

Reflections After the Pandemic

2023 Senior Enrollment Survey

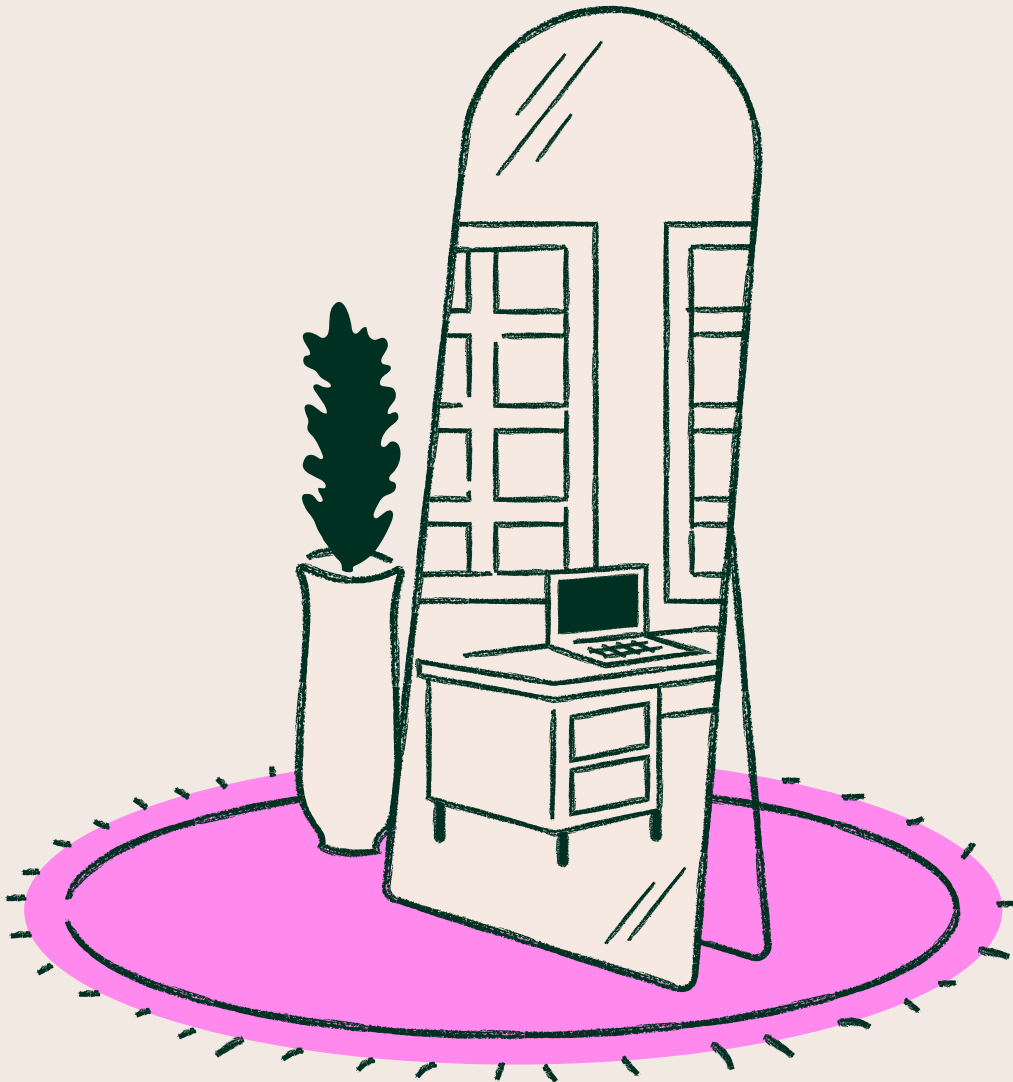


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Reflections on 2023

We're all doing a lot of reflecting after the pandemic.

We're each reflecting on our own lives and work. The higher education industry is reflecting on sustainability and adaptability. But the reflections that were the most prominent have more to do with data trends than personal and institutional reflections. In this eighth year of surveying the enrolling class of students, there were a lot of trends that reflected pre-pandemic behaviors and sentiments.

