

A close-up photograph of a black graduation cap with a tassel, resting on a stack of books. A rolled-up diploma tied with a red ribbon is placed on top of the cap. The background is softly blurred.

NATIONAL ADMITTED STUDENT SURVEY

July 2020

INTRODUCTION

The COVID-19 crisis has injected an array of uncertainties into higher education, complicating the admissions process for both institutions and students. While meeting recruitment targets has always been a top priority for higher education providers, the need for early clarity on enrollment decisions has never been stronger. Thus, it is imperative that colleges and universities understand the real-time intention and ability of admitted students to enroll in the fall so that institutions can continuously review and update their enrollment strategies.

To assist institutions in gathering real-time information on enrollment intentions, Hanover Research conducted a survey of almost 1,000 students who have been admitted to a college or university in the U.S. for Fall 2020. The survey examines the impact of the COVID-19 crisis on students' education plans, their current likelihood to enroll in an institution in the fall, alternate options they may consider, and their perceptions of virtual learning. The following report presents the results from this survey.

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KEY FINDINGS

- 1. The admissions outlook for Fall 2020 may be healthier than anticipated.**
 - **Recommendation:** Continue to monitor enrollment numbers throughout the summer to identify and plan for enrollment melt. Employ multiple channels to engage with and keep admitted students on track for the fall.
- 2. Non-degree-seeking and international students are the most likely to report being adversely impacted by COVID-19, as reflected by their reduced likelihood to enroll in their selected program.**
 - **Recommendation:** Invest in resources to better understand the unique challenges of these student populations and develop solutions to address them properly.
- 3. Students are not questioning the value of post-secondary education. If their original plan must be reconsidered, students would generally seek alternative enrollment options.**
 - **Recommendation:** Allow students to defer matriculation for extenuating circumstances and clearly communicate the options to all stakeholders. Consider a fully remote program to attract domestic students who are concerned about affordability and proximity to home.
- 4. Admitted students value in-person admission events to inform their enrollment decision, but would be content with digital substitutes.**
 - **Recommendation:** Conduct virtual campus visits, information sessions, and new student orientation in lieu of in-person events. Implement [best practices in virtual admissions](#) to attract more prospects and optimize the value of these events for participants.
- 5. Graduate students are among the most optimistic about the shift to online classrooms.**
 - **Recommendation:** Emphasize the school's virtual readiness to encourage these students to enroll. Prepare to support students for a remote term, including technological, pedagogical, and social factors.
- 6. By contrast, undergraduate and non-degree-seeking students express reserved interest in virtual learning and skepticism about its value.**
 - **Recommendation:** Ensure continuity and quality of support by [transitioning student services to online delivery](#). Create online social spaces that foster student interactions both in and outside of classrooms.

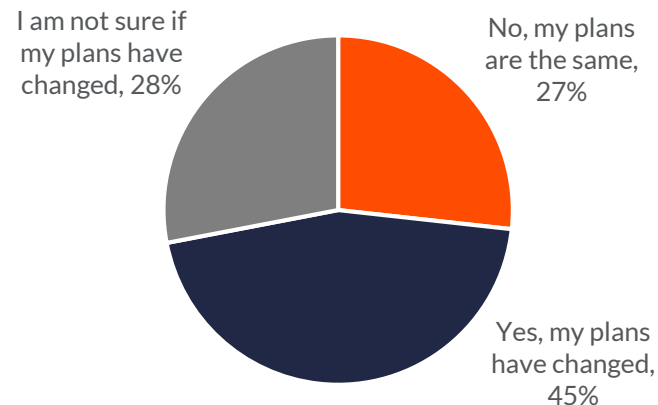
FALL 2020 ENROLLMENT PLAN

ENROLLMENT DECLINES RESULTING FROM COVID-19 ARE LIKELY TO BE LESS SIGNIFICANT THAN ORIGINALLY FEARED.

