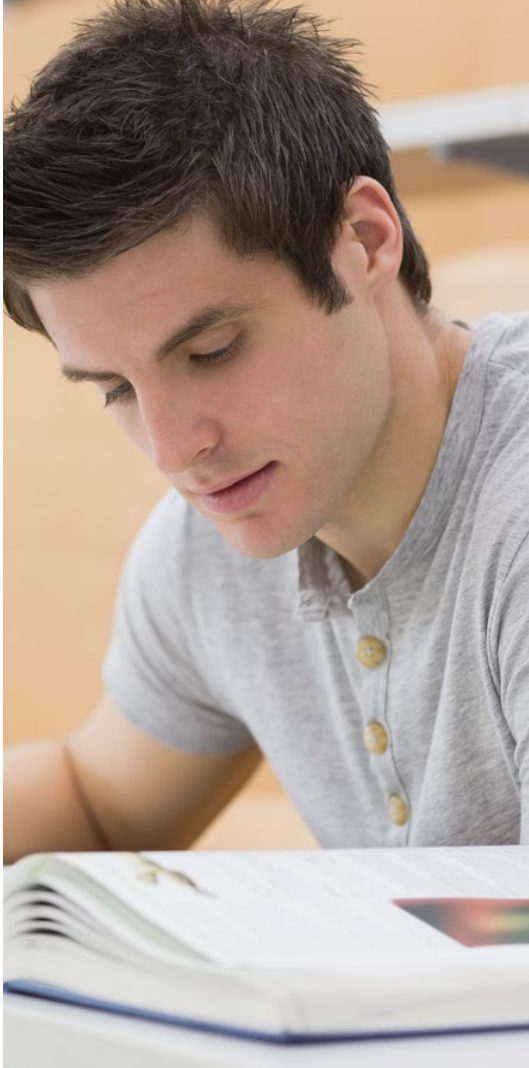


2022 NATIONAL PROSPECTIVE STUDENT SURVEY





INTRODUCTION

Prospective students are critical consumers, and the factors that influence their choice in postsecondary education are growing more diverse. They continue to seek flexible scheduling, digital coursework options, and shorter degrees or certificates in addition to a traditional four-year, on-campus experience. Facing economic uncertainty and concerns about job prospects after graduation, students expect value in their education and a strong return on investment.

These needs, though important, come at a challenging time for higher education institutions. With nearly **a million fewer students** in college than before the COVID-19 pandemic, leaders are tasked with filling class rosters as potential students consider a range of competing options and interests. This comes after nearly three years of remote and hybrid learning, which has acclimated high school students to learning from a distance.

Consequently, the pandemic has also exacerbated critical gaps in preparation. Many potential students believe they aren't prepared for the rigors of postsecondary academics or the demands of independent living, which could leave colleges and universities scrambling to help first-year students establish a foundation for long-term success.

In July 2022, Hanover Research surveyed more than 1,000 high school sophomores and juniors, ages 16 to 19, from across the United States who are at least slightly likely to enroll in an undergraduate or non-degree program at a higher education institution upon completion of high school. The survey examines the factors that are important to prospective students when considering where to apply and enroll. The findings provide insights on their preferred academic paths, geographic preferences, means of communication, and more.

Higher education leaders must understand the changing needs, learning preferences, and concerns of potential students. Keeping these factors top of mind, colleges and universities can begin an effective conversation that could ultimately lead to enrollment.

“Many potential students believe they aren't prepared for the rigors of postsecondary academics or the demands of independent living”



Is your organization prepared to predict and respond to changing student expectations?

Download **5 Higher Ed Trends to Watch in the 2022-23 Academic Year** to find out.

TABLE OF CONTENTS

2 / INTRODUCTION

4 / SUMMARY OF KEY FINDINGS

6 / DEGREE AND PROGRAM INTERESTS

9 / LEARNING PREFERENCES

14 / DECISION-DRIVING FACTORS

18 / COLLEGE PREPARATION AND ORIENTATION

22 / COMMUNICATION PREFERENCES

26 / CONCLUSION

29 / APPENDIX

32 / ABOUT HANOVER

HANOVER RESEARCH FOR HIGHER EDUCATION

Hanover's insights help higher education institutions strengthen their academic portfolios, maximize enrollment and retention, manage costs, improve brand perception, and engage alumni. From research to consulting and advisory services, our solutions address a comprehensive array of challenges to achieve the best possible outcomes for our clients and the students they serve.

BY THE NUMBERS

15%

increase in net tuition
revenue our clients
experience

\$500M

in new program
revenue

\$700M

in total
grant awards

11x

average ROI with
membership

600+

higher education
members

3000+

research projects
completed
since 2020

For more information about Hanover's solutions and services, turn to page 32 or visit hanoverresearch.com/higher-education.



SUMMARY OF KEY FINDINGS

Even as elements of normalcy return to college campuses, pandemic-related shifts continue to affect prospective students' expectations around flexible learning and to challenge their academic and financial preparedness.

SUMMARY OF KEY FINDINGS

PROSPECTIVE STUDENTS WANT FLEXIBILITY, SUPPORT, AND VALUE

Most prospective college students view a four-year bachelor's degree program as their top choice, but it's not the only option they'll consider. One-third are willing to consider other options such as certificate and other non-degree programs.

Meanwhile, after nearly three years of remote and hybrid learning, they continue to expect digital course options and flexible scheduling.

These shifts haven't dampened the interest in returning to campus. Nearly half are eager to learn in person. Still, many enrollees have self-assessed deficits in academic and social skills, which underscore the critical need to develop and market resources that deliver targeted preparation.

TODAY'S PROSPECTIVE STUDENTS HAVE EVOLVING EXPECTATIONS AND NEEDS



Degree and Program Interests

- They are most interested in a bachelor's degree, but 43% may also want an associate degree
- One-third are considering more than one degree, non-degree, or certificate program
- 34% are interested in part-time attendance



Learning Preferences

- Exclusively on-campus courses are the top choice for one-half of prospective students, but many others (36%) express an interest in hybrid courses
- Only 19% of respondents want to attend college fully online



Decision-Driving Factors

- When it comes to choosing a college, 89% of students consider cost very or extremely important
- The price of attendance is an important factor for first-generation students (49% vs. 34%)
- Future monetary benefits, including salary potential (77%) and resume/job credentials (71%) are key factors in choosing a program



College Preparation and Orientation

- 38% of prospective students say they are very or extremely prepared to continue their education after high school
- 55% worry about balancing schoolwork with non-academic responsibilities
- One-third of prospective students worry they lack adequate life and communication skills
- Orientation events focused on tours (56%) and social activities (53%) hold the most influence



Communication Preferences

- College websites (55%) and search engines (53%) remain top sources of information
- Instagram remains the top social media platform (80%) for interacting with institutions



DEGREE AND PROGRAM INTERESTS

Today's prospective students are looking for more diversified educational paths, with flexible scheduling and a broad mix of creative and technical academic programs.