Changes to the Search Process

The search process has changed dramatically over the past few years, and recruitment strategies should as well. Traditional student search is failing as more and more students appear to be loading at the top, but not flowing through. Students are applying to more colleges than ever and the number of students reporting acceptance at ten or more colleges has gone up by 200%. This drives down yield and ultimately nullifies prediction models, which can affect your budget planning. Even though students report more confidence and don't feel the need to engage with admissions offices directly, early relevant engagement through promotional campaigns focused on building awareness for when it comes time to decide where to apply (mental availability) can help students narrow their list instead of casting such a wide net. Direct admissions programs offer students the ability to focus on the fit first and then accept offers rather than playing a "what if" game with dozens of colleges.




Understanding the Influencers

Influencers are key to the search and decision-making process for students. But who are they and how do you engage with them? In the research phase, influence primarily comes from their family and school counselor, though fewer students reported access to their school counselors. When it comes time to make the enrollment decision, family is their most influential ally. The role of current students at a college, though diminishing from prior years, is also significant in the decision. The role of online reviews continued to climb past the input of their friends and could overtake current students soon.

About the Whitepaper

Themes and results around the search and selection processes, which we broke into three categories, can be used to better tailor outreach and enrollment marketing early. The results highlighting barriers for students should be shared and discussed more broadly on campus to support students during this critical transition better. The decision-making results can influence your yield activities so that they speak to what students need during the time between acceptance and enrollment. With eight years of trend data, these results will allow you to reflect on where we've been and help prepare for where we're heading.



The search
process has
changed
dramatically—
*Strategies need
to as well.*

The Traditional Funnel is Clogged

More college acceptances mean more opportunities for students, but also a lower yield and higher cost to enroll for colleges.

Reaching students **where they naturally are**, and on their preferred communication channels, is more important than ever, especially as we see traditional visit behaviors continue to change.

After years of declines, the number of students filling out inquiry forms on college websites rose sharply this year: 87% reported filling out at least one, and 42% reported five or more.



87% of students reported filling out at least one inquiry form, and 42% reported five or more.

INQUIRY FORMS FILLED OUT

	2020	2021	2022	2023
0	16%	19%	28%	13%
1	14%	12%	12%	10%
2	11%	11%	14%	14%
3	12%	13%	13%	11%
4	9%	8%	8%	9%
5+	38%	37%	25%	42%

20% of respondents said they were accepted to at least one college through a program where they were offered acceptance based on a profile rather than applying.



Students are applying to more colleges than ever before, a bad sign for yield and forecasting. Students applying to 10 or more rose 8% from last year and 56% from before the pandemic.

COLLEGES APPLIED TO

	PRE PANDEMIC	2020	2021	2022	2023
DA* ONLY					0.01%
1	14%	15%	11%	11%	12%
2	12%	12%	10%	10%	10%
3	13%	12%	11%	10%	9%
4	11%	10%	9%	10%	9%
5+	51%	51%	59%	59%	60%
10+	18%	19%	25%	26%	28%

*DA = Direct Admissions

79% of students who had a first-choice college were accepted to it.