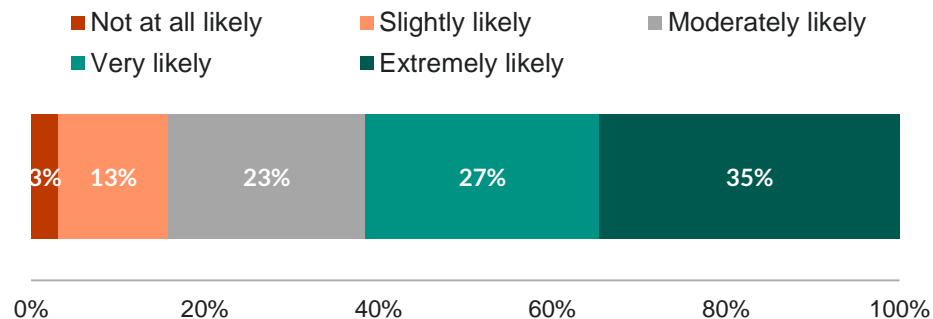
Although the public health crisis caused a large proportion of incoming students to reconsider their plans, the vast majority remain likely to enroll in the fall. Specifically, (84%) report remaining at least “moderately likely” to enroll in their chosen college/university. This suggests that institutional efforts to engage with admitted students in the wake of the pandemic were largely effective.

Notably, at the time of survey administration a substantial proportion of admitted students (28%) remained uncertain about how COVID-19 would change their enrollment plans. It is likely that this audience will continue monitoring the status of their preferred institutions before making a final decision on where to enroll.

Has COVID-19 impacted your plans for your education in Fall 2020?
(n=946)



What is your current likelihood of attending your college/university of choice?
(n=946)

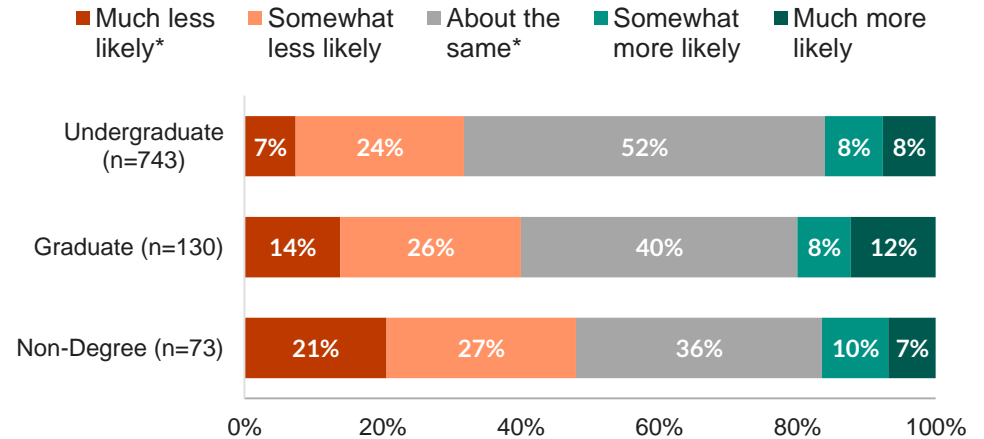


THE PANDEMIC HAS HAD AN UNEVEN IMPACT ACROSS AWARD LEVELS.

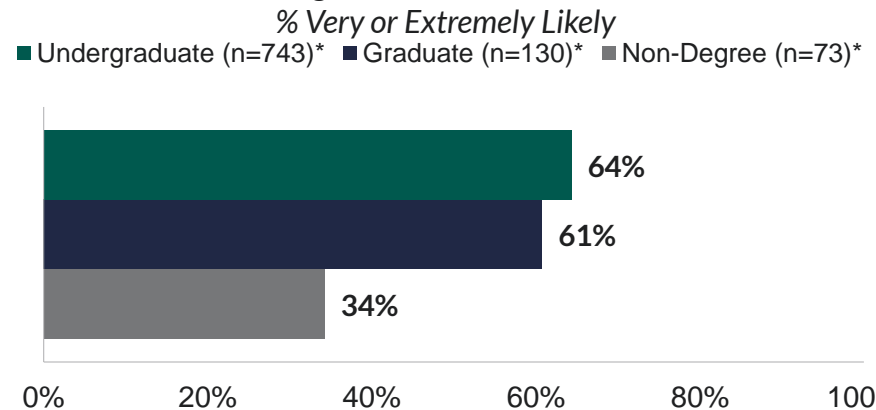
Undergraduate enrollment plans appear particularly resilient in the face of COVID-19. More than two-thirds of admitted undergraduates report being at least as likely to attend college or university in the wake of COVID as they were before it. Moreover, a similar proportion indicate that they are very or extremely likely to attend in the fall. Trends among admitted graduate students are broadly similar, though a higher proportion (40%) indicate they are less likely to attend.

By contrast, incoming non-degree students' enrollment choices have shifted dramatically. Almost half (48%) of non-degree learners report being less likely to attend their institution of choice due to COVID-19, and only a third (34%) are likely to attend their chosen program in the fall.

Are you any more or less likely to attend your college/university of choice as a result of COVID-19?



