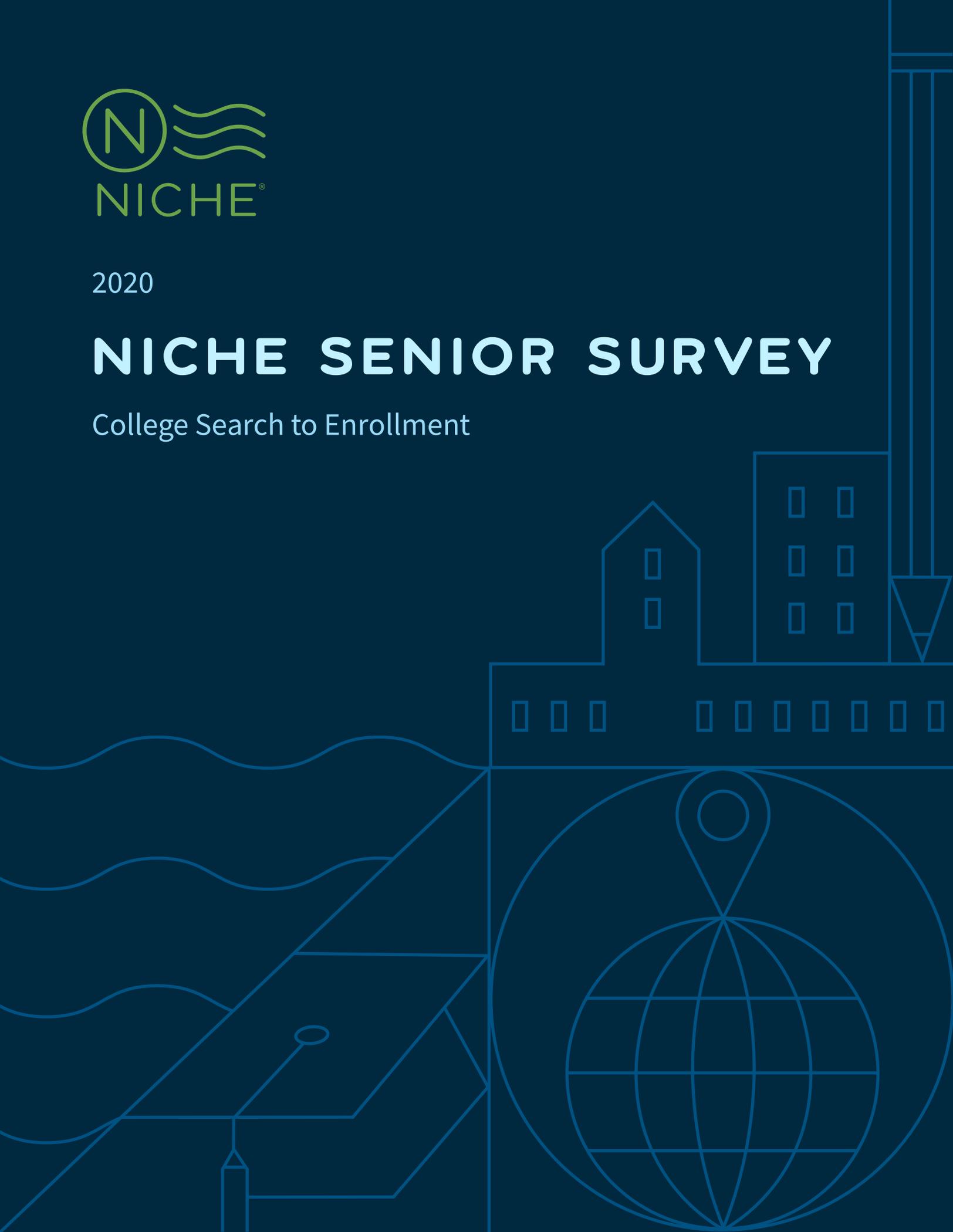




2020

NICHE SENIOR SURVEY

College Search to Enrollment



SUMMARY

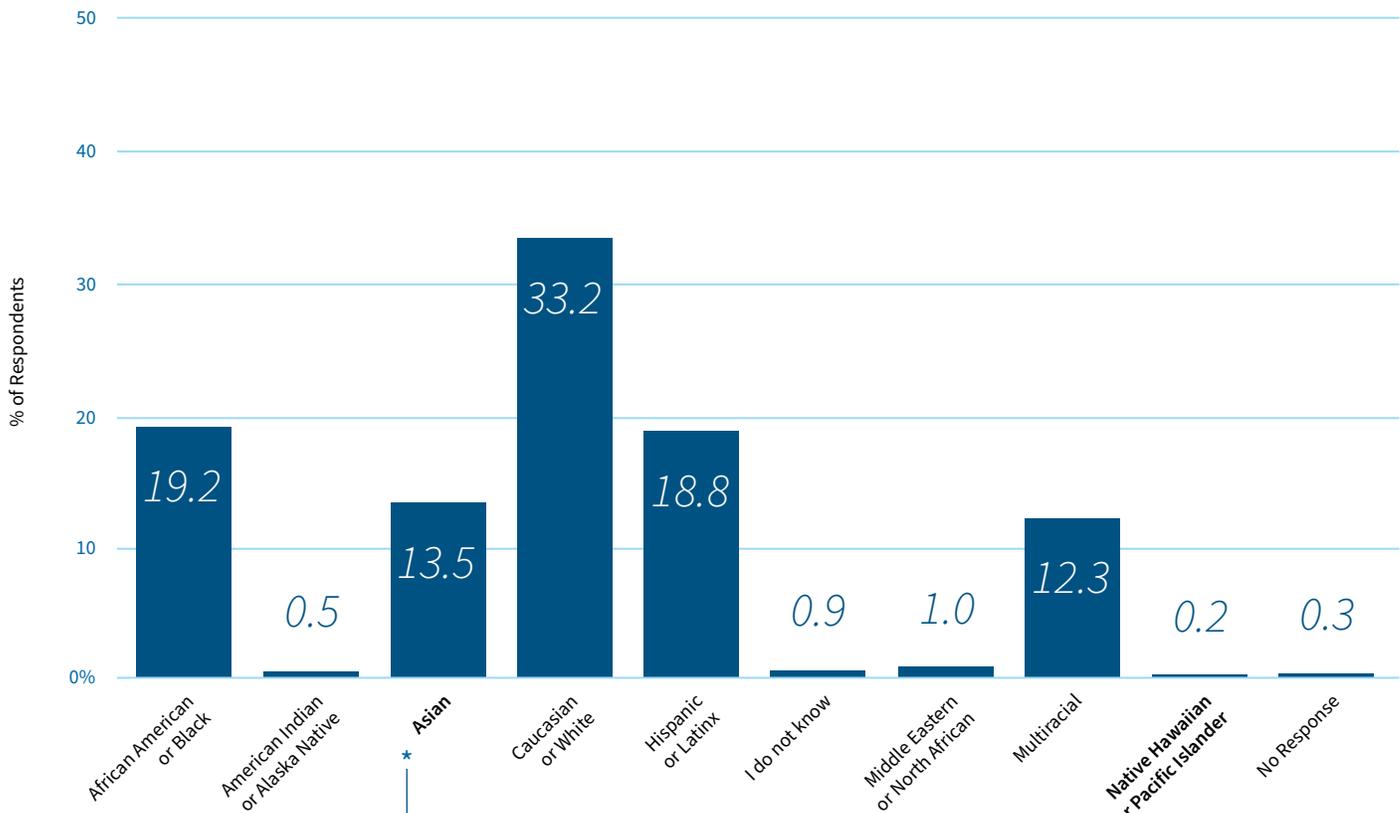
This was the fifth year that Niche has surveyed students to learn more about their college search and decisions. This year's survey was responded to by 18,739 newly minted high school graduates who had made their enrollment decision—or chose not to enroll this year. Some of the biggest takeaways this year were the changes in the modal student, the increase in the trend of students not taking any college visits, the decrease in confidence that they can afford the college at which they are enrolling, and the significant spike in the share of students reporting that they removed colleges from consideration based on the published price.

It's interesting to note that 66.8% of respondents were domestic students of color, which differs from the 39.9% of the US population and the most recent IPEDS data showing 49.7% of enrolled college students were domestic students of color. This year, we strove to improve the reporting of race and ethnicity by offering more options, as detailed by the Southeast Asia Resource Action Center "Everyone Deserves to Be Seen" policy brief among other resources. Throughout this document, and certainly in our interactive charts, you will be able to dig deeper into differences. There were over thirty choices for race and ethnicity, so for the simplicity of some charts in this document they will be grouped; however in the interactive visualizations on the [Niche Enrollment Insights](#) site they will all be available for exploration.

*This year's survey was responded to by **18,739** newly minted high school graduates who had made their enrollment decision.*



RACE OR ETHNICITY OF RESPONDENTS



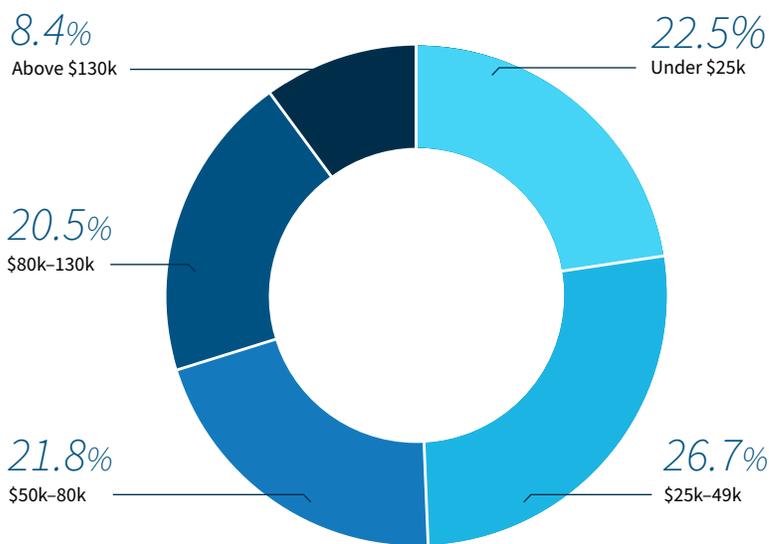
Students reported being **more diverse** than the US population. Students responding as Asian or Native Hawaiian or Pacific Islander were able to more accurately represent their heritage.

| | |
|--------------|-------|
| Asian Indian | 18.3% |
| Bangladeshi | 3.4 |
| Bhutanese | <0.1 |
| Burmese | 1.0 |
| Cambodian | 1.5 |
| Chinese | 25.1 |
| Filipino | 16.1 |
| Hmong | 1.6 |
| Indonesian | 0.6 |
| Japanese | 4.1 |
| Korean | 9.1 |
| Laotian | 0.7 |
| Malaysian | 0.5 |
| Mongolian | 0.2 |
| Nepalese | 1.1 |
| Pakistani | 3.6 |
| Sri Lankan | 0.3 |
| Thai | 0.9 |
| Vietnamese | 11.9 |

| | |
|-----------------------|-------|
| Fijian | 12.9% |
| Guamanian or Chamorro | 15.2 |
| Marshallese | 3.0 |
| Native Hawaiian | 46.2 |
| Samoan | 15.9 |
| Tongan | 6.8 |