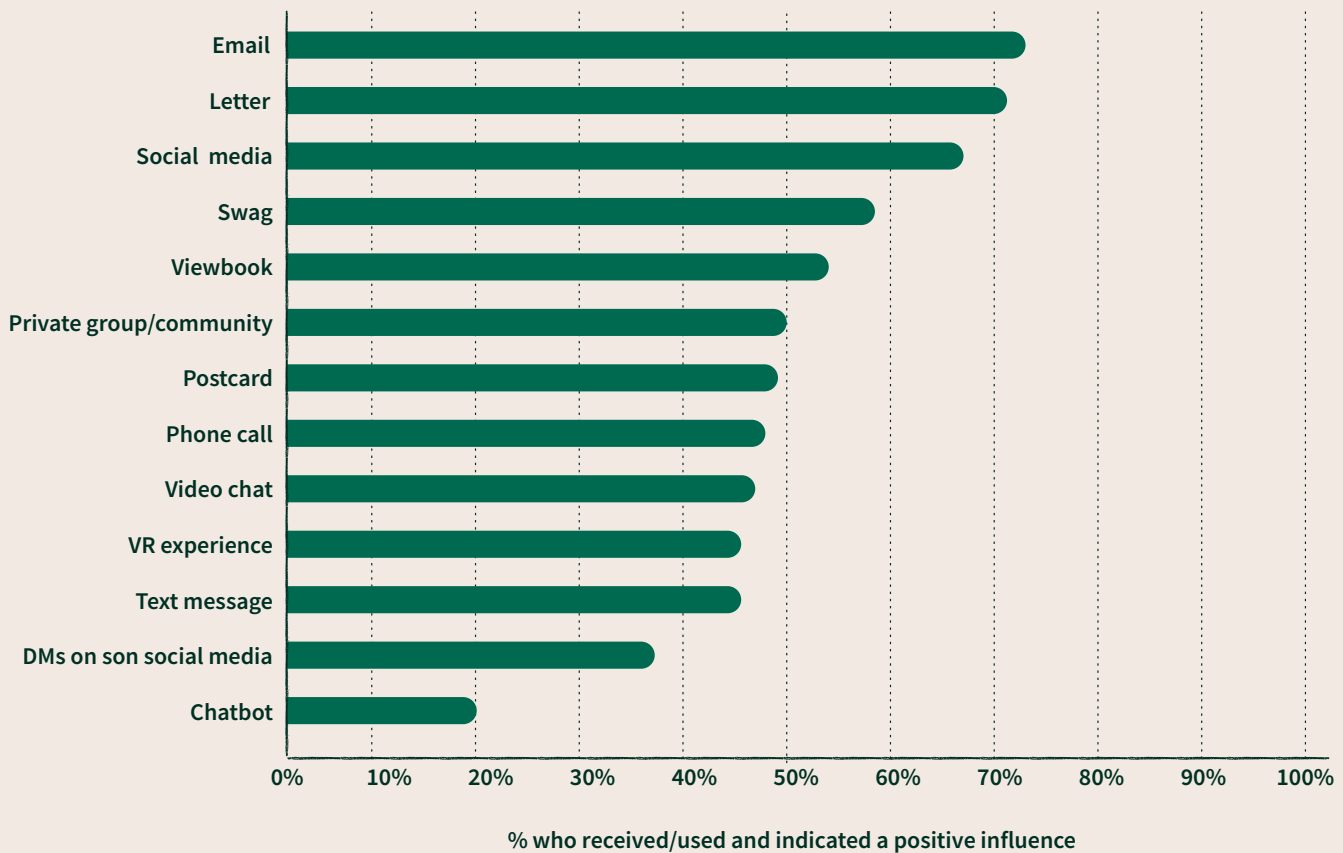
The percentage of students being accepted to 10 or more colleges has doubled since before the pandemic, and almost half of respondents were accepted to five or more.

Students said they were most likely to receive an admissions decision more than 30 days after applying—and 56% said that wasn't quickly enough. They were most pleased when the response time was under two weeks and especially within 48 hours of submitting their materials.

COLLEGE ACCEPTANCES

	PRE PANDEMIC	2020	2021	2022	2023
1	19%	20%	16%	17%	16%
2	17%	16%	14%	14%	14%
3	16%	15%	14%	14%	13%
4	12%	12%	12%	12%	11%
5+	34%	37%	44%	43%	45%
10+	6%	8%	10%	11%	12%

THE INFLUENCE OF MARKETING TACTICS AND CHANNELS



Communication channels and preferences are demanding more relevance from colleges.

✿ If you start enrollment marketing in the spring of a student’s junior year, you’d be reaching almost three-quarters of them at the beginning of their active college search. **Only 17% of students were actively researching before their junior year.** The outliers were students in the highest income quintile—22% of them started earlier.

✿ **Emails were the most likely marketing channel to have a positive influence on a student’s interest in a college.** The majority also responded that letters, social media, swag, and viewbooks did. Only 35% said that a DM on social media had a positive influence and only 19% said that using a chatbot did.

✿ The majority of students said they received postcards, phone calls, and text messages, yet these did not have a positive influence. **Text messages and phone calls were the most likely to have a negative influence on their interest.**

Only about one-third of students reported receiving touchpoints that were relevant to them from colleges.

They can find in-depth information about colleges on Niche and elsewhere—what they need from a college is relevant outreach that speaks to their specific interests, needs, and barriers.