What is your current likelihood of attending your college/university of choice?



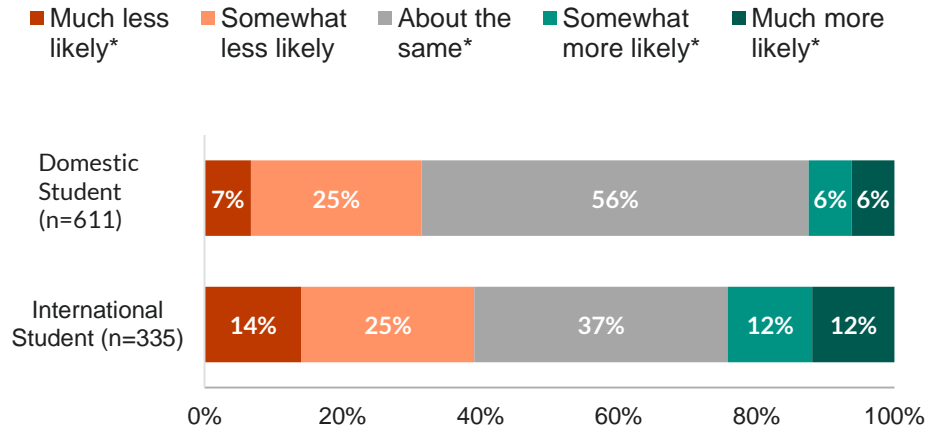
* indicates statistically significant differences between segmented groups.

COVID-19 AFFECTS INTERNATIONAL STUDENTS' EDUCATION PLANS SIGNIFICANTLY MORE THAN DOMESTIC STUDENTS.

The majority (56%) of domestic learners do not report changes to their likelihood to attend their chosen program in the fall. At the time of the survey, two-thirds (67%) of these respondents also expressed confidence in their fall enrollment.

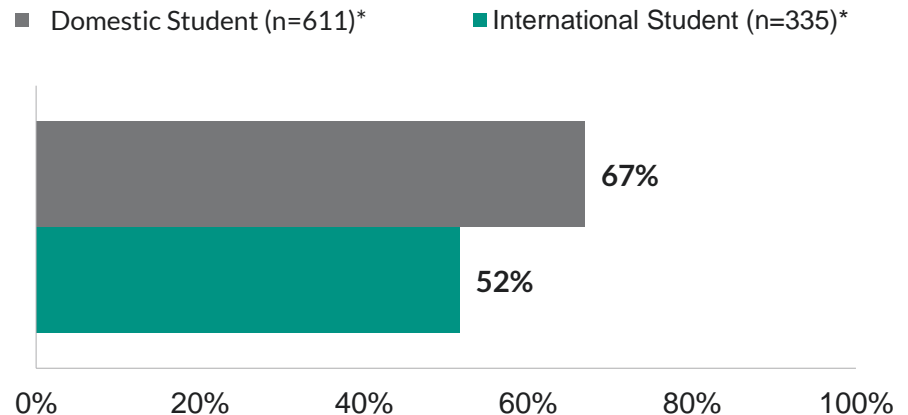
Meanwhile, approximately four in 10 international students (39%) say they are less likely to enroll in the fall and only (37%) say they are as likely to do so. Although a notable proportion (24%) of international students also say they are now *more* likely to attend college than they were previously, overall, only half (52%) of international students currently plan to enroll in their chosen institution for Fall 2020.

Are you any more or less likely to attend your college/university of choice as a result of COVID-19?



What is your current likelihood of attending your college/university of choice?