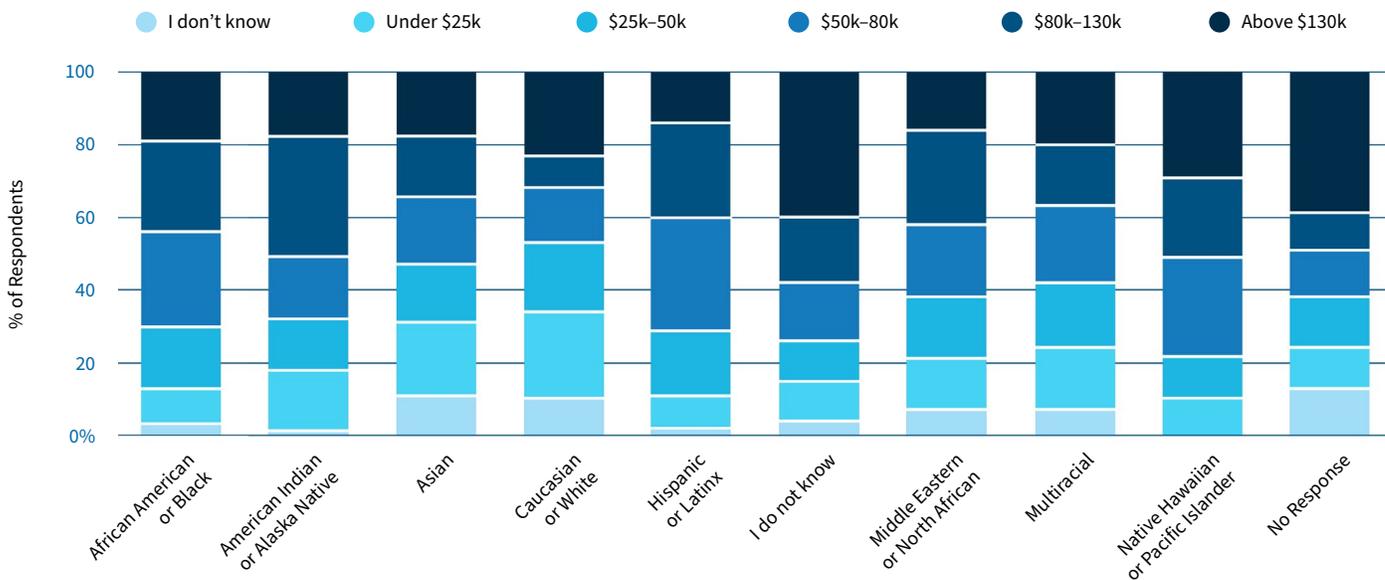


HOUSEHOLD INCOME QUINTILES

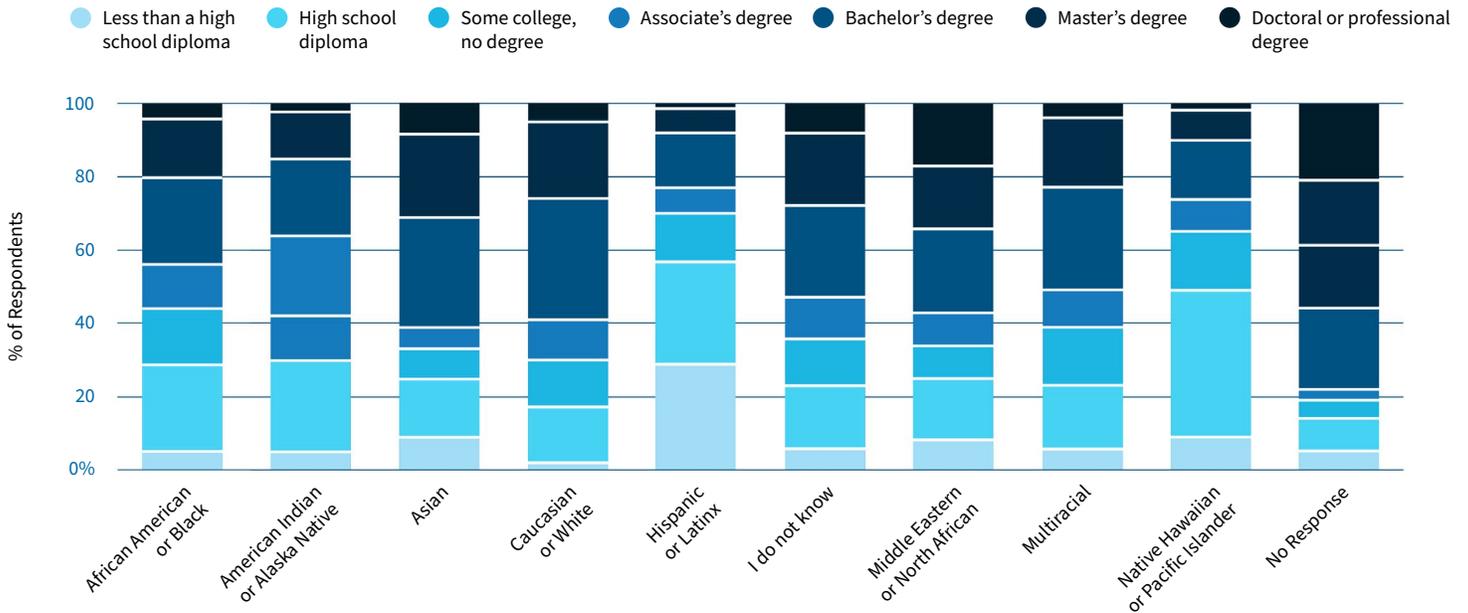


Overall, 20.1% of students did not know their household income, but of those who did the percentages closely mirrored US quintiles with the exception of the top quintile which was underrepresented in responses at 8.4%. Caucasian and Asian respondents had the most respondents in the top two income quintiles while Hispanic or Latinx, African American or Black, and American Indian or Alaska Native students were the most likely to fall into the bottom two quintiles. Within Asian students the results varied significantly by subgroup. Less than 5.0% of Bhutanese, Burmese, Indonesian, or Mongolian students were in the top two quintiles while over 40.0% of Indian, Japanese, and Malaysian students were. What is unexplained at this point are the results showing that for almost every group earnings are higher for multiracial Asian students.

HOUSEHOLD INCOME BY RACE OR ETHNICITY

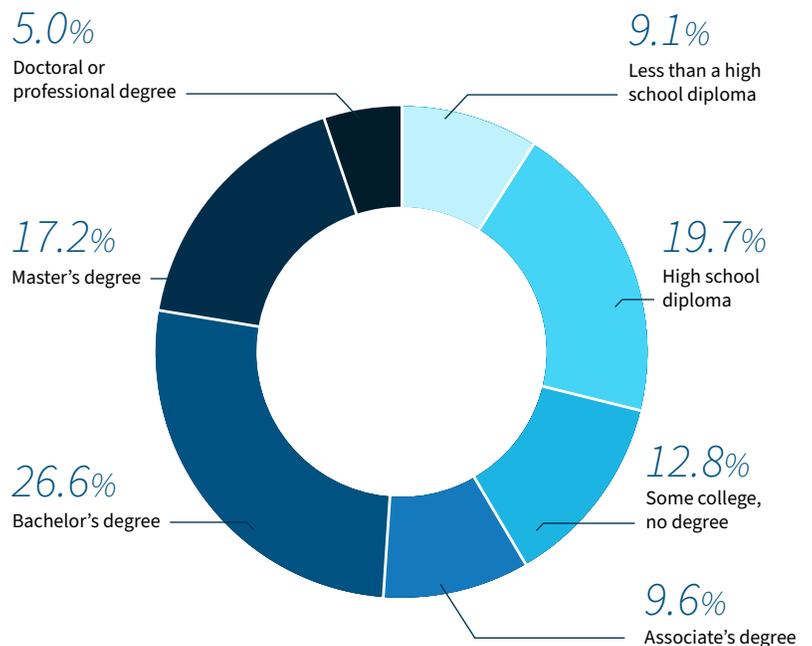


HIGHEST EDUCATIONAL ATTAINMENT OF PARENTS BY RACE OR ETHNICITY



Student responses as to their parents' education level closely resembles most areas of the most recent US Census data with more students having a parent with a Master's degree and fewer with parents who have a high school diploma. Hispanic or Latinx students and Native Hawaiian or Pacific Islander students were the least likely to come from households where at least one parent had more than a Bachelor's degree and Middle Eastern or North African and Asian students were the most likely to. As we saw with income levels, the divide within Asian students was quite high. While Indian, Japanese, Korean, and Sri Lankan students all reported more than 40.0% with a post-baccalaureate degree, Bhutanese, Cambodian, Laotian, and Malaysian students all reported less than 5.0%.

HIGHEST EDUCATIONAL ATTAINMENT OF PARENTS



THE MODAL STUDENT

Her Profile

- Hispanic or Latinx, female
- Urban public high school
- 3.5-3.9 GPA
- First in family to attend college
- First in family to graduate high school
- Household earning less than \$25k
- Did not fill out any inquiry forms
- Only took one college visit
- SAT (860–1000) or ACT (16–18)
- Test-optional policies important
- Split on large or small campus
- Wants an urban setting
- College must have intended major
- 4-year college or community college
- Important factors: campus safety, distance from home, and high school teachers
- Least important: athletics
- Primary college counseling from school counselor and older sibling(s)

Her College Search Challenges

- Not being able to visit campus
- Standardized tests
- Cost to apply
- Did not apply due to published cost

Rather than talk about the average student we prefer to look at the modal student. The modal student is the student that you're most likely to run into on campus, not an amalgamation of averages that might not exist often. We looked at a selection of demographic fields to identify the most common combination of gender identity, race or ethnicity, parents' education level, the type of high school they attended, and their household income. In this year's survey, the modal student was a Hispanic or Latinx woman who attended an urban public high school. She is the first in her family to attend college, and in fact, is the first to graduate from high school. She comes from a household earning less than \$25,000 per year.

This is a shift from 2019 when the modal student was still female, but Caucasian and attending a public high school in the suburbs. Her parents were college graduates and earned between \$75,000 and \$149,000. In fact, that had been the modal student in the 2018, 2017, and 2016 surveys as well.

The 2020 modal student did not fill out any inquiry forms and only took one college visit, but applied to eight colleges and was accepted to five. That's unsurprising given her 3.5–3.9 GPA. Her test scores were in the second quintile, SAT (860–1000) or ACT (16–18), and she found test-optional policies important when she was deciding where to enroll. Her college counseling primarily came from her school counselor and her older sibling(s) played a bigger role in providing counseling than her parents.