PERSONALIZATION IN COMM FLOWS

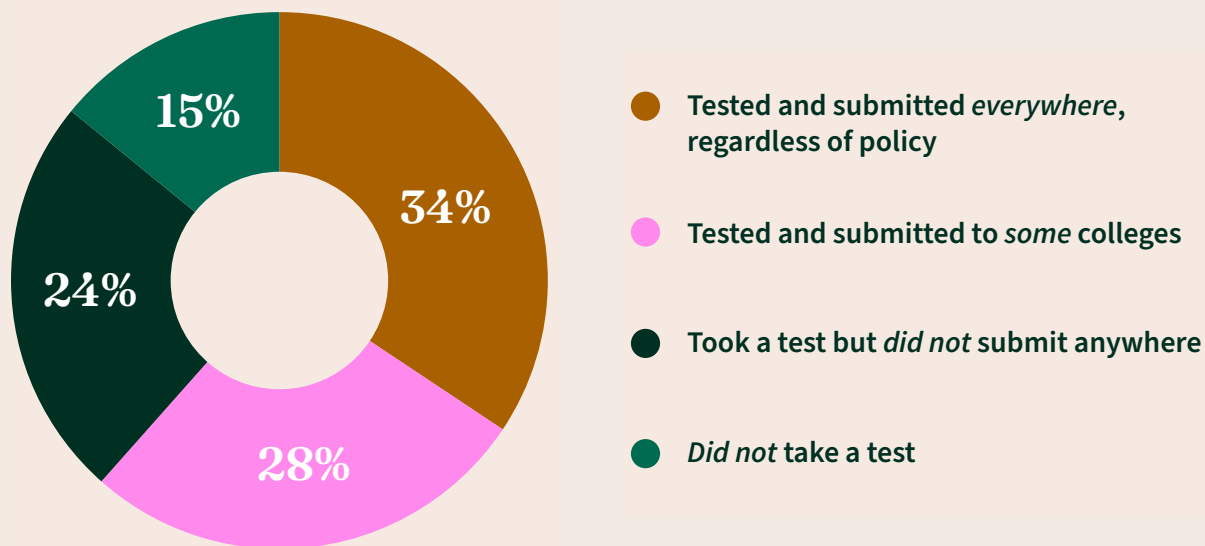
VERY PERSONAL AND SPECIFIC TO MY INTERESTS	13%
SOMEWHAT PERSONAL	28%
ALL COLLEGES LOOKED AND SOUNDED ALIKE	59%

88% of those who received at least some personalized materials said that it made them feel more valued.

- 36% of respondents said they received very relevant outreach from colleges, but 19% said all colleges looked and sounded the same.
- 88% of students who received at least some relevant outreach from colleges said it made them feel more valued.

Standardized Testing

There are plenty of voices with an interest in keeping students taking standardized tests, so colleges that don't require it need louder and more clear outreach to prospective students and advocates.



Students don't understand—or worse, don't trust—test-optional policies.

39% of respondents did not submit test scores when they applied, but 34% submitted them everywhere—even if they weren't required to. That is down slightly from 44% not submitting in 2021.

Nearly two-thirds of respondents who submitted test scores when they didn't have to said they thought it would help them be accepted. Most concerning, 41% indicated that they did not believe colleges that said they did not require test scores.

Campus Visits

Some argue that a campus visit signals a likelihood to enroll, but it's just as plausible that a likelihood to enroll signals a higher likelihood to visit. In either case, there was a reflection in the trend of declining campus visits back toward pre-pandemic behaviors, but attending high school visits are less appealing.