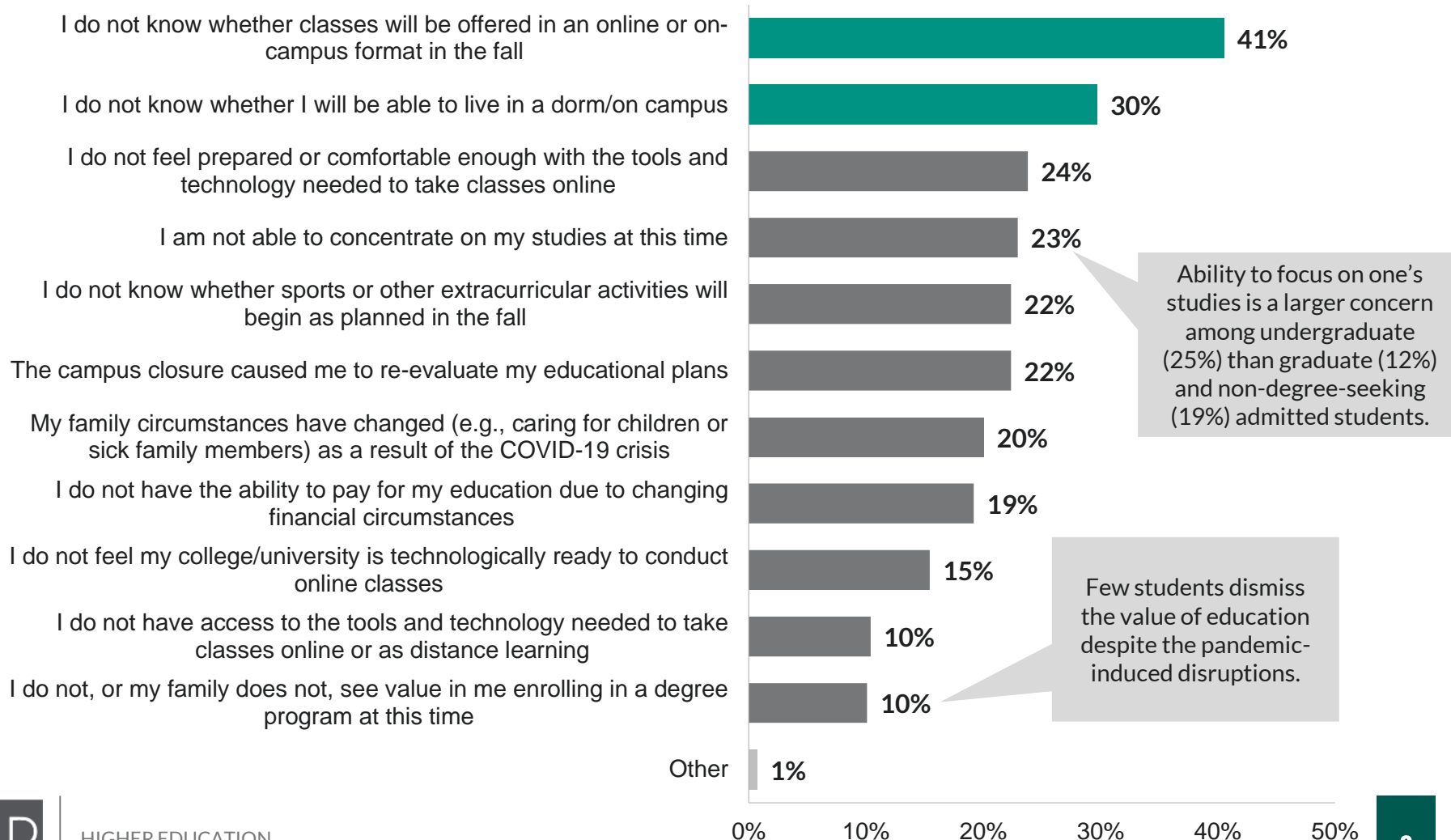
% Very or Extremely Likely



UNCERTAINTY AROUND THE DELIVERY FORMAT AND LIVING SITUATION HINDERS STUDENTS' ENROLLMENT PLANS IN THE FALL.

Which of the following factors related to the COVID-19 crisis may have impacted your plans for the coming academic year? Please select all that apply.

(n=693)



