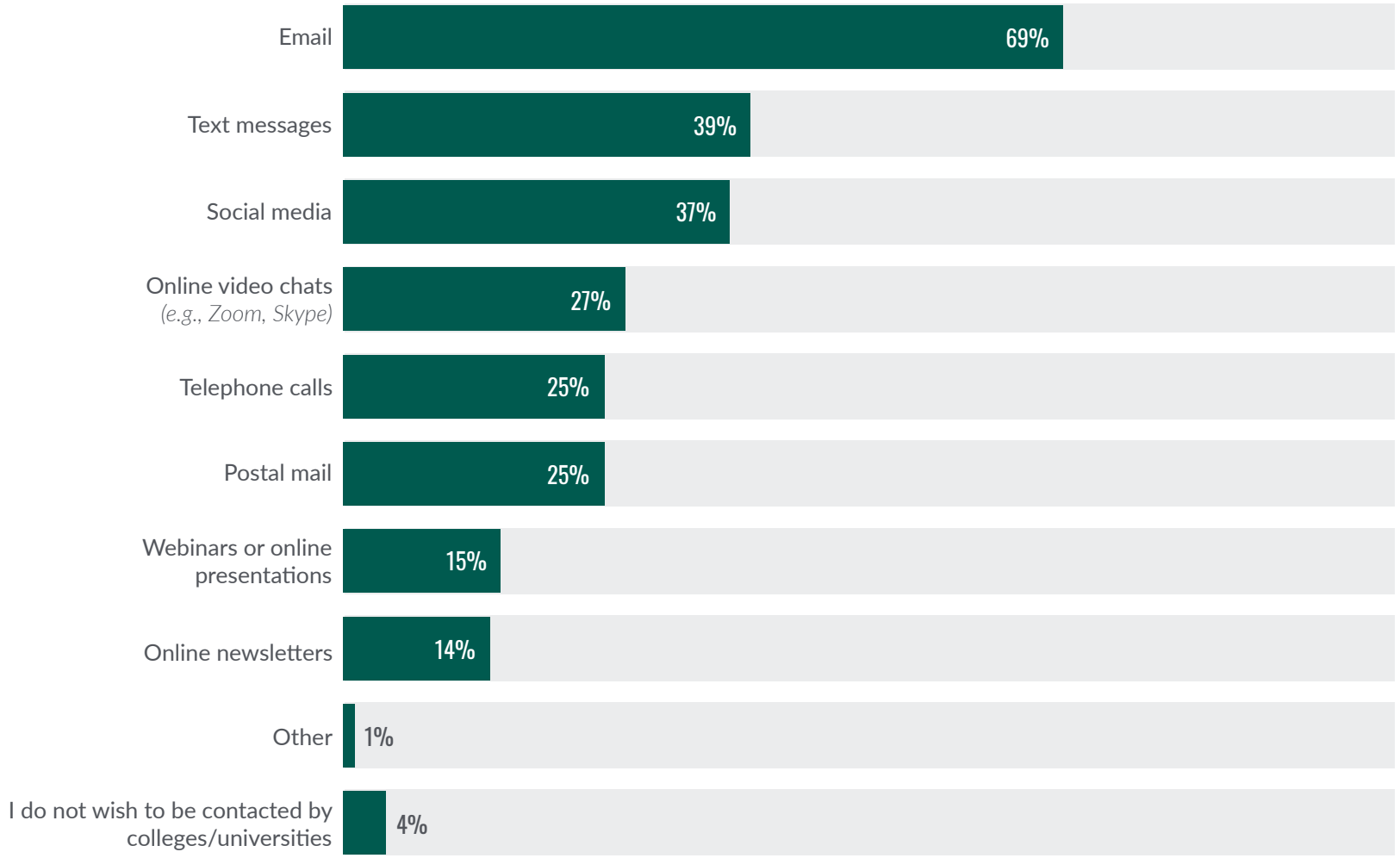
PREFERRED PLATFORMS FOR INTERACTING WITH INSTITUTIONS



(n=1,026)

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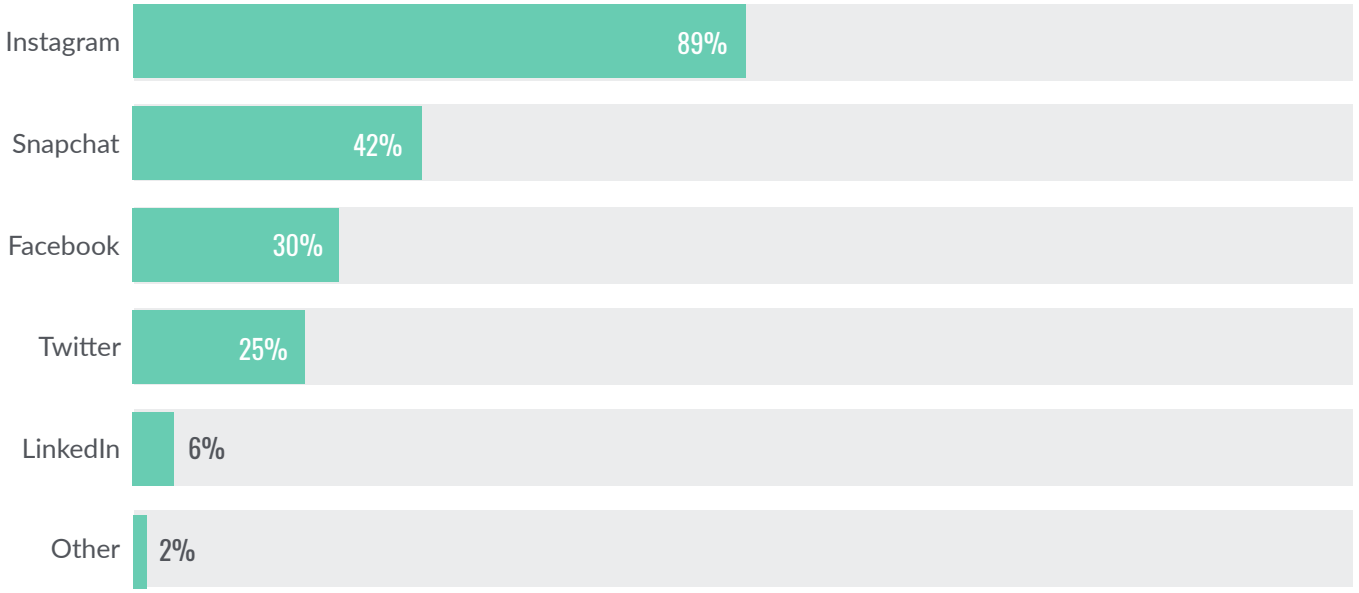
PREFERRED SOCIAL MEDIA CHANNELS FOR RECEIVING COMMUNICATIONS FROM INSTITUTIONS