She was split on whether she wanted a large or small campus but definitely wanted it to be in an urban setting. Beyond that, making sure that the college had her intended major mattered. Important decision factors were the major at the college, the safety of the college, distance from home, and her high school teachers. The least important factor for her was athletic opportunities. She primarily considered public 4-year colleges or a community college.

Her biggest burdens were not being able to visit colleges, standardized tests, and the cost to apply. Along with her financial concerns, she ruled out colleges and chose not to apply based upon the published cost alone. She is satisfied with the financial aid package she received from the college at which she is enrolling. She is most confident that her college will prepare her for success and that she will graduate on time, but is least confident that she will be able to afford the college she is enrolling at and that she is socially prepared for college. She will be working part-time to help finance her college education and as of July had not yet decided if she was taking out a loan.

SURVEY RESULTS

In 2019 one out of every ten of the lowest income students didn't take a visit prior to enrolling. In 2020 that increased to more than one in five.

Inquiries, Visits, Applications, and Acceptances

Students were still casting a wide net, even if they were visiting fewer campuses this year. The median number of inquiry forms filled out was three, and more than a third of students reported filling out five or more inquiry forms on college sites. Students have been progressively visiting fewer campuses since 2016, but the share of students not visiting doubled this year. With the majority of students rating a campus visit as important, and many colleges using it as an important indicator of enrollment and retention, this trend challenges the enrollment process.

In 2019 one out of every ten of the lowest income students didn't take a visit prior to enrolling. In 2020 that increased to more than one in five. Less than 20.0% of the lowest four quintiles visited five or more colleges, but nearly half of students from households earning more than \$130,000 reportedly did. Last year there was also no difference between students attending public and private high schools, but this year public high school students were twice as likely to not visit any campuses. In fact, private high school students visited more colleges this year than in 2019.

Race or ethnicity made very little difference in a student's likelihood to take multiple visits, though African American or Black students were the most likely to visit five or more campuses, followed closely by Caucasian or White students. The least likely students to visit any campus were Hawaiian or Pacific Islander or Middle Eastern or North African.

There was no significant change in the number of colleges being applied to either; the median remained at five with 51.0% of students filling out five or more. The very slight trend of increasing numbers of students only applying to one college continued. As we have seen in the past, students attending rural high school applied to fewer colleges, with more than 20.0% only applying to one. In contrast, 13.6% of suburban high school students and 12.6% of urban high school students only applied to one college. Homeschooled and online high school students were by far the most likely to only apply to one college with 41.2% and 38.2% respectively. American Indian or Alaska Native students and Caucasian students were the most likely to only apply to one college while Bangladeshi and Korean students were the least likely to.

PERCENTAGE OF RESPONDENTS FALLING INTO EACH CATEGORY BY SURVEY YEAR:

| Inquiry Forms Filled Out | 2020 |
|--------------------------|------|
| 0 | 16% |
| 1 | 14 |
| 2 | 11 |
| 3 | 12 |
| 4 | 9 |
| 5+ | 38 |



| Visits | 2020 | 2019 | 2018 | 2017 | 2016 |
|--------|------|------|------|------|------|
| 0 | 15% | 7% | 6% | 5% | 5% |
| 1 | 18 | 15 | 15 | 14 | 15 |
| 2 | 20 | 20 | 20 | 19 | 19 |
| 3 | 16 | 19 | 20 | 20 | 18 |
| 4 | 9 | 11 | 12 | 12 | 12 |
| 5+ | 22 | 27 | 27 | 30 | 32 |

| Applications | 2020 | 2019 | 2018 | 2017 | 2016 |
|--------------|------|------|------|------|------|
| 1 | 15% | 14% | 14% | 14% | 12% |
| 2 | 12 | 12 | 13 | 12 | 12 |
| 3 | 12 | 12 | 13 | 13 | 12 |
| 4 | 10 | 11 | 12 | 11 | 11 |
| 5+ | 51 | 52 | 48 | 50 | 53 |

| Acceptances | 2020 | 2019 | 2018 | 2017 | 2016 |
|-------------|------|------|------|------|------|
| 0 | <1% | <1% | 1% | 1% | <1% |
| 1 | 20 | 19 | 21 | 19 | 17 |
| 2 | 16 | 16 | 18 | 18 | 17 |
| 3 | 15 | 15 | 16 | 16 | 17 |
| 4 | 12 | 12 | 12 | 13 | 12 |
| 5+ | 37 | 36 | 31 | 32 | 35 |

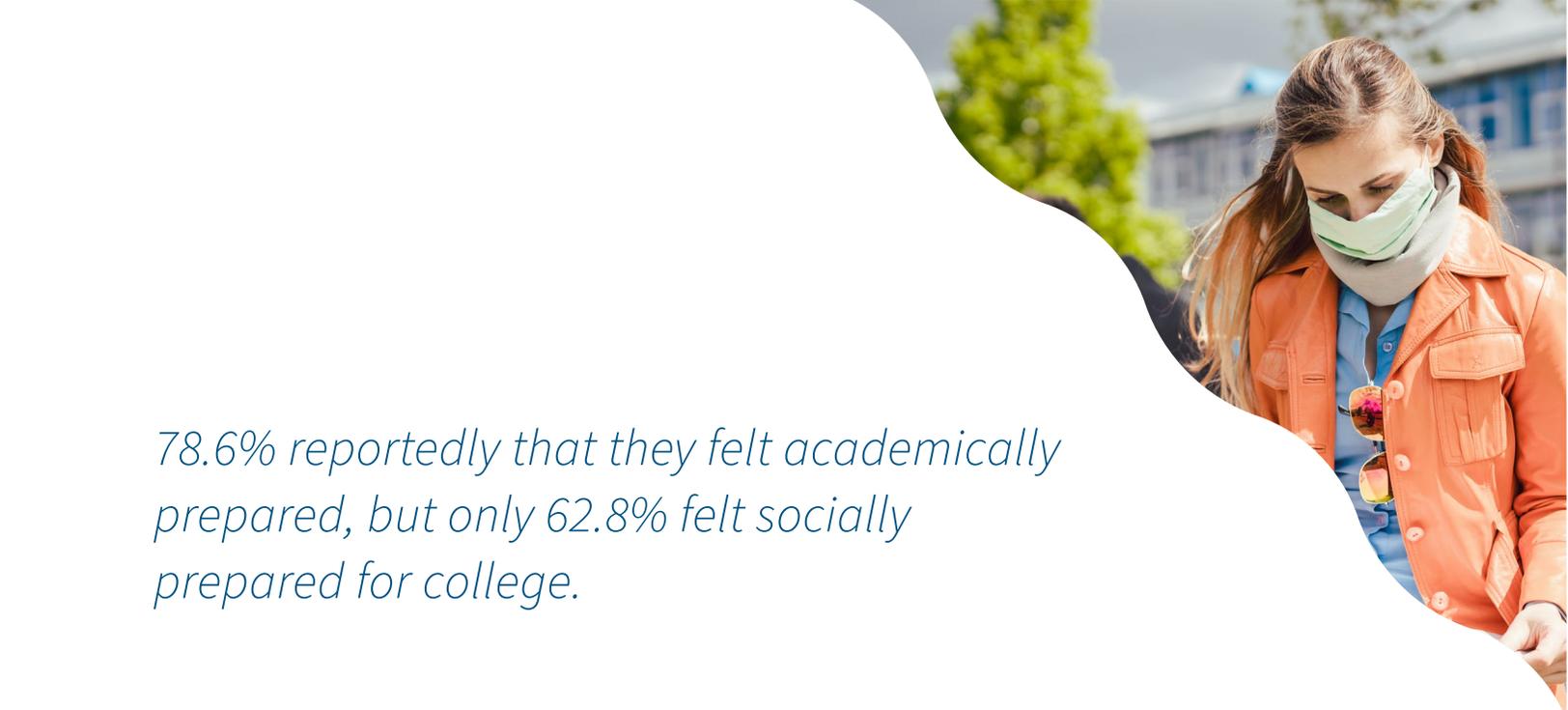


Student Confidence

As should be expected, student confidence has degraded during the pandemic. The two big stories, when looking at the full five years of data, are the continued decline of confidence in preparation for college and the ability to afford the college at which the student has chosen to enroll. Just four years ago nearly half of students agreed that they could afford the college at which they were enrolling, but this year it is less than one-third. Their confidence in their ability to pay for the college they are enrolling at was a concern in 2019 with only 16.6% strongly agreeing, but in this year's responses, we saw that drop to 7.8%. Nearly as many students strongly disagreed as those who strongly agreed—which should be of significant concern to colleges hoping to retain their hard-fought enrollments. Low-income students were quite a bit less likely to be confident that they could afford their choice, 26.9% vs 35.4% for all students. Even low-income students with GPAs at or above a 4.0 were deeply concerned; only 33.7% reported confidence. Students are very worried about being able to afford their college experiences, rather than maximizing their college experiences.

Student confidence in their ability to graduate on time and get a job after graduation both peaked in 2017 and have only slightly decreased. This is unexpected good news given the pandemic and the number of students who saw their parents lose jobs. In normal times slight losses would certainly not be considered a bright spot, however these are not normal times. Ground held is ground won in 2020. The continued bright spots are in their confidence that college will prepare them for success (91.2% vs 90.5% in 2019) and their ability to get a job after graduation (86.0% vs 84.4% in 2019). Student entrepreneurship could see a boost given their confidence going into college at a time like this.

Just four years ago nearly half of students agreed that they could afford college at which they were enrolling, but this year it is less than one-third.



78.6% reportedly that they felt academically prepared, but only 62.8% felt socially prepared for college.

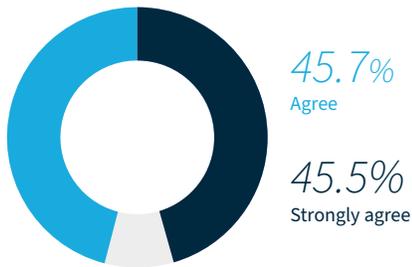
In the 2016-2019 surveys we asked students if they were confident that they were prepared for the college at which they were enrolling. In 2019, 79.8% told us that they were. In 2020 we split that question in two—asking if they felt academically prepared and if they felt socially prepared. This year 78.6% reported that they felt academically prepared, but only 62.8% felt socially prepared for college. There have been strides forward with programs to help students with their academic success, but there have been recent cuts at many institutions to counseling and support services. Based upon what students are saying, that could be the bigger risk to retention.

For example, only 54.4% of gender nonbinary students reported feeling socially prepared, and students enrolling at 4-year public colleges feel less prepared than their peers at 4-year private institutions. Only 86.5% of students with a 4.0 GPA or higher reportedly feeling academically prepared, which should highlight that perception of preparedness is not always tied to reality. All students need support in this transition, and academic support service should be destigmatized and made clearly accessible to all students.