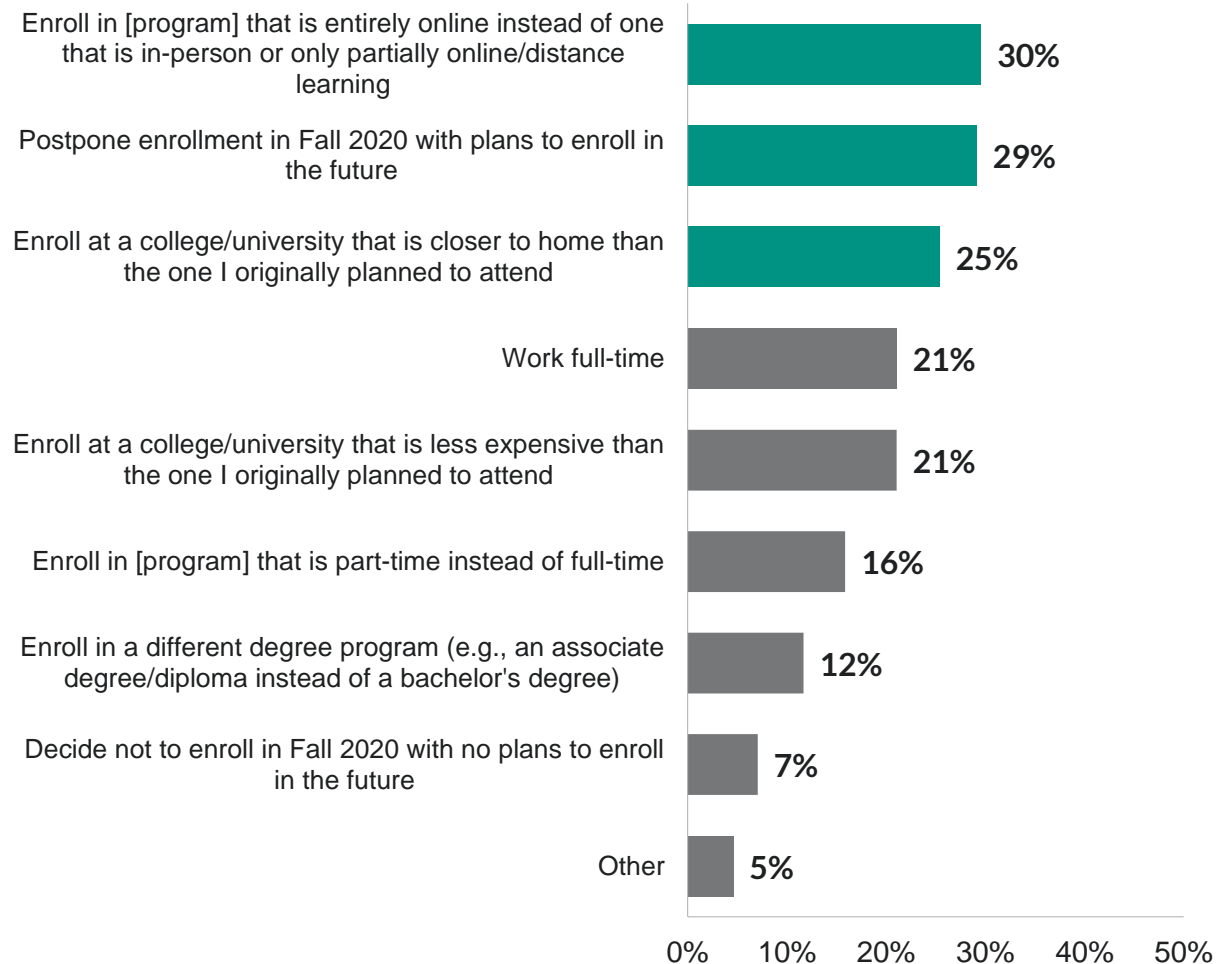
STUDENTS SEEK ALTERNATE OPTIONS WHILE STILL PRIORITIZING HIGHER EDUCATION.

Admitted students whose plans have changed or might be changing are considering a range of alternatives for the fall. These individuals largely prefer options that would still see them enrolled in the coming semester. For example, **almost a third (30%) of incoming students are considering a fully online program alternative and one in four is considering a option that is closer to home.**

A significant number of admitted students (29%) might postpone their enrollment until a later date. However, very few (7%) are considering walking away from post-secondary education entirely.

Which of the following might you do instead of what you originally planned as a result of COVID-19? Please select all that apply.

(n=693)



Note: Only respondents whose plans had changed or who were unsure of changes to their plans saw this question.

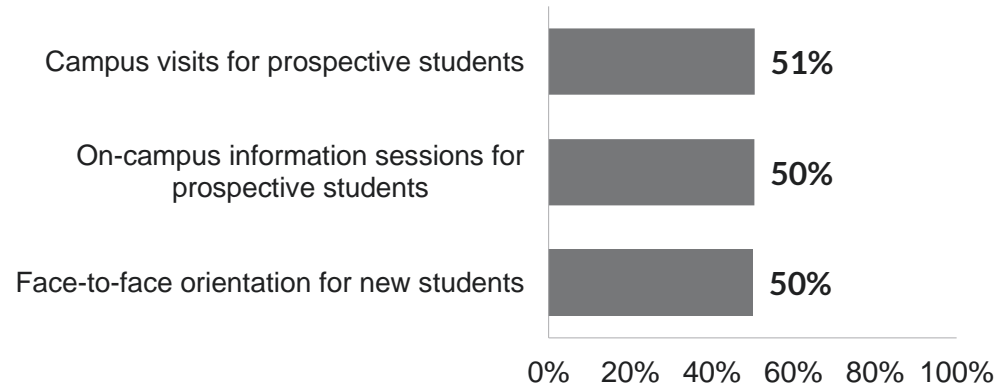
ADMISSION EVENTS

VIRTUAL ADMISSION EVENTS ARE AN ACCEPTABLE SUBSTITUTE FOR IN-PERSON EVENTS.