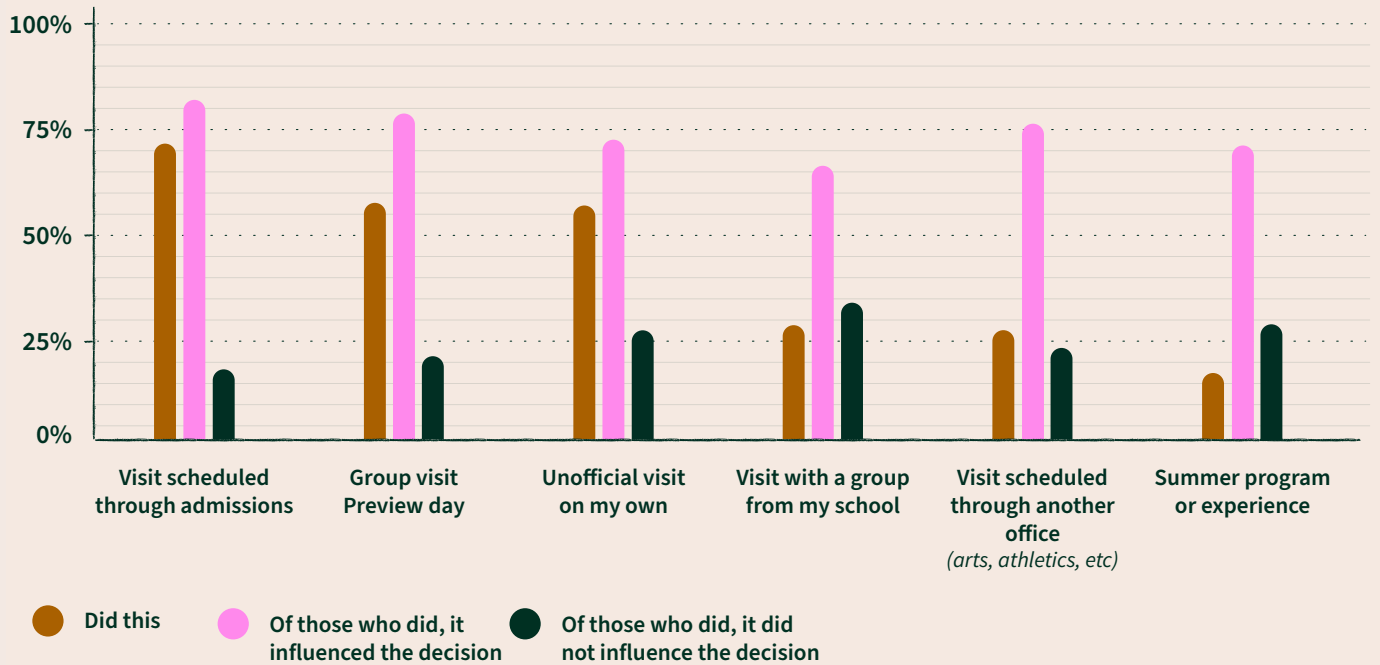
VISITS TAKEN

	PRE PANDEMIC	2020	2021	2022	2023
0	6%	15%	28%	19%	12%
1	15%	18%	21%	22%	20%
2	20%	20%	19%	21%	21%
3	19%	16%	13%	15%	14%
4	12%	9%	6%	8%	10%
5+	29%	22%	12%	15%	22%

While more students visited campuses this year than in the past three, there were still twice as many students who did not take any visits than before the pandemic. But compared to 2021, half as many students reported that being unable to visit colleges was an issue.

Visit behaviors are changing, affecting what a visit signals.

CAMPUS VISIT EXPERIENCES



71% of students who visited a college scheduled through an admissions office. These visits were reported to be the most influential with 82% saying they affected their decision to enroll. Only 42% of students attended a group visit, but 79% of them said that it influenced their decision. Just 29% of students visited a college campus with a group from their high school, and of those who did it was the least influential.

The share of students visiting five or more campuses has returned to 2020 levels, but is still 24% lower than before the pandemic.





High School & College Fair Experiences

- ◆ Consistent with what we learned in our [Effectiveness of Recruiting Travel and Campus Visits in 2023](#) survey, the majority of enrolling students did not attend a college fair or meet with admissions staff who visited their high school.
- ◆ Though they provide visibility, only 6% of students reported meeting with a counselor during a lunch visit.
- ◆ 16% of students only met with an admissions counselor at their high school, 12% only did at a college fair, 13% met with staff at their high school and at a college fair, and 58% did neither.

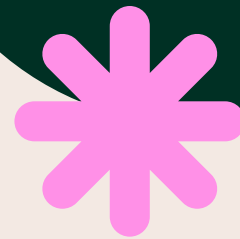
Barriers and Bumps in the Road

13% of respondents indicated that their enrollment decision was affected by state or local politics. However, 59% said they were unaware of the politics where they were enrolling.

Students from U.S. Territories, Delaware, and Oregon were the most likely to have had their decisions influenced by politics and those in South Dakota, West Virginia, and Kansas were the most likely to say they didn't pay attention to politics around education. The majority of respondents in Iowa and Idaho reported following how politics was being involved in education, regardless of influence.

More than a quarter of gender nonbinary or other gendered students reported that politics influenced their decisions and the majority also reported following how politics was being involved in education.

After a slight dip in 2022, more students reported challenges in their search and application process (92%). The biggest challenges were applying for financial aid, deciding where to apply, and writing essays.