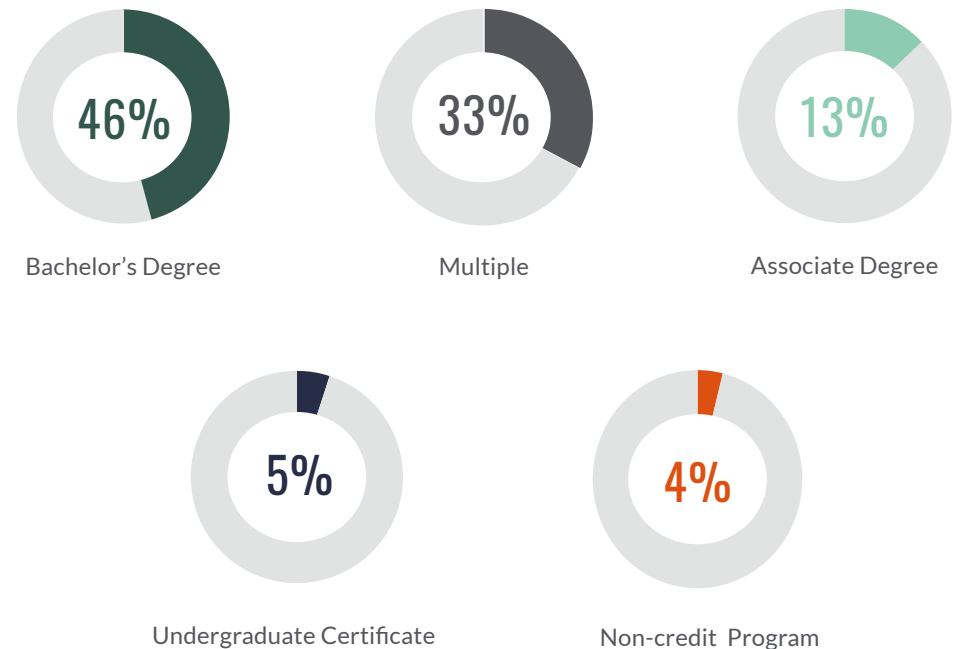
INTENDED DEGREE TYPE

About half of all respondents (46%) plan exclusively to pursue a bachelor's degree.

That number has been steadily dropping over the past two years: In 2021, 55% of prospective students planned to earn a bachelor's and in 2020 that figure was as high as 61%. Another 13% of respondents are most likely to only pursue an associate's degree. A smaller share of respondents considers an undergraduate certificate or non-degree program — 5% and 4%, respectively — as their top choice.

But not all decisions are set in stone: One-third of respondents are weighing multiple types of degree options, which suggests that issues of cost, caution, and an institution's core competencies are top of mind for many students seeking to make a smart decision and investment.

WHAT IS YOUR PREFERRED DEGREE?



INTENDED PROGRAM

Art is the most popular field of study (31%), followed by psychology (29%), health and exercise science (28%), business (24%), and music (23%). Those fields have remained top contenders among prospective students since 2020. Art placed second in this survey for the past two years, while psychology topped the list in 2020 and 2021.

THE TAKEAWAY

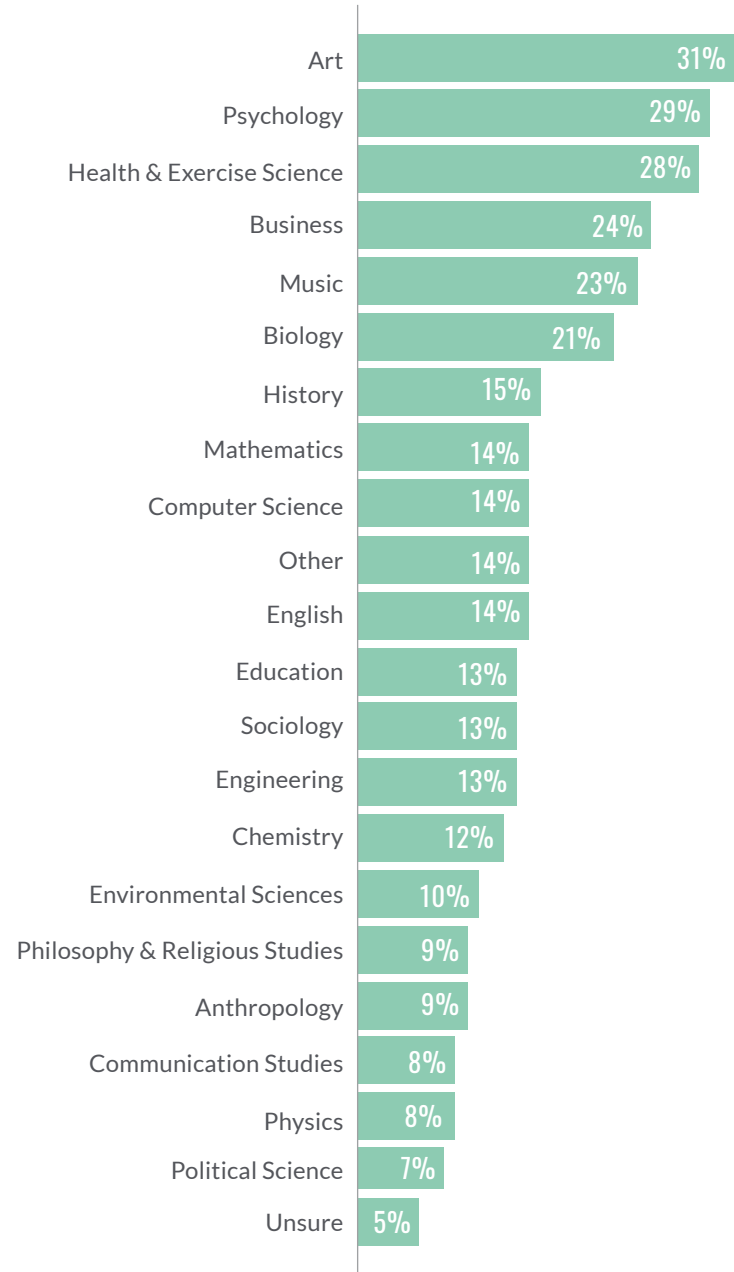
With one-third of potential students considering multiple degree types, institutions must have a thorough understanding of the paths enrollees may take to receive a degree or certificate – and how the pandemic and evolving career trends could influence which program a prospective enrollee will ultimately choose.