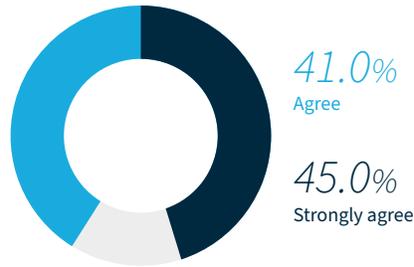


STUDENT CONFIDENCE LEVELS

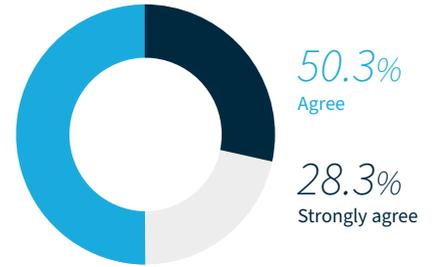
College will prepare me for success



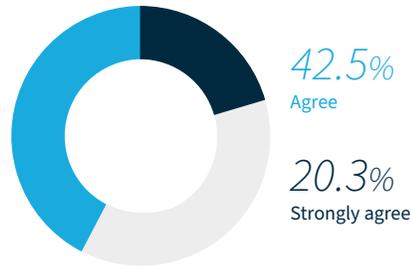
I will get a job after graduating



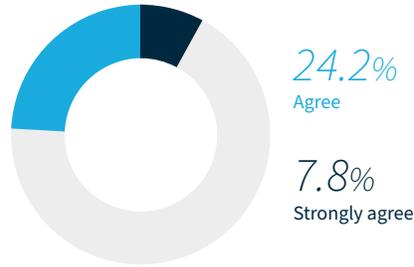
I am academically prepared for college



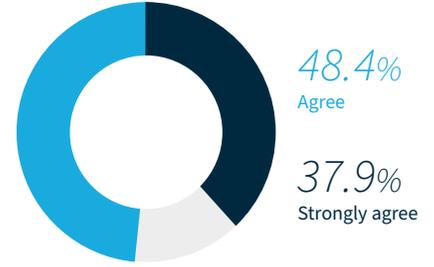
I am socially prepared for college



I am able to afford the college I've chosen



I will graduate on time



| | 2020 | 2019 | 2018 | 2017 | 2016 |
|---|-------|-------|-------|-------|-------|
| The college I've chosen will prepare me for success | 91.2% | 90.5% | 89.8% | 90.9% | 90.0% |
| I will get a job after graduating | 86.0 | 84.4 | 85.3 | 86.6 | 83.0 |
| I will graduate on time | 86.3 | 87.3 | 87.4 | 87.6 | 86.6 |
| I will be able to afford the college I've chosen | 32.0 | 37.5 | 40.1 | 41.2 | 48.5 |
| I am prepared for college | | 79.8 | 80.8 | 82.4 | 81.5 |
| I am academically prepared | 78.6 | | | | |
| I am socially prepared | 62.8 | | | | |

What Were the Challenges Faced by Students?

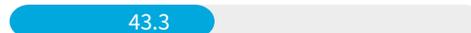
The most common issues that students faced this year were not being able to visit as many campuses as they felt they needed to and the cost to apply. A close third was a new question: standardized testing. All three of these boil down to financial strain for students and families. There were some significant changes from 2019 not just in the order, but also in the impact of these challenges. With an increasing number of students, especially rural students, reporting that they did not have a counselor who was able to help them with their college search, one recommendation would be to continue advocating for more school counselors.

Two questions resulted in very positive responses. Only 4.2% of students reported that their family was not supportive of them attending college. This increased to 7.5% of students from low-income families and 7.1% for first-generation students. There is a harmful stereotype that first-generation students' parents are not supportive of them pursuing an education, and this data disputes that strongly. The second positive is that only 7.5% of students responded that materials and outreach from colleges were not helpful. Some of the responses were aspects that admission offices have a great deal of control over.

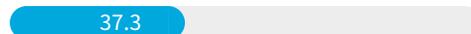
I wasn't able to visit any/many colleges



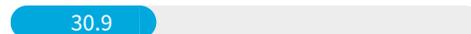
The cost of applying (application fees) was a burden



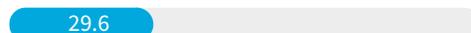
Standardized testing (ACT/SAT) was a burden



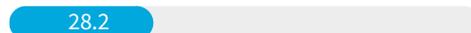
Managing different application requirements and deadlines was a challenge for me



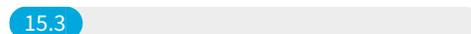
I found it challenging to organize my list and compare colleges



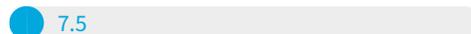
Application deadlines were earlier than I felt prepared for



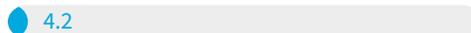
I didn't have a college counselor at my school or they were unable to help me



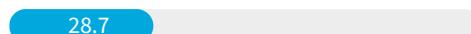
I didn't find the materials and outreach from colleges helpful



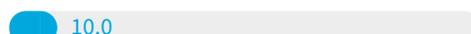
My family is not supportive of me attending college



I faced other challenges not listed here



I had no issues



Support and Counseling in Their College Search

In the 2019 survey, 11.0% of students reported that they either did not have a college counselor at their school or that they were unable to answer their questions. That ticked up slightly to 14.3% this year. We again see rural students receiving less support than their urban and suburban peers; however, it was students attending online schools and homeschooled students who received the least support from their school. Less than half of each reported that their school had a counselor to support their search.

Boarding school students were the most likely to report that they had a dedicated college counselor, followed by those

at private schools. Urban high school students were almost twice as likely to have a dedicated college counselor than their rural counterparts.

Students need support throughout their college search, so it's important to reiterate to recruiters that while they are of course there to drive enrollments, they're also a source of support and an expert for students and families. These results should also be a call for more advocacy to support funding for counselors in all schools and to help support college counselors when possible to help take pressure off of the already overextended school counselors.

COUNSELING SUPPORT BY HIGH SCHOOL TYPE/LOCATION

| | Boarding | Online | Public | Private | Homeschool |
|--|----------|--------|--------|---------|------------|
| My parents/guardians counseled me | 42.0% | 59.4% | 47.4% | 55.4% | 77.0% |
| An older sibling counseled me | 11.1 | 15.7 | 16.1 | 14.2 | 11.8 |
| My school counselor also supports college search | 29.6 | 26.4 | 47.7 | 44.6 | 10.7 |
| My high school has dedicated college counselors | 46.9 | 11.0 | 25.2 | 36.8 | 2.1 |
| Hired an independent college counselor | 1.2 | 1.6 | 2.1 | 3.0 | 2.1 |
| Blogs or forums | 12.3 | 19.2 | 13.2 | 13.8 | 20.9 |
| No counseling support | 12.3 | 20.4 | 14.7 | 8.0 | 16.6 |

| | Rural | Suburban | Urban |
|---|-------|----------|-------|
| My parents/guardians counseled me | 52.0% | 52.8% | 40.7% |
| An older sibling counseled me | 15.6 | 16.3 | 15.6 |
| My high school guidance counselor is also our college counselor | 48.1 | 48.0 | 46.7 |
| My high school has dedicated college counselors | 16.6 | 24.7 | 31.7 |
| Hired an independent college counselor | 1.1 | 3.0 | 1.7 |
| Blogs or forums | 10.9 | 15.7 | 11.0 |
| No counseling support | 15.8 | 13.0 | 15.0 |

What Are Students Looking For?

Most students did limit themselves to a few types of colleges, with the majority considering public and private 4-year colleges, 84.4% and 51.1% respectively. About a quarter of students considered a 2-year college; last year almost half of students considered a 2-year college. Most expectations were that there would be an increase in interest this year, however it was cut in half.

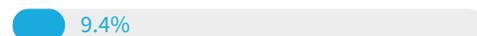
Less than 2.0% of students considered a for-profit college. What is of interest is that only 35.0% of students who are enrolling at a for-profit college initially considered one. By contrast, all other types of colleges are above 86.0% who initially considered that type of college. Also of interest is that only 20.4% of students who attended an online high school initially considered an online college experience.

Student preference in the size and location of their college both dropped significantly this year, perhaps due to COVID-19. There was almost no difference in the location preference with students only slightly preferring an urban center over a suburban or rural location. There was also no difference between a small or large campus. In 2019 almost twice as many students preferred a small campus to a large one. Rural students were much more likely to want smaller campuses in rural areas, suburban students were more likely to want large campuses in urban or suburban areas, and urban students were more likely to want large campuses in urban environments. Interestingly, urban students were more likely to want a campus in a rural area than a suburb. Students with a GPA over a 3.5 were also more likely to prefer large urban campuses and those with a GPA below a 2.5 were much more likely to prefer a small campus with no significant preference on location.

The most important institutional characteristic, and the only one important to the majority of students, was the academic major. The next most important was the ranking of the institution, with only about a third of students considering it important. Rankings are a starting point, but not the sole factor in where students apply. However, the majority of students from households earning over \$130,000 did consider rankings important to where they considered.

TYPE OF INSTITUTIONS CONSIDERED

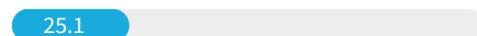
I did not limit my search



Online college



2-year (community or technical college)



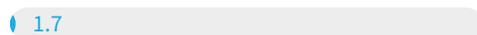
4-year public college



4-year private college

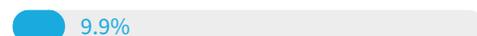


For-profit college

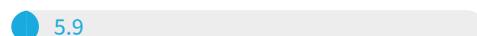


LOCATION OF INSTITUTIONS

Urban center



Suburb



Small town/Rural



About a quarter of students considered a 2-year college; last year almost half of students considered a 2-year college.



What Resources Were Important When Making Their College Decisions

We provided students with an extensive list of resources this year to understand their importance in choosing where to apply and enroll. The most important resources were knowing that the college had their major, the availability of financial aid, and the safety of campus. These are all things which can easily be addressed early in communication flows. The least important were arts, test-optional policies, and athletics. Athletics are the least important factor in decisions, but are generally featured very prominently in marketing and communications. Arts are slightly more important, but receive far less time and attention or recruiting emphasis.

This is a big opportunity to stand out and meet student interests early. One of the most important resources for students are their teachers, so colleges have an opportunity to influence the influencers there as well. Teachers had twice as many students place importance on their input than their school counselors, the people most often considered the influencers by colleges.

When we focus in on non-White students we see test-optional policies, student reviews, and college search platforms becoming more important. College representatives and teachers also get an increase in importance. These point to the students seeing the value in the support and first-hand experience of others. They are also aware of the issues with standardized tests and are more likely to value policies that support more fairness in admission and aid.

Students in the lowest two income quintiles were more likely to value college representatives and school counselors, two relationship based support systems. The net price calculator and financial aid were also more important, highlighting why an easily accessible and accurate net price calculator can be an asset to recruitment rather than a liability, which it is sometimes seen as. These students were also the most likely to find test-optional policies important.