HOW STATE OR LOCAL POLITICS AFFECTED INTEREST

YES, IT AFFECTED MY DECISION	13%
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AWARE OF, BUT DID NOT AFFECT MY DECISION	28%
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I WAS NOT AWARE OF IT	59%
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The application process itself can add roadblocks to enrollment.

Essays and standardized tests aren't the only barriers to applying to college.


Students identified a number of other things that prevented them from applying to a college they were interested in.

57% of respondents didn't apply because of issues with the application process, up marginally from 54% last year. **The most common issues were application fees, length of the application, or too many required additional materials.** Additional materials saw the biggest increase, moving from 19% to now 23% of students citing them as a barrier.

Nearly half as many students cited application deadlines being too early this year compared to last, either because they felt more prepared or they avoided colleges with earlier deadlines.

There was a significant increase (25%) this year in the number of students saying that applications were too long; 20% of all respondents expressed this sentiment and said it caused them to either not start or abandon an application to a college they were interested in attending.

Fewer students are identifying application fees as a barrier, but at the same time more students reported choosing not to submit applications because of the fees.



Financial aid is vital to access, but the process to receive it is a barrier.

The majority of students need financial aid to attend college, but navigating the FAFSA and individual college aid offices is a challenge for them, and not all those who would earn aid receive it.

44% of students said that applying for financial aid was the biggest challenge they faced this year.



Only 42% of students reported they were confident they could afford the college at which they were enrolling.

72% indicated that they were receiving scholarships or grants to attend the college at which they were enrolling. This varied by institution type; it was 88% for those enrolling in private 4-year institutions, 72% at for-profit 4-year institutions, 70% at public 4-year institutions, 45% at a career or technical school, and just 42% for community colleges.

Just over half of students reported receiving merit aid. About one-third said they were granted need-based aid, 4% received arts scholarships, and 3% received athletic scholarships.

The percentage of students who plan to take on loans continued to rise to 57% this year.

At the same time, the share of students who intend to work while enrolled has dropped from 80% pre-pandemic to 75% this year.

How students evaluate price and cost are different.

price

/prīs/ (noun)

how much something is stated to be worth

COST

/kôst,käst/ (noun)

what is actually paid

Price and cost are different concepts and students approach them differently as well. The sticker price can be a deterrent to consideration, but the impact of cost on decisions appears much more flexible based on affinity and perceived value.

Pre Pandemic

Before the pandemic, 55% of students said that they were ruling out colleges based solely on their total published price—their sticker price. This year it was 83%. The majority of students said they would not consider applying to a college with a total price (before aid) over \$40,000 per year.

Present Day

This year, 32% of students who were accepted to multiple colleges said they were enrolling at a college that is more expensive than their other options, 31% at one about the same cost, and 38% at one less expensive. Those concerned about affording their chosen college and those taking on loans were both more likely to be attending a more expensive college.