Does your institution's academic portfolio align with today's in-demand career paths?

Download **Top 10 Degrees on the Rise in 2022** to find out if you're offering the degrees that will translate into careers.

WHAT IS YOUR INTENDED MAJOR OR FIELD OF STUDY?





LEARNING PREFERENCES

Prospective students want varied course formats, schedules, credit loads, and degree types, pressuring colleges and universities to offer a wide set of learning opportunities.

TOP FORMATS FOR BACHELOR'S DEGREE PROGRAMS

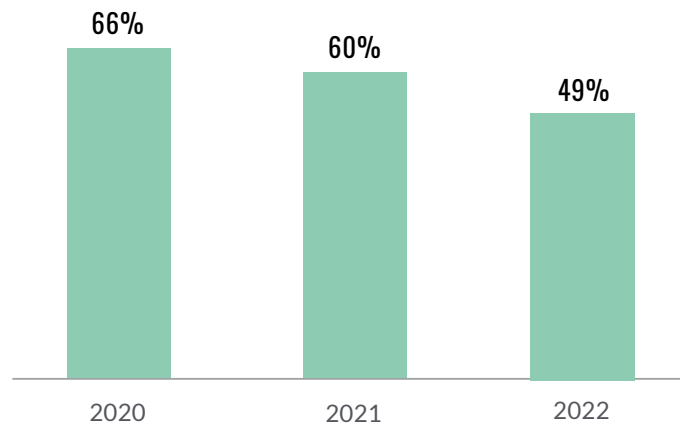
An on-campus experience is the top choice for half of respondents (49%) seeking a bachelor's degree. But, this preference has declined in popularity since the onset of the pandemic.

In 2021, an on-campus option was sought by 60% of respondents, and the share was even greater (66%) in the 2020 survey, which surveyed prospective students in late fall of 2019, prior to COVID-19.

Still, many of today's prospective students remain interested in a hybrid option (36%), and 19% of bachelor's degree-seeking students intend to take their coursework entirely online – ratios that aren't vastly different from those of 2021 and 2020 surveys.

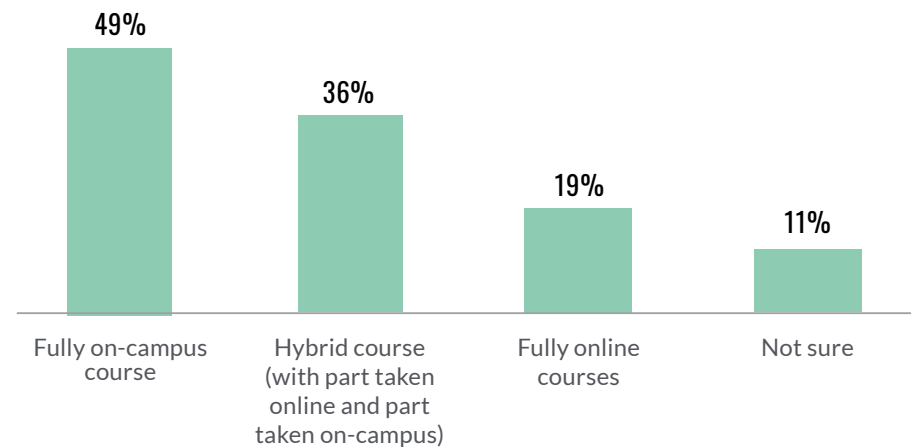
Meanwhile, 11% of current prospective undergraduate students are uncertain of their preferred delivery format.

STUDENT INTEREST IN FULLY ON-CAMPUS COURSES CONTINUES TO DECLINE



WHAT IS YOUR PREFERRED DELIVERY FORMAT FOR A BACHELOR'S DEGREE PROGRAM?

Select all that apply

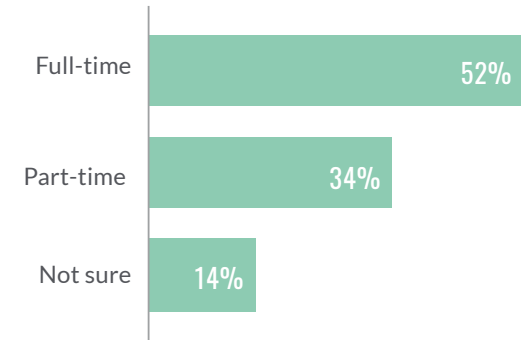


SCHEDULING NEEDS FOR STUDENTS

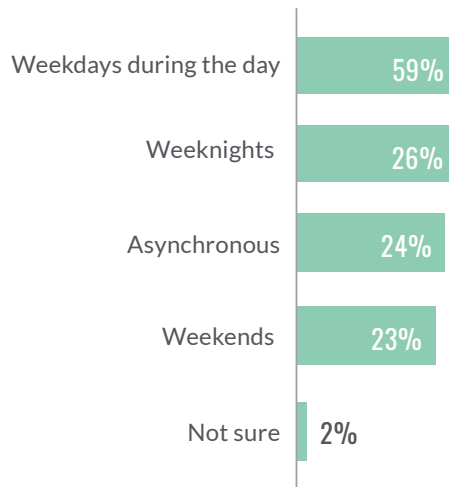
A full-time course load remains the preferred option for most prospective students (52%). One-third (34%) of respondents want part-time enrollment, while 14% aren't sure which option they want.

When it comes to the class schedule, online students express a wider degree of flexibility. Students looking for an in-person course are interested in a more traditional schedule, with 84% interested in weekday classes, while only 59% of prospective online students are interested in this arrangement.

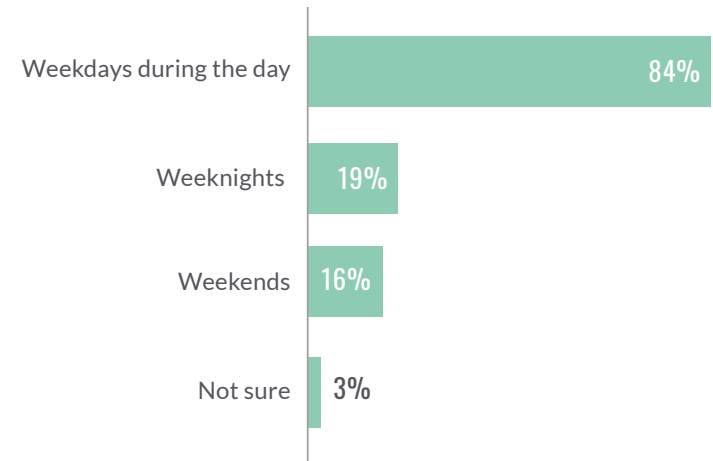
WOULD YOU PREFER TO ENROLL FULL- OR PART-TIME?