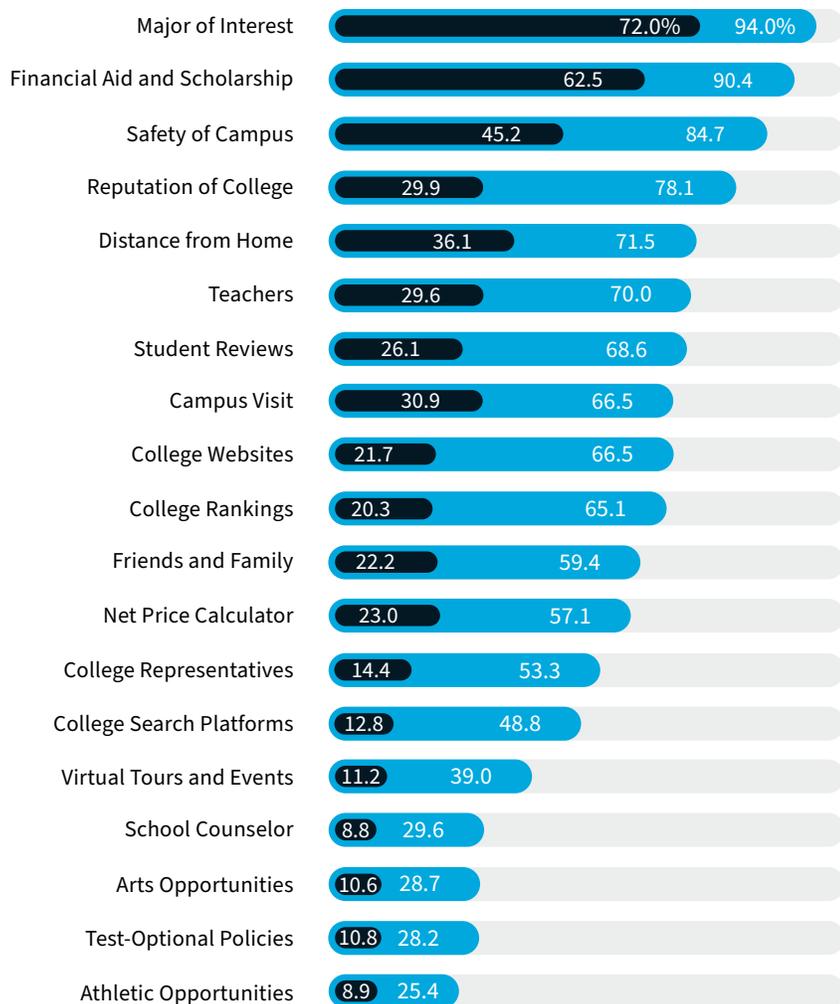
First-generation students also behave differently than their peers. College representatives and school counselors again played a larger role in their decision making. Financial aid is again more important. Test-optional policies are more important to first-generation students than their peers as well. Any college prioritizing the recruitment of these three underrepresented groups should consider test-optional or test-blind policies if they have not already done so.

*When we focus in on **non-White students** we see test-optional policies, student reviews, and college search platforms becoming more important.*



RESOURCES USED WHEN DECIDING WHERE TO APPLY

● Very Important ● Overall Importance



The most important resources were knowing that the college had their major, the financial aid, and the safety of campus. These are all things that can easily be addressed early in communication flows.

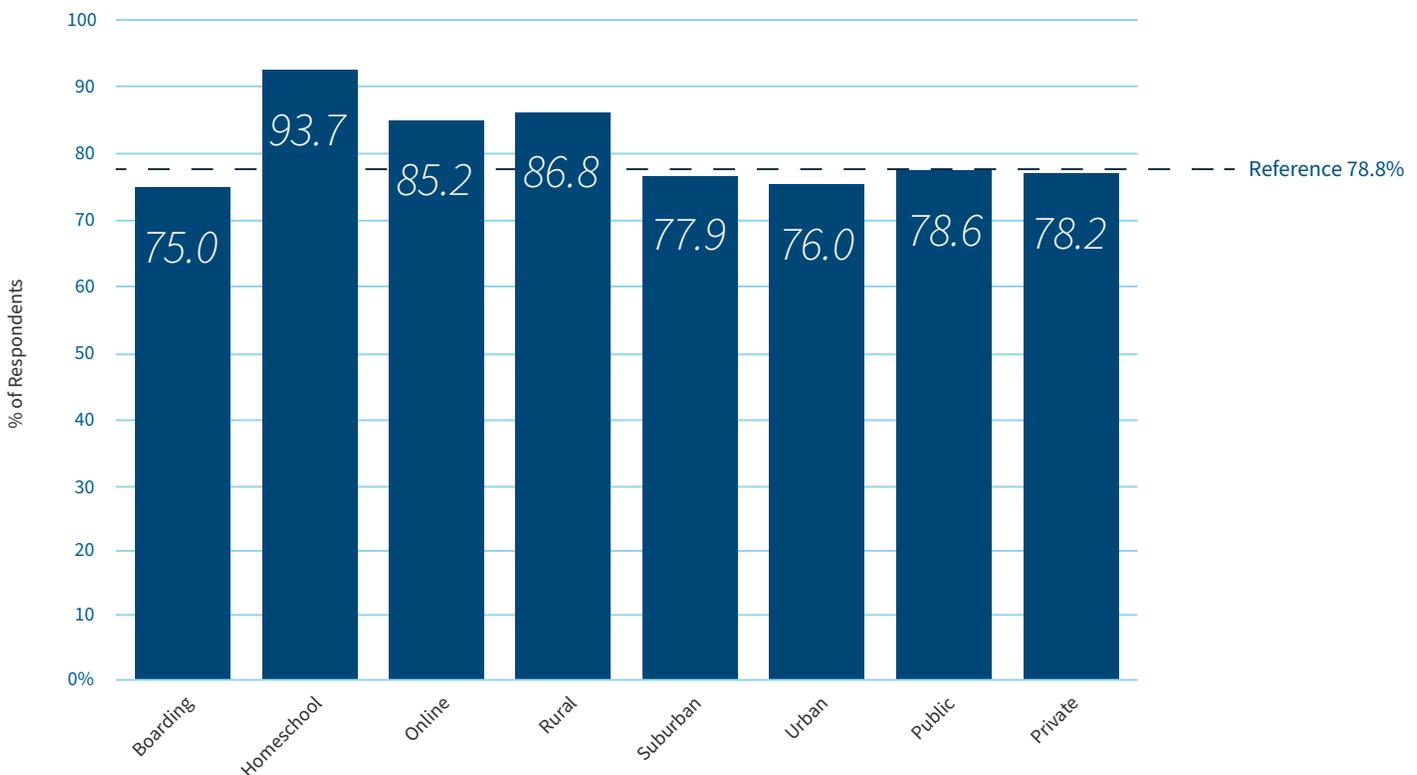
There was no significant difference between public and private high schools with only slightly higher responses from public high school students.

First-choice Acceptances

This year 78.8% of students reported that they were accepted to their first-choice college. This was highest among homeschooled students and those attending rural high schools and lowest at boarding schools and urban high schools. There was no significant difference between public and private high schools with only slightly higher responses from public high school students. These very closely mirror the results of last year's survey, with slightly more students reporting acceptance to their first choice this year.

These results should be widely shared with students, as there is often anxiety surrounding college acceptances. We again see that it is unwarranted though as the students will most likely be accepted to their first choice. Whether or not it will be affordable and the right choice in the end is a separate question and concern, but unrelated to whether or not they will be accepted.

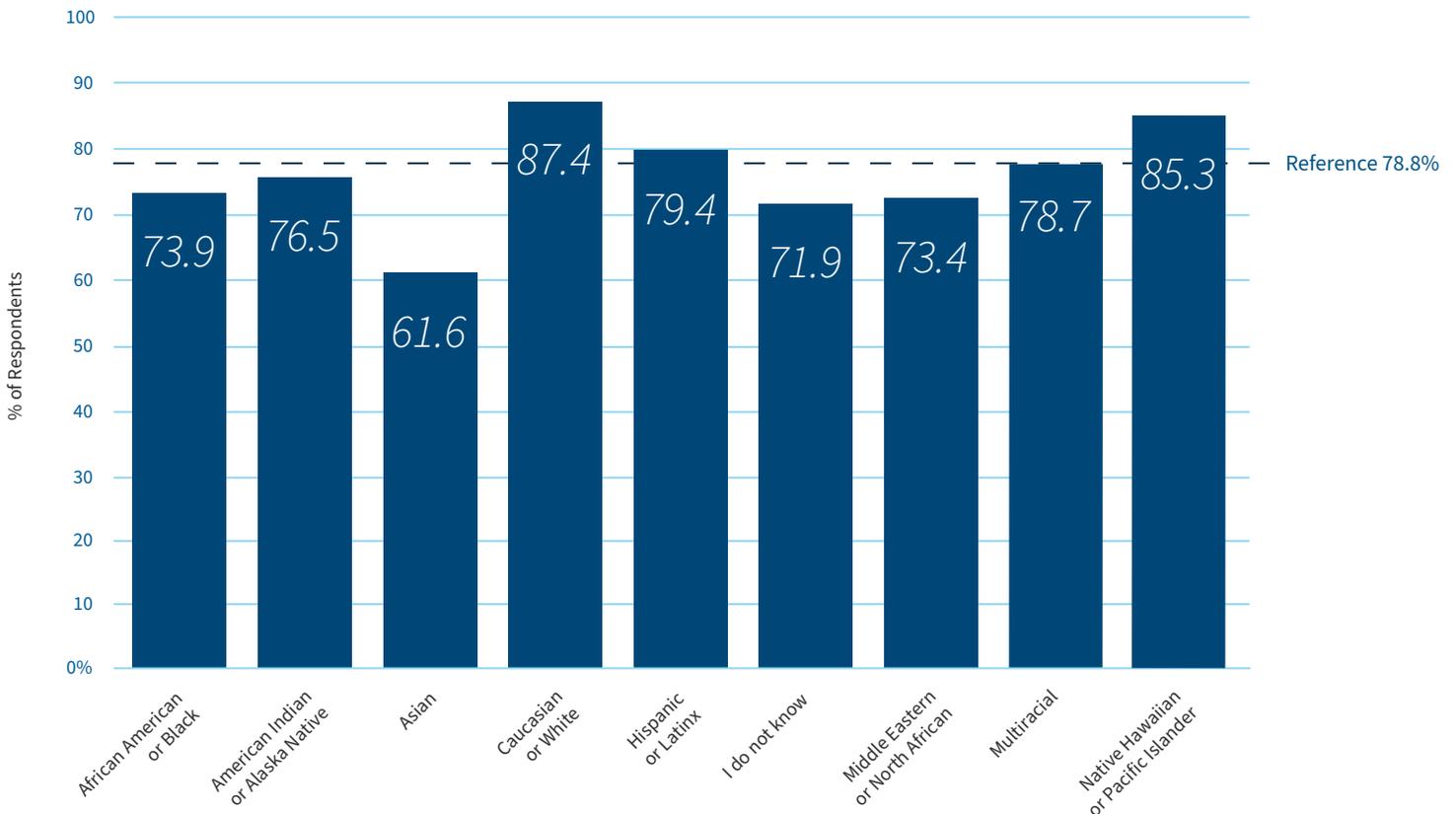
FIRST-CHOICE ACCEPTANCE BY HIGH SCHOOL TYPE/LOCATION





The first-choice acceptance rate by race or ethnicity says more about cultural influence on choices than the applicants themselves. Bangladeshi (53.2%), Chinese (51.3%), and Indonesian (53.3%) students were the least likely to report being accepted to their first choice while White (87.4%), Hmong (82.5%), and Native Hawaiian (94.0%) students were the most likely to report being accepted to their first-choice college.