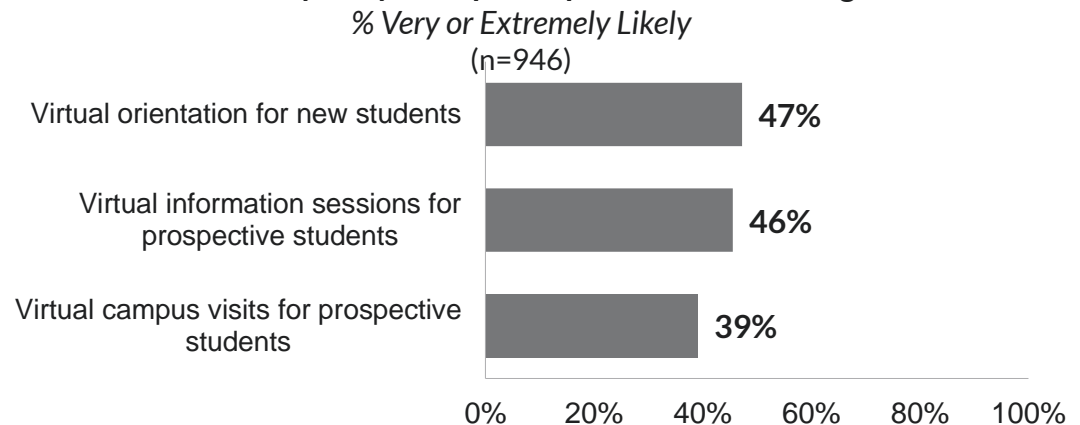
Prospective students have mixed perceptions of the value of traditional recruiting and welcoming events, such as campus visits and orientation sessions. While half of respondents describe these events as very or extremely important, an equal number consider them less important. If in-person events are not available, most will embrace the digital equivalents. **Nearly half of respondents say they would be very or extremely likely to attend virtual orientation and information sessions, and an additional 30% of respondents would be moderately likely to do each.**

Admitted students are less interested in virtual campus visits. Less than 40% of respondents are very or extremely likely to participate in such an offering, and 10% are not at all likely to do so. Higher education providers will need to put particular emphasis on ensuring the value of virtual campus visits should they remain an ongoing part of the recruitment experience.

How important is the ability to participate in each of the following when deciding which college/university to attend?
% Very or Extremely Important
(n=946)



If your college/university is not able to offer in-person events, how likely are you to participate in the following?
% Very or Extremely Likely
(n=946)



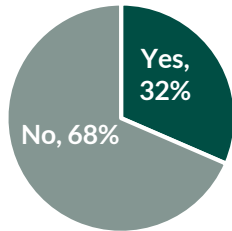
ACADEMIC INTEREST

NON-DEGREE AND INTERNATIONAL STUDENTS ARE MOST LIKELY TO SWITCH THEIR MAJOR OR FIELD OF STUDY DUE TO COVID-19.

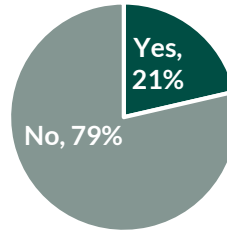
Roughly one-third (32%) of non-degree students claim to have changed their mind about their intended field of study in the fall, compared to less than a quarter of undergraduate (21%) and graduate (23%) students. Notably, international students (42%) are almost four times as likely as domestic ones (12%) to consider a different major given the public health crisis.

Given COVID-19, have you changed your mind about [your] major or field of study?