WHICH OF THE FOLLOWING TIMES WOULD YOU BE INTERESTED IN AN ONLINE CLASS?



WHICH OF THE FOLLOWING TIMES WOULD YOU BE INTERESTED IN AN ON-CAMPUS COURSE?



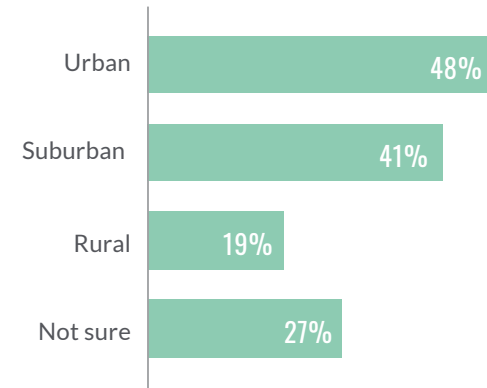
LOCATION AND DISTANCE PREFERENCES

When it comes to the top geographic areas where prospective students would like to attend a college or university, urban and suburban settings (48% and 41%, respectively) lead the way. Only 19% of respondents expressed interest in attending a program in a rural area.

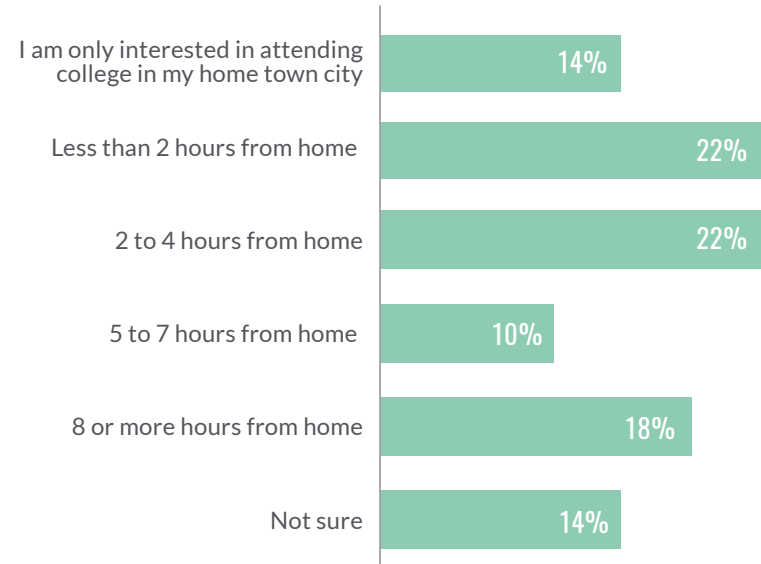
Many are also looking to travel beyond their immediate surroundings, a sign that some level of comfort is returning as COVID-19 safety precautions and vaccination efforts continue. Roughly one in five prospective students (or 22%) would drive as far as four hours to attend their chosen institution, a slight uptick from 2021 responses.



IN WHICH OF THE FOLLOWING GEOGRAPHIC AREAS WOULD YOU CONSIDER ATTENDING COLLEGE?



HOW FAR FROM HOME WOULD YOU BE WILLING TO GO TO ATTEND YOUR PREFERRED INSTITUTION?



THE TAKEAWAY

Interest in hybrid and online-only options means institutions must look beyond the traditional weekday schedule to capture the market share of prospective students seeking flexibility. Likewise, colleges with vibrant urban surroundings or suburban conveniences should market their distinct advantages. Rural institutions with strong communities may also consider this approach when broadening their outreach, especially as more students consider programs further from home.



Is your institution ready to meet evolving student expectations?

Download our webinar recording [Reshaping Recruitment Ahead of the Enrollment Cliff](#) to see how others are identifying new target markets, refreshing recruitment, and launching new programming.





DECISION-DRIVING FACTORS

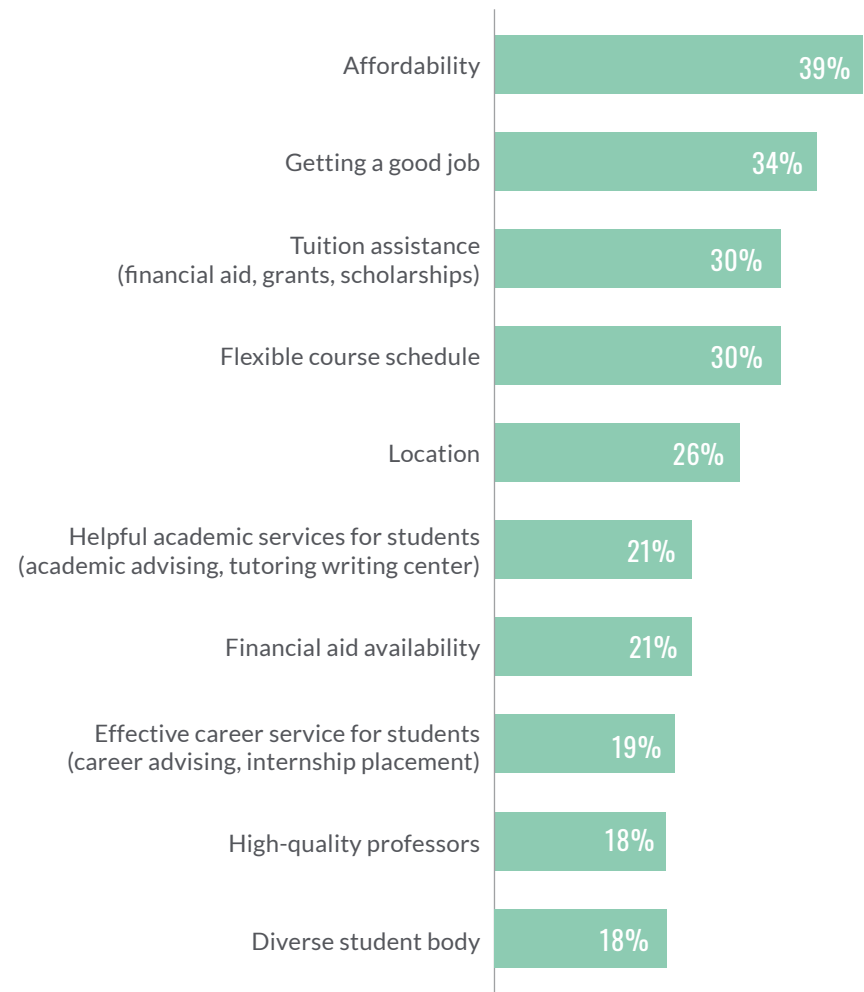
Finances are a key driver of prospective student decisions around where to apply and which college or university to attend.