FIRST-CHOICE ACCEPTANCE BY RACE OR ETHNICITY



Student Satisfaction

Students were more satisfied with traditional visits than virtual visits and events, but were not dissatisfied by a wide margin. Students were over twice as likely to say they were very satisfied with a campus visit over a virtual visit or event, but were actually 0.1% more likely to report they were very dissatisfied as well. This bodes well for colleges; with similar floors there is opportunity to tailor virtual events to the platform and environment rather than trying to convert existing events to online. Virtual events can be spread across multiple platforms; the experiences then can be tailored to play to the strength and user expectations of each platform. A virtual event or panel on Instagram can play very differently than a livestream with Q&A on YouTube or a Zoom room. Landing pages can serve as a portal to a whole campus open day with easy access to information and a combination of live and recorded events.

Chatbots were a new question this year, and already only about a quarter of students said that it was not applicable to them. Of those who did respond, students were largely neutral but about three times as likely to be positive than negative. When done well, and site-wide, they can be a useful tool to engage students and triage questions.

Another new question this year was about their satisfaction with the recruiting process overall.

Students were overwhelmingly positive: 69.9% were satisfied against only 5.3% dissatisfied. Cambodian, Chinese, and Middle Eastern or North African students were the least satisfied with the recruitment process with 55.5%, 55.3%, and 61.6% respectively reporting positive satisfaction. Students in the lowest household income quintile were slightly more satisfied than those in the highest quintile, but with less of a range than that seen by race or ethnicity.

Student satisfaction with their financial aid was still low with only 48.0% of students reporting that they were satisfied. The good news is that it increased from last year's 43.2%. This may indicate higher discount rates or other strategies to increase aid this year. As we saw last year, the higher the income quintile a student came from, the less satisfied they were with their financial aid. Students who were enrolling at private 4-year colleges were more satisfied than their peers at public institutions (59.1% vs 42.6%) and in fact were the most satisfied. Students enrolling at a 2-year institution were the least satisfied (41.7%) and for-profit students just edged out public 4-year students with 45.0% of students expressing satisfaction.

STUDENTS REPORTING SATISFACTION BY YEAR

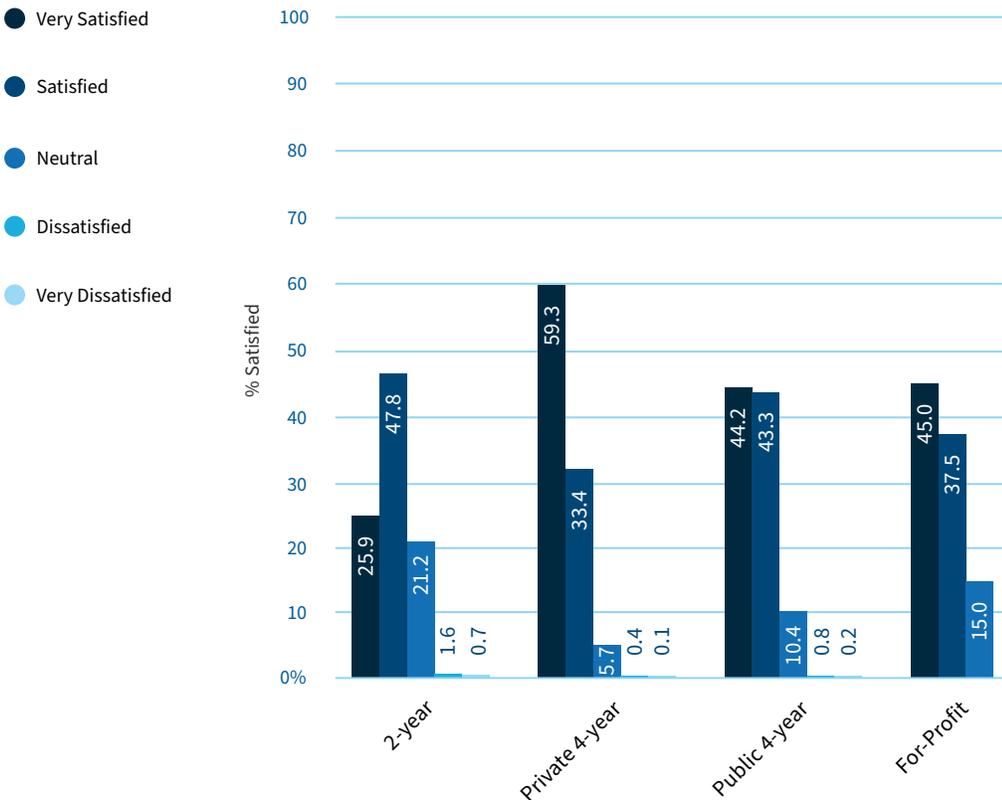
| | 2020 | 2019 | 2018 | 2017 | 2016 |
|------------------------|-------|-------|-------|-------|-------|
| Financial aid package | 48.0% | 43.2% | 44.6% | 46.0% | 49.7% |
| College(s) accepted to | 85.0 | 83.0 | 82.5 | 84.6 | 83.9 |
| College enrolling at | 86.7 | 87.5 | 86.3 | 87.6 | 87.2 |



Unsurprisingly, most students were still very satisfied with the colleges they were admitted to and the college they chose to enroll at. Private 4-year colleges earned the highest satisfaction, followed by public 4-year colleges, for-profit colleges, and then 2-year institutions.

The satisfaction increased as household income increased as well, ranging from 83.0% for students from households earning less than \$25,000 to 93.1% for students from households earning more than \$130,000 per year.

SATISFIED WITH ENROLLING INSTITUTION



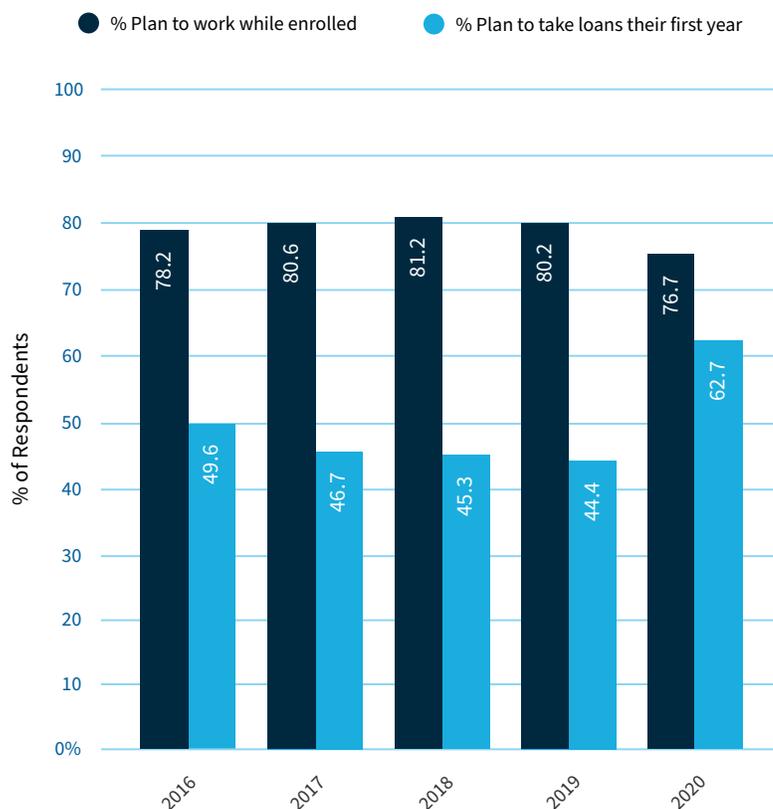
Financing Their Education

College costs continue to grab headlines and provide stress for students and families. This year 68.1% of students reported removing colleges from consideration based solely on the published cost. This is up significantly from 56.2% last year. Discounting has not been working as well recently as a leveraging tool, and now more than two-thirds of students are ruling out colleges before they ever see a financial aid package. This was highest among Native Hawaiian or Pacific Islander students at 77.8% and Hispanic or Latinx students at 73.4%. The majority of every income quintile ruled out colleges, ranging from 54.3% for households earning over \$130,000 to 70.5% for those earning less than \$25,000. Even a majority (66.0%) of students whose parents have a college degree were ruling out colleges based on their published cost, so prior experience made almost no difference.

This year 68.1% of students reported removing colleges from consideration based solely on the published cost.

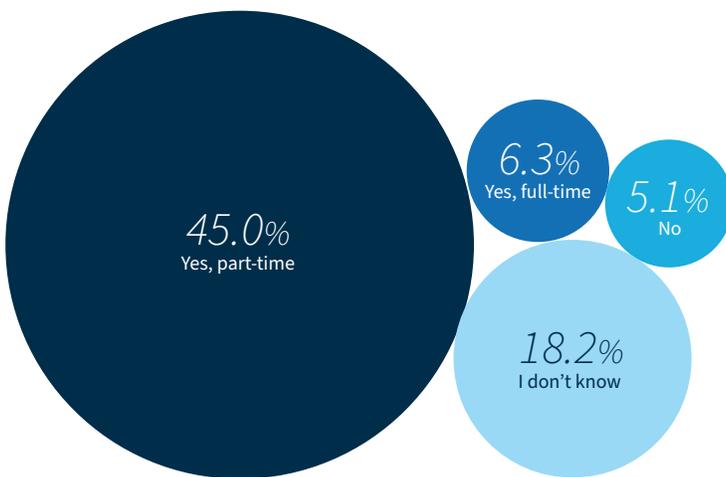
The majority of students plan to work while attending college; only 5.1% of students responded that they do not plan to work while enrolled. This year 6.3% of students plan to work full-time, however that number increases to 9.9% for those from households earning less than \$25,000 and 10.7% for those enrolling at a 2-year college this fall. This year produced the smallest share of students planning to work while enrolled, likely due to the pandemic and concerns over opportunities, while also significantly increasing the percentage of students who plan to take a loan their first year. For the first time in five years of surveying, the majority of students plan to take on a loan, reversing a trend of declining percentages.