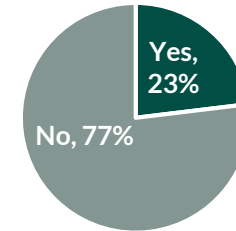
Non-Degree (n=73)*



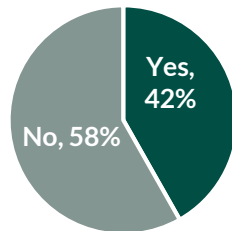
Undergraduate (n=743)*



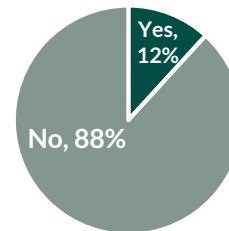
Graduate (n=130)



International Student (n=335)*



Domestic Student (n=611)*



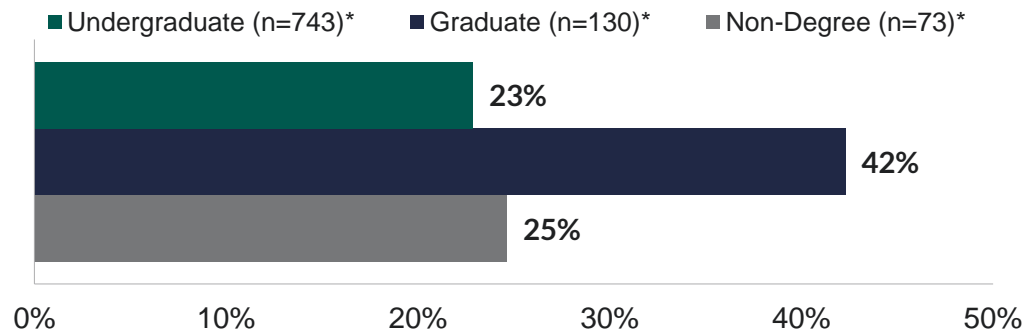
VIRTUAL CLASSROOMS APPEAL MORE TO GRADUATE STUDENTS THAN THEIR COUNTERPARTS.

More than four in 10 admitted graduate students (42%) express interest in online classes, and only a small proportion (12%) have no interest in online learning at all. At the same time, graduate students are less likely to believe that the value of their degree would be diminished by the adoption of virtual classrooms.

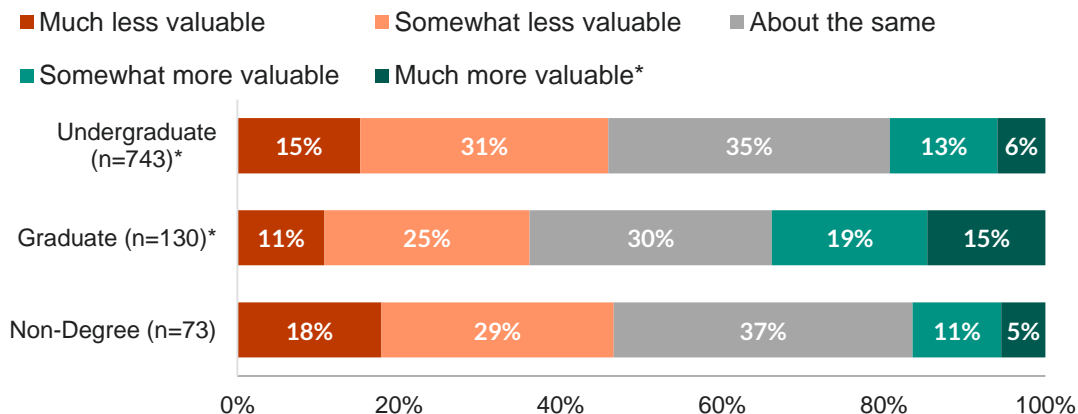
On the other hand, undergraduate and non-degree learners have poor perceptions of distance learning. Only about a quarter of undergraduate (23%) and non-degree (25%) admitted students are very or extremely interested in taking classes online. About half also believe that the transition to online formats reduces the value of their education. This suggests these students may place a high value on the classroom experience of their programs that cannot be transferred online.

What is your current level of interest in taking classes online or as distance learning?

% Very or Extremely Interested
(n=946)



Given the switch colleges/universities have made to primarily or exclusively online/distance learning, how do you think that affects the value of the education you would receive in [your program]?



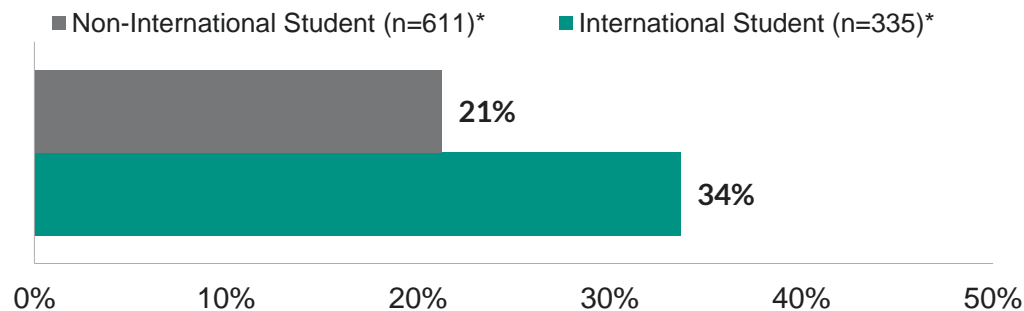
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INTERNATIONAL STUDENTS ARE MORE RECEPTIVE TO ONLINE LEARNING THAN DOMESTIC STUDENTS.