GETTING RETURN ON INVESTMENT

It should come as no surprise that an institution's affordability is the top factor for prospective students (39%). It's an issue that has short- and long-term implications for attendees. In turn, forward-looking concerns such as getting a good job (34%), tuition assistance (30%), and career services (19%) were among other key factors that influence where students might apply for an undergraduate program. As a result, quality-of-life benefits such as campus attractiveness, extracurricular and athletic offerings, new technologies, and campus facilities were ranked less prominently.



TOP 10 FACTORS WHEN DECIDING WHERE TO APPLY

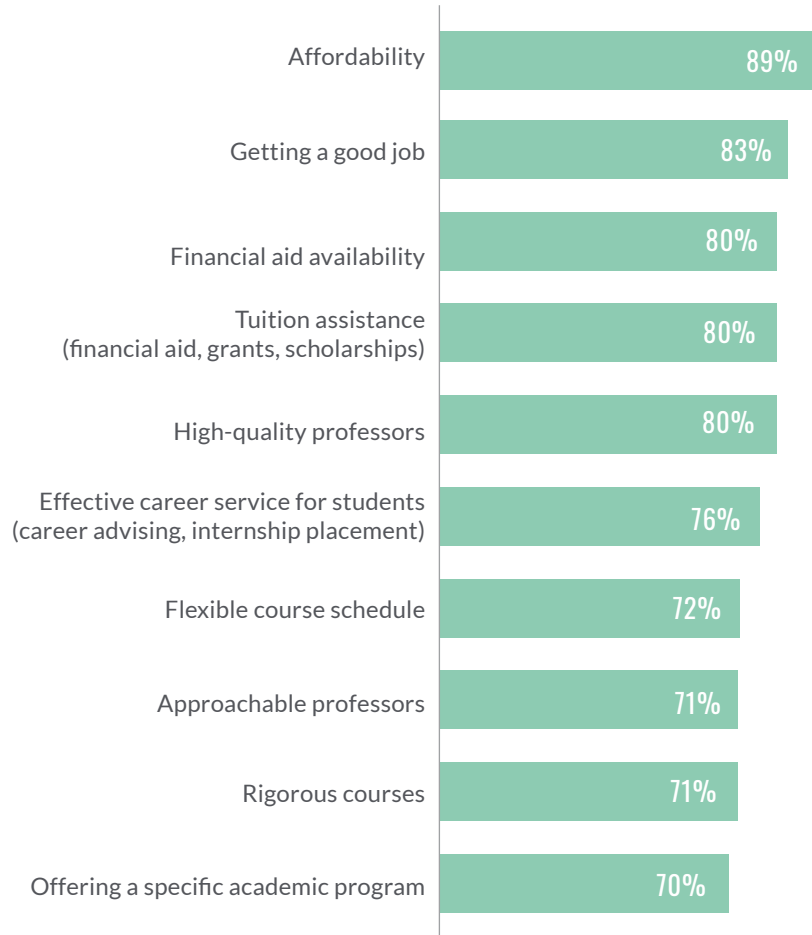


FACTORS INFLUENCING ENROLLMENT

When it comes to choosing a program, prospective students continue to place heavy emphasis on finances and a college's ability to support entrance into the workforce. Respondents overwhelmingly view affordability (89%), getting a good job (83%), financial aid availability (80%), high-quality professors (80%), and effective career services (76%) as very or extremely important factors when making their final decision.



TOP 10 FACTORS THAT INFLUENCE WHICH PROGRAM TO ATTEND



EDUCATIONAL OBJECTIVES

Future earnings remain a key factor for prospective students furthering their education. High salary potential (77%) and enhanced job/resume credentials (71%) were deemed as very or extremely important.

But money isn't everything: Respondents also cited benefits such as exploring academic interests (68%), personal fulfillment (71%), and serving as a role model for their families (57%) as very or extremely important.

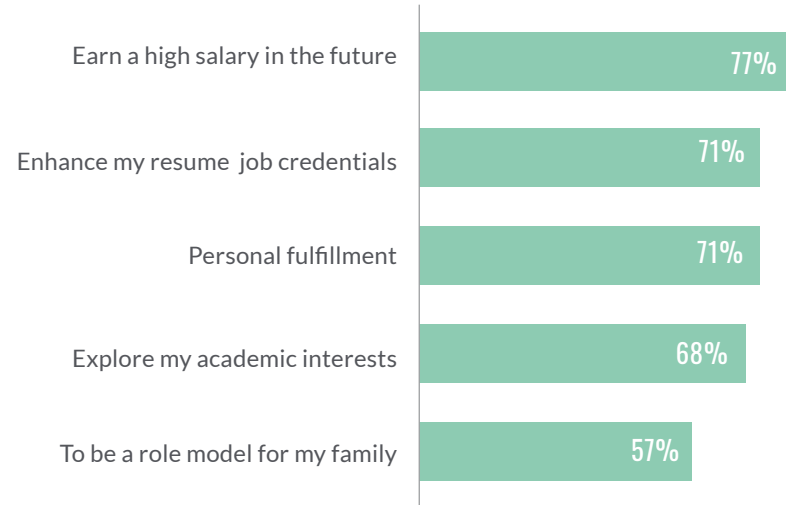
THE TAKEAWAY

The college decision process can be long and complex, with many factors competing for prospective students' attention. Institutions must communicate billing and financial aid issues transparently and actively demonstrate how the investment can deliver long-term career and personal gains.



HOW IMPORTANT ARE EACH OF THE FOLLOWING OBJECTIVES TO YOU WHEN CONSIDERING CONTINUING YOUR EDUCATION?

Select all that apply



Optimize your college or university messaging to address evolving student needs and expectations.

Check out [Higher Ed Branding: 3 Tips to Bolster Your Institution's Messaging](#).



COLLEGE PREPARATION AND ORIENTATION

Prospective students are less confident in their ability to manage the pressures of college life, suggesting more reassurance for first-year success is needed.

PREPARATION CONCERNS

For students completing high school in the midst of the COVID-19 pandemic, many of them feel less confident about their level of preparedness for college. Only about 1 in 3 respondents (38%) feel very or extremely prepared to enter a college or university program.