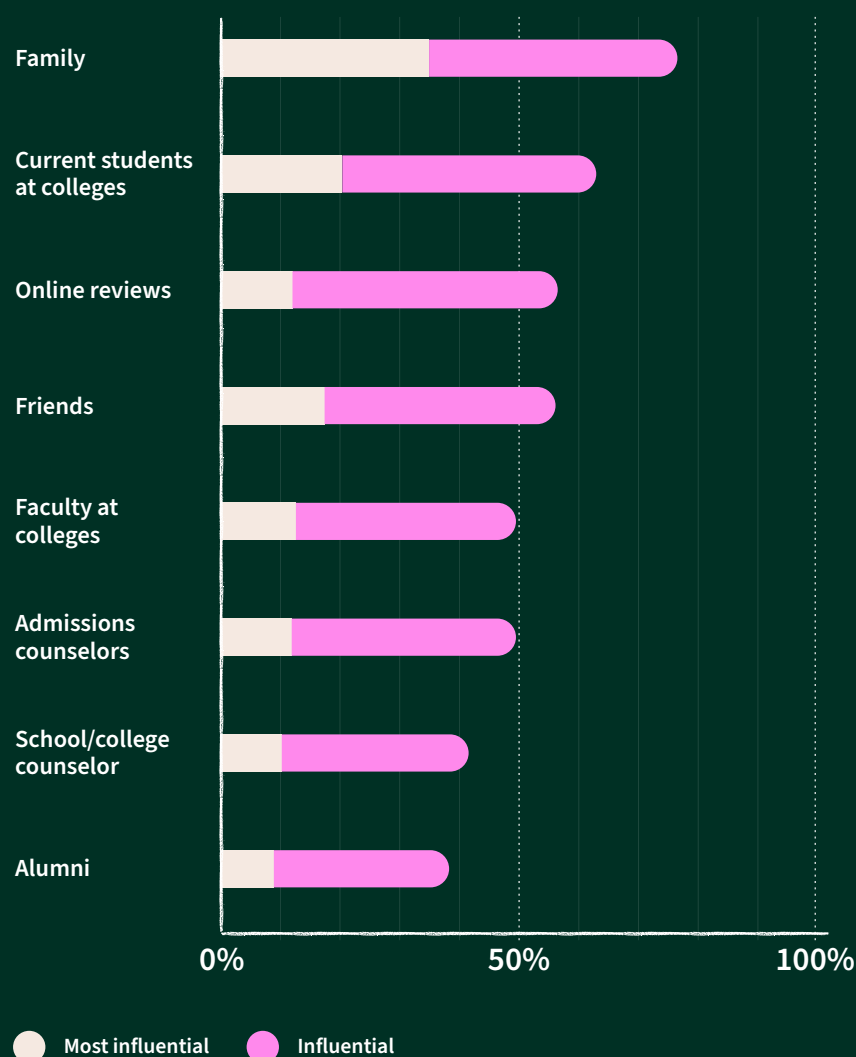
Students who chose 2-year institutions were much more likely to be enrolling at less expensive options. Just over half of those who selected career or technical colleges and 71% of those who selected community colleges were going to a less expensive option.

Students enrolling at a for-profit 4-year institution were the most likely to be selecting an option more expensive than their others—in fact, the majority of respondents were paying more than their other options. Just 27% of their public-enrolling peers and 42% of those enrolling at private 4-year colleges were paying more to attend them.

Enrollment Decisions Aren't Made Alone

Students rely on their advocates and peers for support throughout the entire search, but especially once it's time to make their decision.

INFLUENCERS IN THE COLLEGE ENROLLMENT DECISION



Students reported that the people who were most influential in their enrollment decisions were family (77%), current students at a college (62%), and online reviews (56%). Admissions counselors (49%) and school counselors (41%) tend to be thought of more readily, but carry less influence according to students.

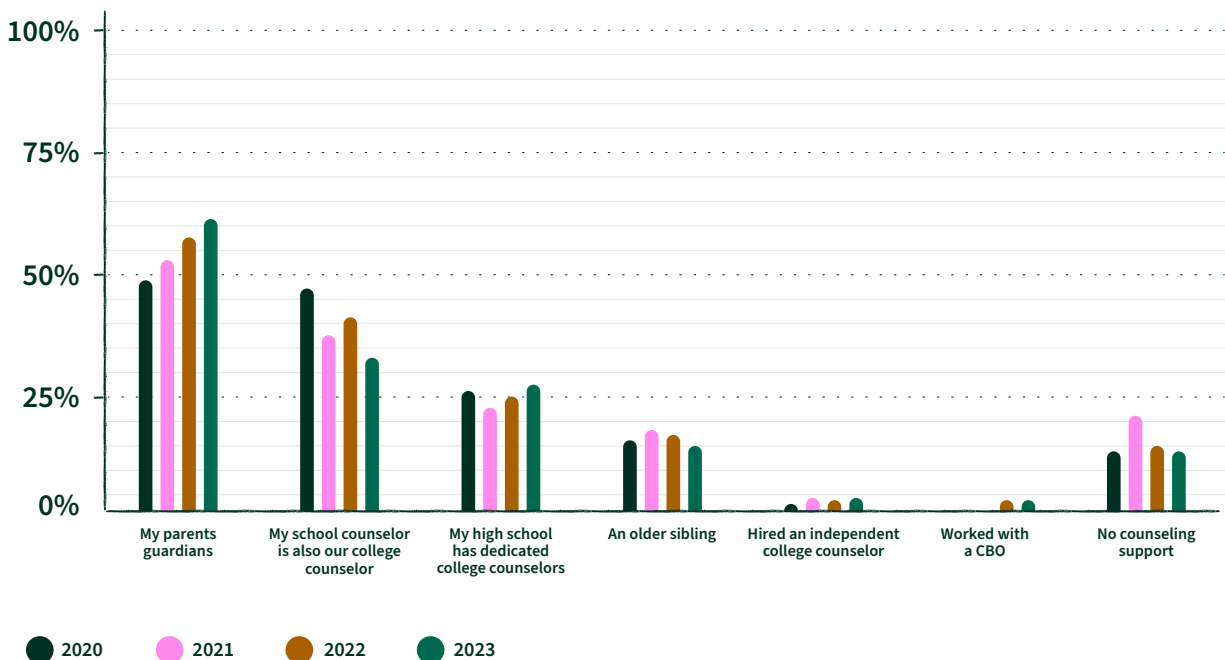
Faculty at colleges were slightly more likely to influence an enrollment decision than admissions counselors, highlighting a touchpoint opportunity.