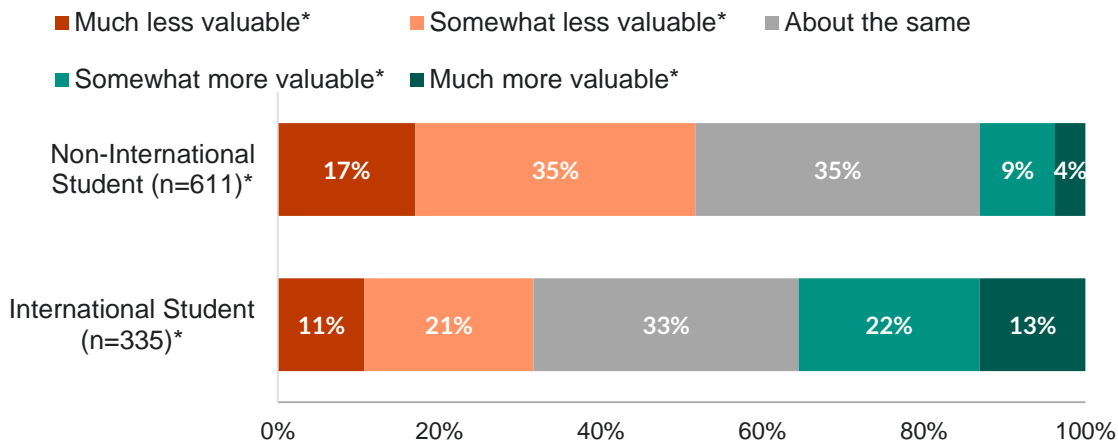
Compared to domestic counterparts at the time of survey administration (May 2020), international students are more interested in online courses and are more likely to feel that distance learning positively affects the value of their education. This result may reveal different priorities: international learners may appreciate the online formats that allow them access to an education abroad despite the pandemic, whereas domestic students may be more occupied with the lost opportunities that are associated with face-to-face interactions. However, it is important to note that the recently announced mandates by the U.S. Immigrations and Customs Enforcement may negatively shift international students' preferences with respect to online learning.

What is your current level of interest in taking classes online or as distance learning?

% Very or Extremely Interested
(n=946)



Given the switch colleges/universities have made to primarily or exclusively online/distance learning, how do you think that affects the value of the education you would receive in [your program]?



* indicates statistically significant differences between segmented groups.

APPENDIX

RESPONDENT CHARACTERISTICS

Age (n=946)



16 to 17	23%
18 to 20	52%
21 to 24	12%
25 to 34	12%
35+	1%

Gender (n=946)



Male	24%
Female	73%

Varsity Athlete (n=946)



Yes	32%
No	68%

Ethnicity (n=919)



Hispanic/Latino	25%
Non-Hispanic	72%

Race (n=919)



White	46%
Black or African-American	34%
Asian	12%
American Indian or Alaskan Native	4%
Native Hawaiian or Other Pacific Islander	3%

First Generation (n=946)



Yes	61%
No	37%

College/University of Choice (n=946)



Public 2-year college/university	16%
Public 4-year college/university, in-state	46%
Public 4-year college/university, out-of-state	19%
Private 4-year college/university, in-state	11%
Private 4-year college/university, out-of-state	8%

SURVEY OVERVIEW

KEY OBJECTIVES

- Evaluate how COVID-19 has impacted the plans of students admitted to US higher education institutions for Fall 2020.
- Understand admitted students' perceptions of online learning and participating in events for new students virtually.
- Compare the results of domestic and international students as well as those of undergraduate, graduate, and non-degree students.

SURVEY ADMINISTRATION & SURVEY SAMPLE

- The survey was administered through a national panel in May of 2020.
- Respondents include students who were recently admitted to a US higher education institution for the fall 2020 term.
- The analysis includes 946 respondents who participated in the survey.
- A selection of results are segmented by international student status (domestic or international student) and/or degree type (undergraduate, graduate, or non-degree).

RESPONDENT QUALIFICATIONS

- Respondents must be admitted to a US college/university for the fall term.