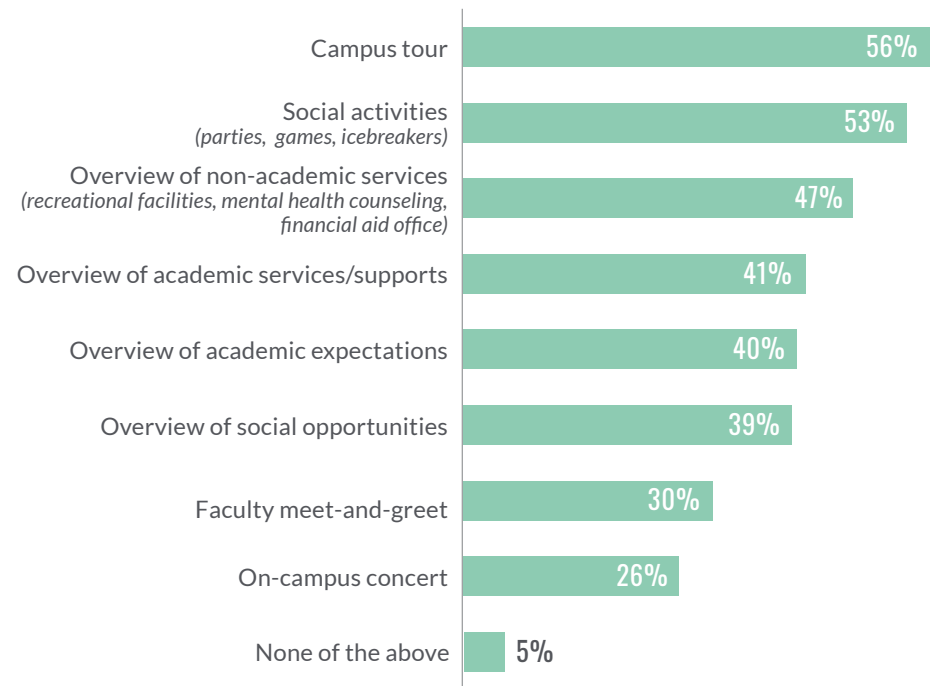
OVERALL, HOW PREPARED DO YOU FEEL TO CONTINUE YOUR EDUCATION AFTER HIGH SCHOOL?



ORIENTATION EXPECTATIONS

For incoming college students, finally setting foot on campus after uneven experiences with in-person learning in high school can stir up feelings of both relief and nerves. Onboarding activities and orientation events can leave a strong impression on students about what the rest of their college experience will be like. Prospective students value up-close college orientation experiences such as campus tours (56%), social mixers with potential peers (53%), and an overview of non-academic services such as recreational facilities and mental health counseling (47%) to help their journeys begin strong.

WHAT WOULD YOU LIKE TO PARTICIPATE IN DURING YOUR PROGRAM'S ORIENTATION?



TOP ACADEMIC AND PERSONAL CHALLENGES

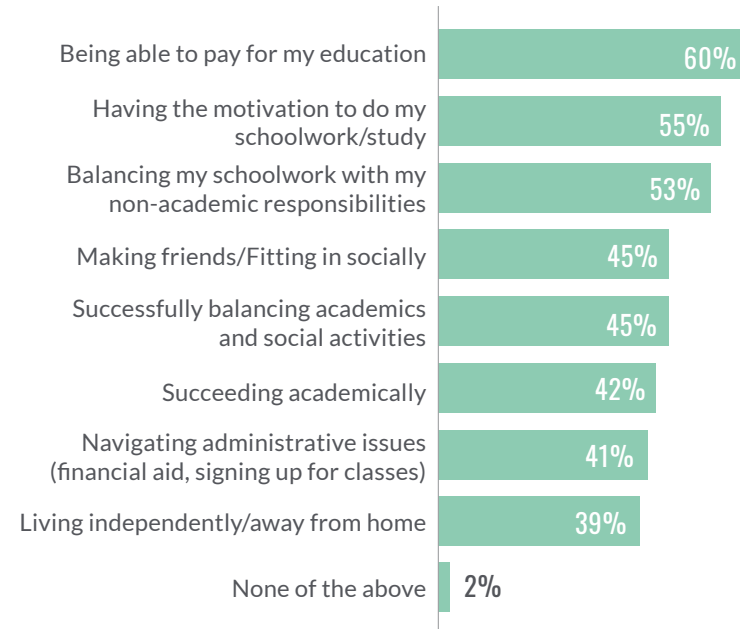
The combination of feeling unprepared academically coupled with their first foray into independent living, could pose a hurdle for many prospective students. Among their top anticipated challenges are discipline and study skills (44%), life duties such as laundry and cooking (34%), interpersonal communication (33%), writing (26%), and critical thinking (25%).

When asked to look ahead to a time when they are enrolled, respondents' academic concerns are heightened. In this scenario, more than half cite concerns about having the motivation to complete schoolwork (55%) and their ability to balance college with non-academic responsibilities (53%). A majority (60%) remain concerned about being able to afford their education.

ARE YOU CONCERNED THAT YOU WILL NOT BE ADEQUATELY PREPARED IN ANY OF THE FOLLOWING AREAS?



THINKING AHEAD TO WHEN YOU ATTEND COLLEGE, ARE YOU CONCERNED ABOUT ANY OF THE FOLLOWING?



THE TAKEAWAY

Colleges and universities must identify the preparation gaps that put applicants at a disadvantage and offer resources to help incoming students tackle them. Similarly, a personal approach to on-campus orientation activities can help students ease the transition and identify academic and personal resources for success.

In sum, institutions that focus on providing inclusive messaging, robust support services, and strong orientation and first-year programming will reassure students that your college or university is ready to walk alongside them toward success.



Build an inclusive, equitable campus community with data-informed practices.

Download the [2022 Higher Education Diversity, Equity, and Inclusion Survey](#).



COMMUNICATION PREFERENCES

In general, prospective students have consistent preferences when it comes to how they want higher education institutions to connect with them.