WORKING AND LOANS

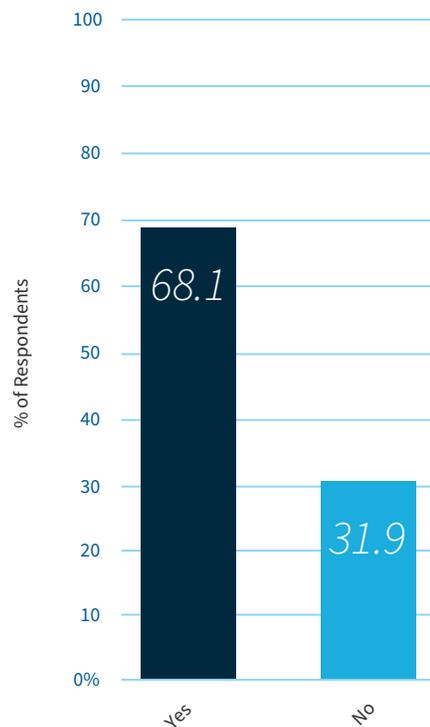


Students enrolling at a 4-year private college were the most likely to receive financial aid, almost 50.0% more likely than their 4-year public college peers. Aid dropped as reported GPA dropped, ranging from 71.7% for those reporting over a 4.0 to only 12.5% for those reporting less than a 2.0. Students need to be made aware of opportunities to receive internal and community aid. Low-income students were the least likely to apply for outside scholarships. That additional aid would not increase discounting for a college and would make the institution more affordable for the student.

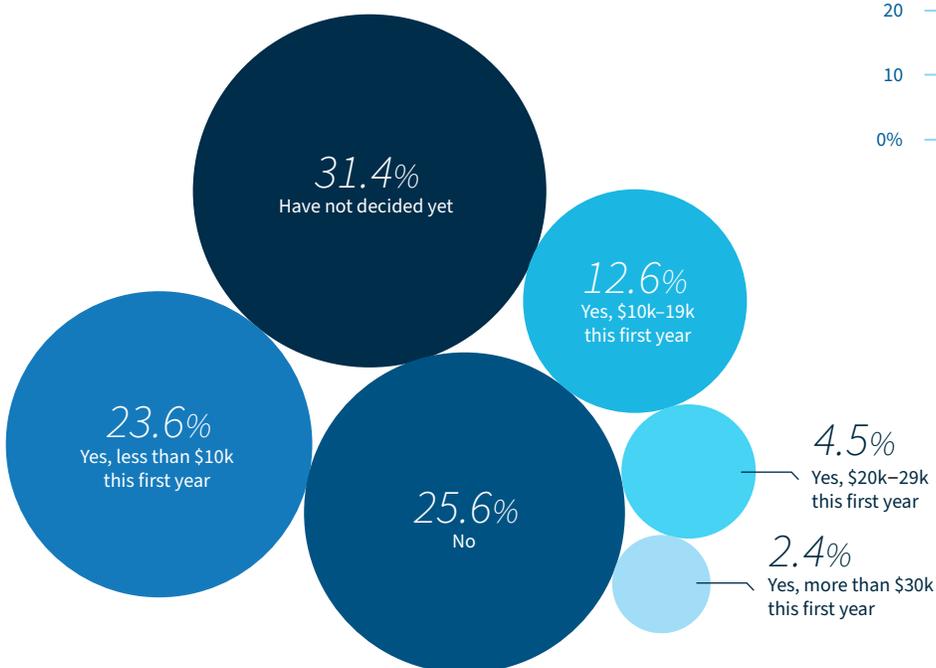
STUDENT EMPLOYMENT WHILE LEARNING



DID YOU RULE OUT COLLEGES BASED ON PUBLISHED COST BEFORE AID?



FIRST YEAR STUDENT LOANS



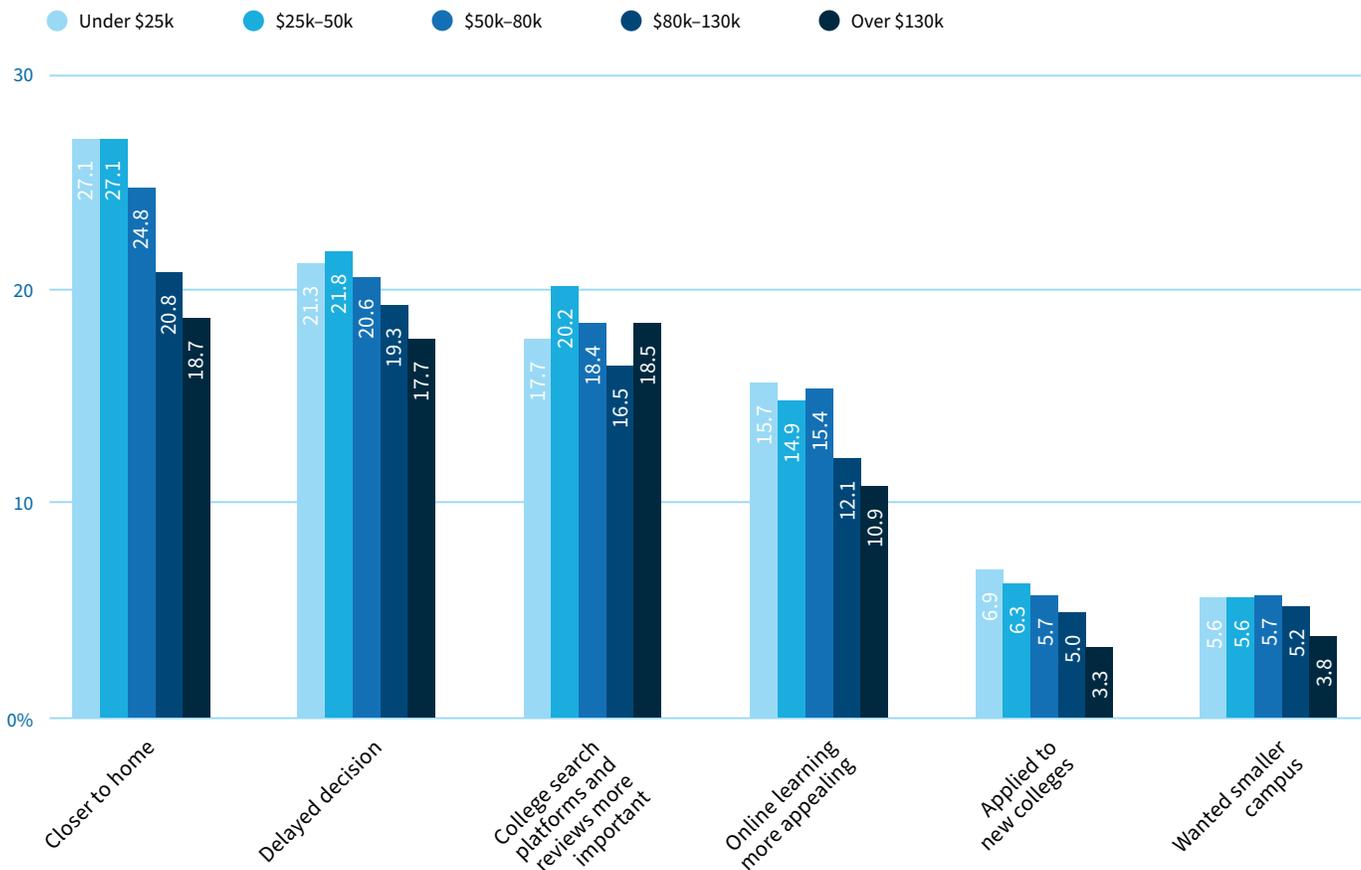
Effect of COVID-19

Students most reporting a disruption were American Indian or Alaska Native while Caucasian students were the least likely to report it affecting their decision.

When we surveyed students and parents in March through June we heard a lot about uncertainty. Students were reconsidering their options, uncertain if they would take time off, and uneasy about large campuses and cities. Of the 36,000 seniors we surveyed in the spring, 44.0% were reconsidering their college options. At that time, about 38.0% also said that they were considering enrolling closer to home than they had planned to. COVID-19 will not just be affecting this class; students in 2021 may also be enrolling closer to home and will certainly be paying a social and emotional toll that could further risk confidence in their preparation for college.

Ultimately, COVID-19 only affected the decision of half of the students, far less than originally considering. The biggest changes were in a desire to stay closer to home and delaying their decision. Students most reporting a disruption were American Indian or Alaska Native while Caucasian students were the least likely to report it affecting their decision. The lowest income students were the most affected in their decision. They were 50.0% more likely to want to enroll closer to home and were more likely to apply to new colleges late this spring.