(n=379)

Note: This question shown only to respondents who identify social media as one of the ways in which they would prefer to interact with colleges/universities.

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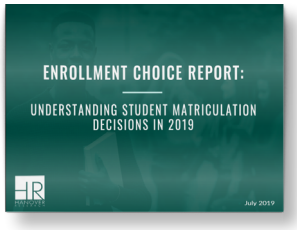
ADDITIONAL ENROLLMENT RESOURCES



FALL 2020 ENROLLMENT REPORT: COVID-19'S EFFECT ON RETURNING STUDENTS

We surveyed over 1,000 returning students to give you insight into how the COVID-19 pandemic has affected returning students' academic plans and well-being. Read our **Fall 2020 Enrollment Report** for key findings, including:

- 5 top challenges students face returning to campus this fall
- 5 main drivers of departure for those who leave
- 3 key opportunities institutions can leverage to increase retention
- The effect on international students and their plans for travel and enrollment

DOWNLOAD THE REPORT

DRIVE YOUR ENROLLMENT STRATEGY WITH CROSS-DEPARTMENTAL COLLABORATION

Our report, **Drive Your Enrollment Strategy with Cross-Departmental Collaboration**, outlines how all departments can contribute to enrollment. Read the report to learn how:

- **Enrollment** departments can optimize the enrollment funnel and appeal to new student segments
- **Academic Affairs** can attract students and deliver value with high-demand programs
- **Marketing** can build and communicate a unique value proposition
- **Alumni Affairs** can highlight post-graduate outcomes
- **Student Affairs** can implement strategies that engage and retain students
- **Finance** can align tuition and aid structures to prospective student needs

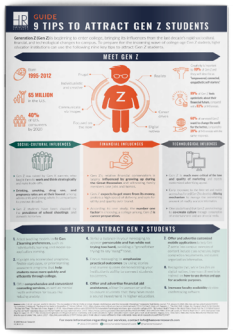
GET THE REPORT

6 TOP STRATEGIES TO DRIVE MATRICULATION

In this toolkit, **6 Top Strategies to Drive Matriculation**, we provide solutions to address the top matriculation and enrollment challenges that institutions face. Download the toolkit to learn how to:

- Effectively gather data to identify potential reasons for admission-to-enrollment conversion failure
- Clearly communicate tuition and financial aid to families
- Meet underrepresented students' needs to inspire them to enroll

READ THE TOOLKIT



9 TIPS TO ATTRACT GEN Z STUDENTS

Our infographic, **9 Tips to Attract Gen Z Students**, helps institutions prepare for the incoming wave of college-age Gen Z students by outlining nine key tips to meet—and exceed—Gen Z's college expectations. Download the infographic to:

- Meet Gen Z–Learn key facts about the personalities and priorities of Gen Z
- Understand Gen Z's influences–See how they have been influenced socially, culturally, financially, and technologically
- Attract Gen Z students–Get nine key tips to optimize your messaging, learning models, digital offerings, and more for Gen Z preferences

GET THE INFOGRAPHIC

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Hanover Research provides high-quality, custom research and analytics through a cost effective model that helps clients make informed decisions, identify and seize opportunities, and heighten their effectiveness.

OUR BENEFITS

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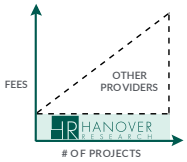

EFFICIENT

Annual, fixed-fee model shares costs and benefits

HANOVER'S HIGHER EDUCATION SOLUTIONS

GRANTS SOLUTIONS

- Grantseeking Capacity
  Develop your organizational capacity to pursue grant funding.
- Funding Research
  Spot grant opportunities aligned to your funding needs.
- Pre-Proposal Support
  Facilitate the development of competitive project concepts prior to submission.
- Proposal Review & Support
  Provide review and revision to ensure robust proposal submissions.
- Proposal Development
  Engage full proposal development support.

ACADEMIC SOLUTIONS

- Enrollment Management
  Target the optimal pool of students and maximize application and acceptance rates.
- Academic Development
  Strengthen your academic portfolio through market analysis of existing and potential new programs.
- Student Experience
  Spot at-risk students early, identify the drivers of attrition, and pinpoint factors driving poor post-graduate outcomes.

ADMINISTRATIVE SOLUTIONS

- Finance
  Increase revenue and dynamically evaluate costs to run an efficient, financially viable, and growth-oriented institution.
- Advancement
  Highlight your institutional impact with donors and alumni.
- Marketing
  Reach the right audience at the right time with the right message.

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