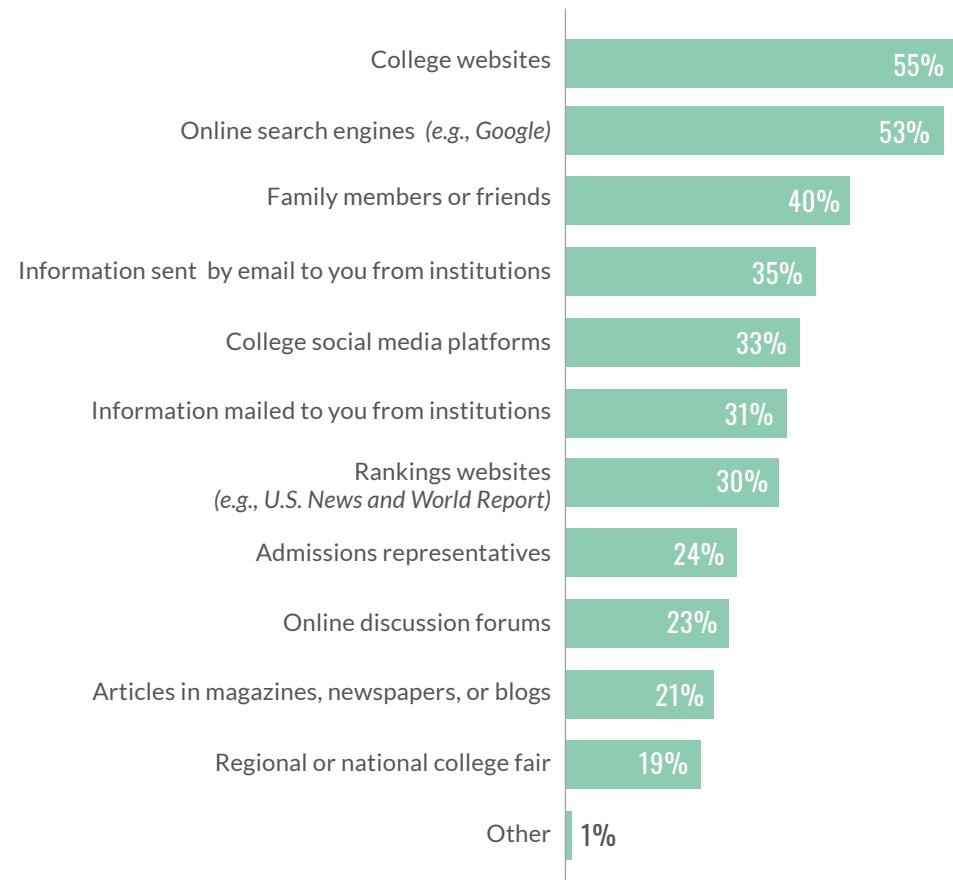
INFORMATION SOURCES

Online resources – including college websites (55%), search engines (53%), and institution’s social media platforms (33%) – remain among the top information-gathering sources for prospective students. For colleges and universities, this suggests the ongoing importance of making intentional investments in digital marketing, website development, and user experience strategy.

Prospective students also value other outreach methods, including emails sent from institutions (35%) and printed information sent via mail (31%). In addition, word of mouth remains a trustworthy pipeline, with 40% of respondents citing insights from friends and family as a primary resource.

WHEN RESEARCHING HIGHER EDUCATION INSTITUTIONS, WHAT ARE YOUR PRIMARY SOURCES FOR GATHERING INFORMATION?

Select all that apply

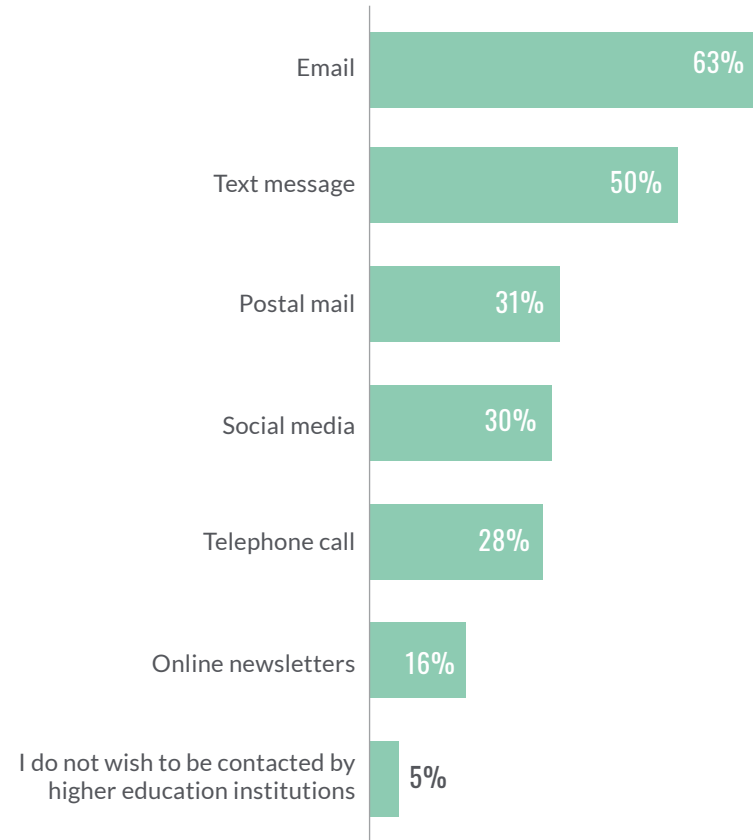


HOW TO REACH THEM

Despite some recent studies showing that young people have a low preference for using email, 63% of prospective students say they prefer it for receiving communications from higher education institutions. And despite the prevalence of social media use, it ranks below text message (50%) and postal mail (31%); only 30% of respondents want to be contacted by a college or university via a social media platform.



IN WHICH OF THE FOLLOWING WAYS WOULD YOU PREFER TO RECEIVE COMMUNICATION FROM HIGHER EDUCATION INSTITUTIONS?



SOCIAL MEDIA

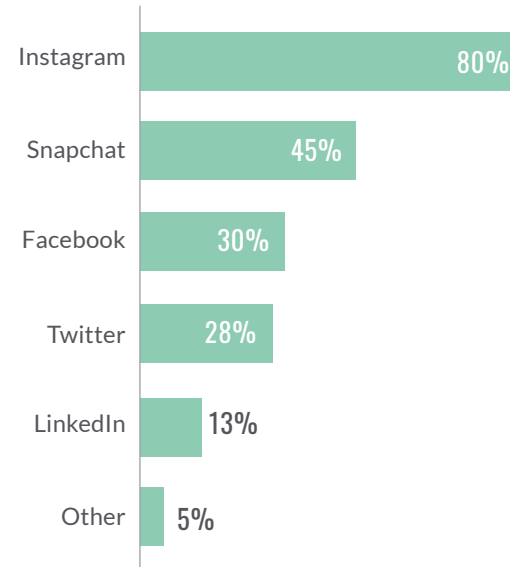
A simple image or video can deliver an impactful message. That connection is underscored by the fact that 80% of prospective students view Instagram as their top social media platform for receiving communications from higher education institutions. Other – but far less popular – sources include Snapchat (45%), Facebook (30%), Twitter (28%), and LinkedIn (13%).