EFFECT OF COVID-19 ON COLLEGE SEARCH BY HOUSEHOLD INCOME





Social Media and App Usage

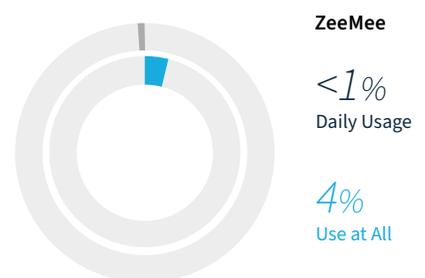
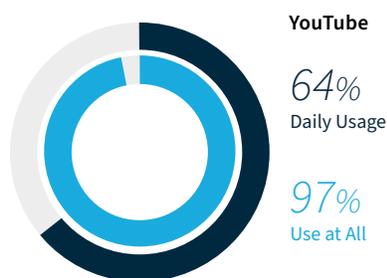
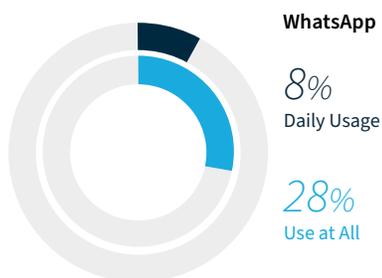
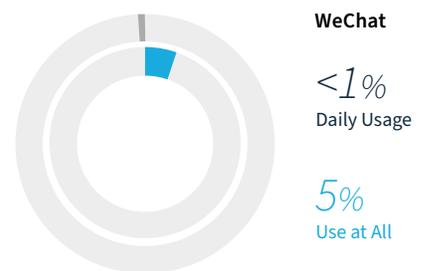
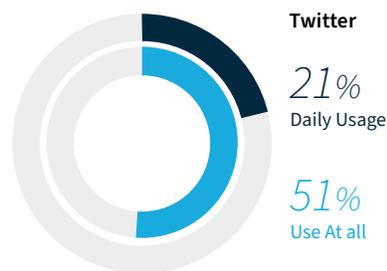
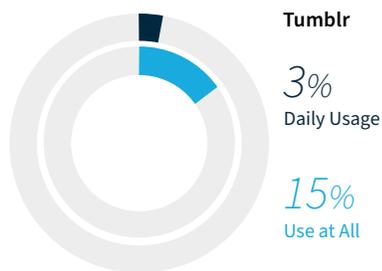
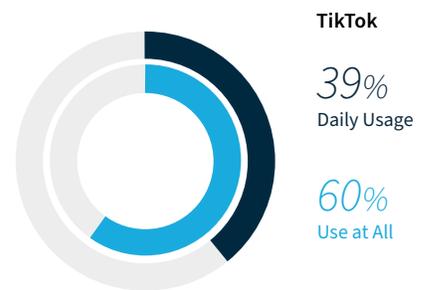
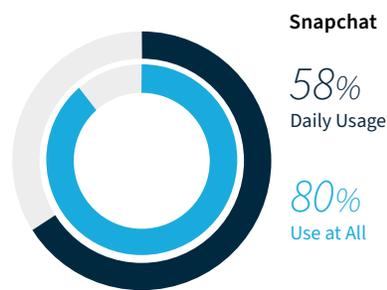
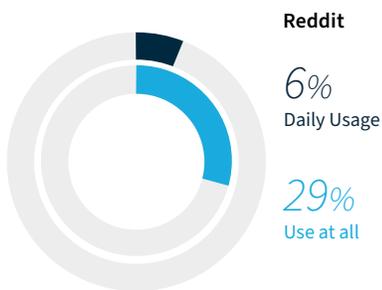
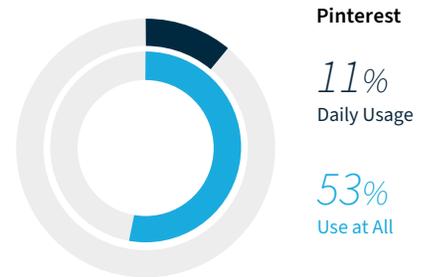
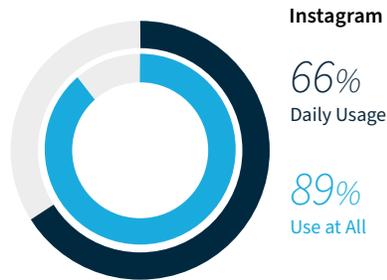
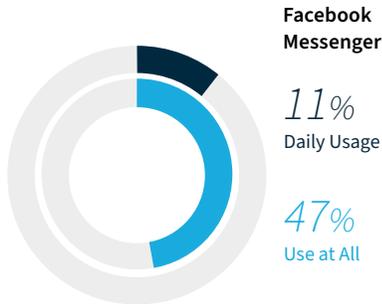
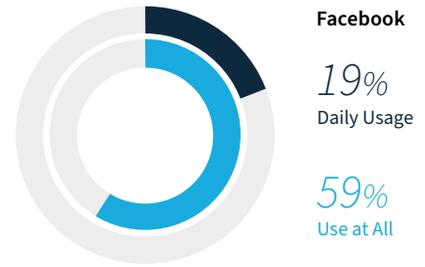
Social media and app usage trends change quickly. The top networks this year were all visual platforms. Students crave photos and videos, not deadline graphics and photos of posters. Work with students to cultivate an ambassador program of students who can create content. Make sure that they are diverse voices who can help connect with core audiences in ways that university staff cannot. Snapchat was surging until their redesign in 2018 caused many users to switch over to Instagram and not look back. Facebook usage among students has declined steadily since their parents and grandparents have taken to the site. TikTok is the current hot trend, but its US future is in question at the moment. Twitter’s decline has been less dramatic and this year saw an inflection point in which there were more seniors using Twitter daily than Facebook for the first time. Instagram also saw its first decline, likely as students begin to move to TikTok or other apps when their parents migrate to the platform. Instagram, YouTube, and Snapchat still have a commanding lead with the majority of students reporting that they use the platforms daily.

This year saw an inflection point in which there were more seniors using Twitter daily than Facebook for the first time. Instagram also saw its first decline.

DAILY SOCIAL MEDIA USAGE OVER TIME

| Platform | 2020 | 2019 | 2018 | 2017 | 2016 |
|-----------|-------|-------|-------|-------|-------|
| Facebook | 19.0% | 27.2% | 33.9% | 44.1% | 54.1% |
| Instagram | 65.6 | 70.7 | 63.3 | 59.7 | 57.9 |
| Snapchat | 57.6 | 69.7 | 72.1 | 69.9 | 66.9 |
| TikTok | 39.2 | | | | |
| Twitter | 21.0 | 26.3 | 28.2 | 31.1 | 32.7 |
| YouTube | 64.2 | | | | |

This year we increased our scope to include more messaging apps and networks. YouTube, Instagram, and Snapchat had the highest usage while message apps WeChat and ZeeMee saw relatively little usage. It's interesting to note that Facebook Messenger gets the most usage in rural areas while WhatsApp sees most usage in urban and suburban areas. You need to understand who your audience is and focus on the networks they use. Work closely with your social media managers and support their work with dynamic and engaging admission content.





Students Choosing Not to Enroll

Only 1.3% of students surveyed decided not to enroll. Our first COVID-19 survey in March and April showed 9.0% of students considered taking time off or not enrolling, but by May that had dropped to 6%. Surprisingly, household income and parents' education alone did not play a significant role in the decision to delay or forego enrollment. Native students were an outlier with the most students saying that they were not going to pursue education at all now. Given that they were also the most likely to report coming from households earning less than \$25,000, the pandemic runs the risk of further extending the cycle of poverty.

International students were another group that we knew would be greatly affected. They were the most likely to report taking time off rather than enrolling now, but with the majority reporting that they had decided where to enroll (and many colleges reporting large losses), they may be choosing to study in other countries. If the pandemic improves by the spring or fall of 2021, there may be opportunities for more international transfers; otherwise this might be a lost class of international students.

International students were the most likely to report taking time off rather than enrolling now.

STUDENT RECRUITMENT

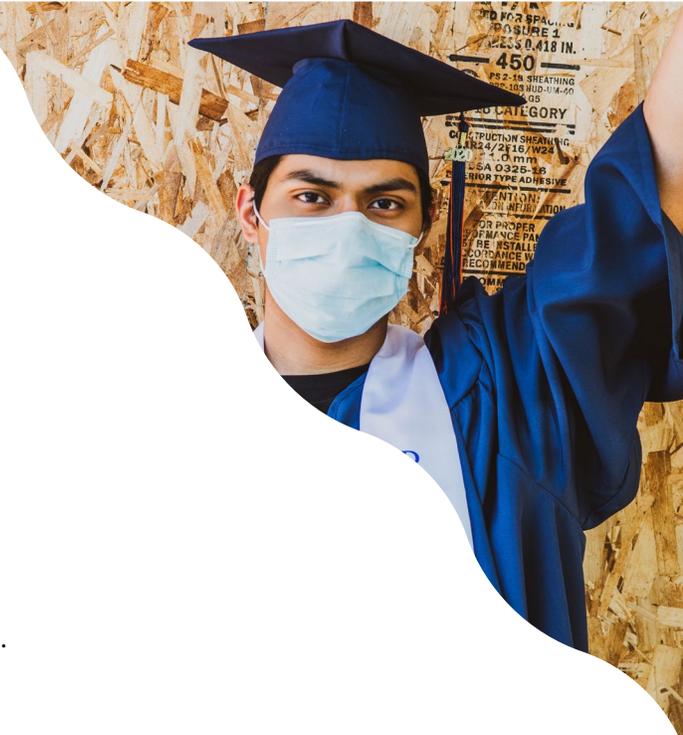
In Their Own Voice

We also asked free response questions about students' recruitment process to suss out the subtle differences and look for context in answers. The first question simply asked which colleges did a great job and what they did that set them apart from others recruiting them. In a very unexpected turn the four most frequent responses as to the colleges doing the best job shared a common trait: they're all in Arizona. According to students, the colleges to beat are Grand Canyon University, Arizona State, University of Northern Arizona, and University of Arizona.

Common themes from students were that recruiters kept in touch with them and provided valuable and useful information. They provided guidance and support outside of just the process to apply and enroll. This student's response shows the importance of relationship building: "Although ultimately I did end up going to a community college, they did keep me up to date with what I needed to turn in and with how I could further skills in the career I was interested in. Which is why I'll be attending there after I graduate!"

It was also common to hear that recruiters kept providing information about majors and careers related to them. They used what they knew to provide personalized and relevant information, something that secret shopping has shown is unfortunately rare. This student speaks to that in their response: "They made sure to email me about their specific programs I was interested in, invited me to virtual seminars by professors in my major, reached out by phone call and mail, invited me to visit at a reduced cost."

Admission staff were also key, which was the most common theme for Grand Canyon University—the most frequent college lauded. Some of the things students said were: "They were very approachable, kind, and upbeat which made me feel comfortable around them.," "They paid attention to what I said and helped me figure out some general majors that I would be interested in. Lastly, they were very accepting and did not judge me when I told them about my personal situation that was affecting my chances of going to college and I really



Students mentioned that emailing weekly was unnecessary, especially multiple times in a day. In fact, 20% went so far as to call email tactics spam.

appreciated that a lot.” “They were respectful of all of my college decisions and are very helpful in helping me get enrolled and making sure I can handle the finances. I got many budget sheets comparing many different situations and it was really helpful to see those.”

The second question asked what advice they would want to give to colleges about the recruitment process. The most common comments were about emails from colleges, with very few being positive. Students mentioned that emailing weekly was unnecessary, especially multiple times in a day. In fact, 20% went so far as to call email tactics spam. “Be a little more in touch with students that are on the verge of applying and not just send them spam emails.”

The next most common comment was about test scores as a poor measure of a student. “Actually care, don’t put us into a statistic or just view us as our test scores. Actually care about future leaders and their education.” After that there were mixed sentiments surrounding financial aid. Some felt that the process was well done while others voiced concerns about difficult or even misleading processes. There were several students who commented on being unable to find a net price calculator or the offer being very different from what they ultimately experienced.

The most positive theme was about colleges continuing to be supportive and feeling like home. “Be super friendly. I got many texts and calls regarding all the information I needed. I felt important to the college.” Another student wanted to tell colleges, “instead of boasting about their achievements they should speak more on how campus life is. College is going to be a second home for many students, they need to know it’s safe, welcoming, and trusting.” One student summed up their advice well: “Always be consistent with the students, show interest in them, learn their strengths and weaknesses, help them with finding the major they would do well in and any other struggles they may have when enrolling into college, and make them feel welcomed and safe at all times.”

The last question was specific to students who said that they were either not enrolling this fall or decided not to attend college at all. More than a third of the students reported that it was because of COVID-19 while only slightly fewer responded that it was because of costs. “Due to the outbreak of the current pandemic, enrolling to university seemed impossible to do at that point.” “My family is struggling to make ends meet with both my parents and sister working. With three dogs and two younger siblings in the house, someone needs to be there to help raise and teach the children while taking care of the dogs.”

“My family is struggling to make ends meet with both my parents and sister working. With three dogs and two younger siblings in the house, someone needs to be there to help raise and teach the children while taking care of the dogs.”



Methodology

This survey was conducted on Niche.com during June and July 2020. Students who stated that they were either not a 2020 high school graduate or had not made an enrollment decision were eliminated, as were any partial responses. Questions were built upon from prior surveys to help provide comparisons.



Our mission is to make researching and enrolling in schools easy, transparent, and free.

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