THE TAKEAWAY

To effectively reach applicants in their preferred digital channels, institutions must strategically curate their outreach to include a robust website, strong search-engine optimization, highly visual social media posts, and personalized targeting via email and printed materials.



PLEASE SELECT THE SOCIAL MEDIA PLATFORMS THROUGH WHICH YOU PREFER TO RECEIVE COMMUNICATIONS FROM HIGHER EDUCATION INSTITUTIONS



Create cohesive and effective messaging for prospective students while avoiding internal roadblocks.

Watch our webinar on [Building a Cohesive Brand Identity Across the University](#) to work better together.



CONCLUSION

MEET STUDENTS WHERE THEY ARE

Elements of normalcy are returning to the college experience, and most prospective students still want to earn a four-year bachelor's degree on campus. But pandemic-related shifts exposed students to remote and hybrid learning, ultimately boosting their comfort and confidence in digital tools along with a growing interest in flexible scheduling and degree types.

Meanwhile, the challenges of recent years have also left many enrollees feeling unprepared to face the academic and personal demands of college life. Institutions must understand these evolving issues to ensure continued enrollments and long-term success for the individuals who choose to attend.



STUDENTS WANT LONG-TERM RETURNS ON THEIR INVESTMENT

Affordability continues to rank as the top concern for prospective students, with other key needs related to an institution's ability to improve their employability and high earning potential. Financial concerns aren't only present after graduation: The study found that 60% of respondents worry about being able to afford their education during their enrollment, which means academic programs must clearly communicate pricing and financial aid options throughout the entire process. This approach is also key for first-generation students, who are significantly more likely to view affordability as a deciding factor in their search.

SUPPORT SERVICES ARE CRITICAL TO FILL KNOWLEDGE GAPS

Academics, social skills, and the demands of independent living continue to pose a challenge for prospective students transitioning from home. Nearly one in four respondents say they're very or extremely unprepared to continue their education, with key gaps in study, interpersonal, and critical thinking skills, among many others. Institutions and high schools both must provide and promote robust support services, success skills coaching, and transitional guidance. Colleges can market these critical resources as part of their value proposition to attract enrollees who are concerned about catching up and maximizing their investment.

INSTITUTIONS MUST DELIVER FLEXIBLE SCHEDULES AND DEGREE TYPES

With one-third of prospective students interested in hybrid options, and nearly 20% seeking online-only coursework, it's important for colleges and universities to deliver robust digital options. And because many respondents – even some who prefer an in-person experience – want to take evening and weekend courses, institutions should broaden their scheduling to reach them. To that end, institutions must also understand shifting demands among students considering multiple degree types and leverage their own strengths to market their offerings effectively.



Find out what moves potential students from applicants to enrollees. Read the [2022 National Admitted Student Survey](#).





APPENDIX: SURVEY METHODOLOGY AND RESPONDENT CHARACTERISTICS

SURVEY METHODOLOGY

Survey Administration and Sample

- The survey was administered online in July of 2022 using the Qualtrics platform.
- The analysis includes a total of 1,044 respondents following data cleaning.
- Respondents were recruited through a panel company.

Respondent Qualifications

- Must be 16-19 years old.
- Must live in the United States.
- Must be a high school student currently enrolled as a sophomore or junior.

Methodology

- The results presented in this report include aggregate results as well as results segmented by race/ethnicity, two-year or four-year institution, private or public institution, and gender.
- Sample sizes vary across questions as some questions only pertain to a subset of respondents.
- Conclusions drawn from a small sample size ($n < 20$) should be interpreted with caution.
- For full aggregate and segmented results, please consult the accompanying data supplement.
- Statistically significant differences (95% confidence level) between groups are noted with an asterisk (*).
- After data collection, Hanover identified and removed low-quality respondents.
- “Don’t Know or Not Applicable” responses, and equivalent, are often excluded from the figures and analysis in order to focus on respondents who did express an opinion.



RESPONDENT CHARACTERISTICS



High School Standing (n=1,044)

Sophomore	18%
Junior	82%



Income (n=1,044)

Under \$25,000	14%
\$25,000 to \$49,999	13%
\$25,000 to \$49,999	11%
\$75,000 to \$99,999	8%
\$100,000 to \$149,999	17%
\$150,000 to \$199,999	4%
200,000 or more	4%
Not sure	18%
Prefer not to respond	11%



United States Region (n=1,042)

South	40%
West	25%
Mideast	21%
Northeast	16%



Race/Ethnicity (n=1,044)

White	47%
Black or African American	31%
Hispanic or Latino (o/a/x)	20%
Asian	7%
American Indian or Alaskan Native	4%
Native Hawaiian or Pacific Islander	1%
Middle Eastern or North African	1%
Not listed/Prefer to self-describe	2%
Prefer not to respond	3%



Gender Identity (n=1,044)

Female	70%
Male	22%
Non-binary/Gender non-conforming	5%
Not listed/Prefer to self-describe	1%
Prefer not to respond	2%



First-Generation Status (n=942)

Yes, both	41%
Yes, one parent	25%
No	24%
Don't Know	7%
Prefer not to respond	3%



ABOUT HANOVER RESEARCH

Hanover helps higher education institutions address their greatest challenges through comprehensive insights, meaningful analysis, and actionable recommendations. Using a broad array of best-practice research methodologies, we help higher education leaders make informed decisions, identify opportunities, and heighten their effectiveness.

OUR BENEFITS



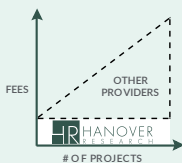
EXPERT
200+ analysts with advanced multiple methodology research expertise



FLEXIBLE
Ongoing custom research agenda adapts with organizations' needs



DEDICATED
Exclusive account and research teams ensure strategic partnership



EFFICIENT
Annual, fixed-fee model shares costs and benefits

OUR HIGHER EDUCATION SOLUTIONS

ENROLLMENT MANAGEMENT

Optimize your entire enrollment funnel from enhancing prospective student recruitment to maximizing applicants and matriculants.

ACADEMIC PROGRAMMING

Build a standout academic program portfolio based on student preference and employer demand.

STUDENT SUCCESS

Increase retention and maximize student engagement from start date to graduation.

OPERATIONS & FINANCE

Obtain comprehensive insights to run an efficient, financially sustainable institution.

ADVANCEMENT

Identify right-fit donors and maximize giving from your key stakeholders.

MARKETING

Understand your institution's value proposition—and communicate it through messaging that resonates.

GRANTS

Targeted guidance to bolster the quality, volume, and success rates of your grant applications.

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