This year, online reviews actually surpassed friends to become the third biggest source of influence, increasing 44% since 2021. Having a strategy to collect and use online reviews will continue to grow in importance.

Enrollment influencers are found close to home ...and their locker.

Compared to previous years, parents are playing a larger role in the college search and selection process, but it's worth noting that students need more school counselors available to support them.

COUNSELING SUPPORT STUDENTS RECEIVED



Parent/guardian involvement has increased by 24% since 2020 while reported support from school counselors has declined by 18%. For the first time, fewer students reported support from their counselors than their parents or guardians.

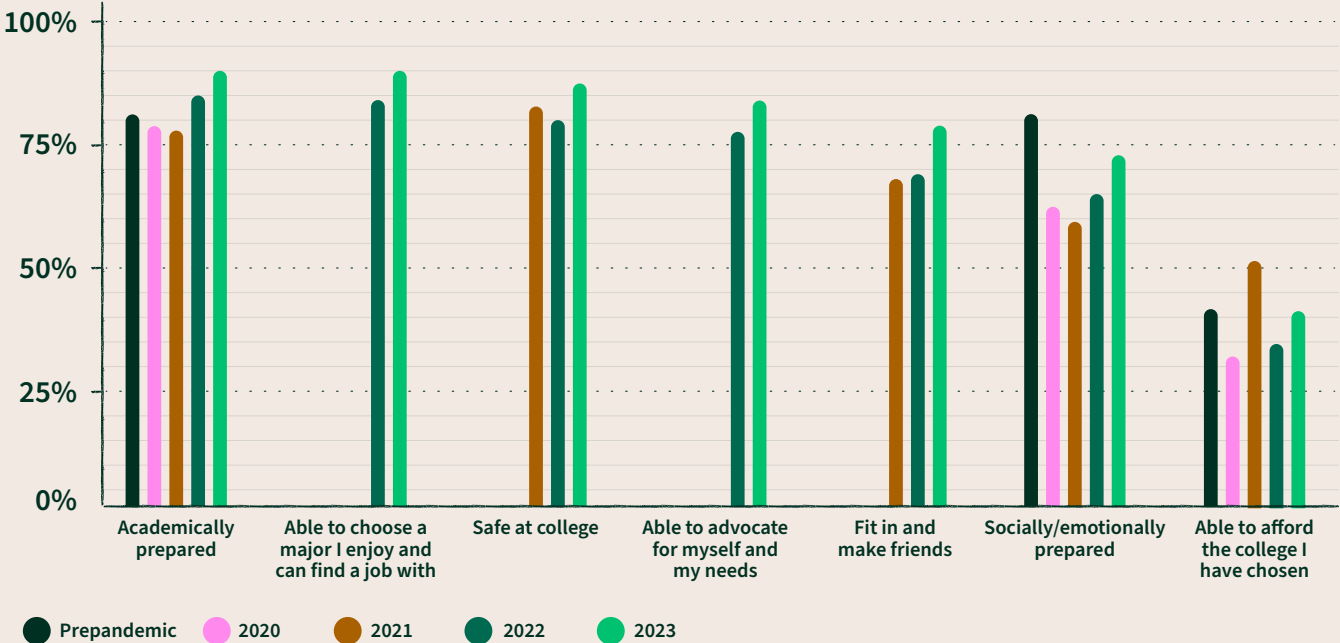
Traditionally underrepresented students were actually more likely to have a counselor supporting their search—64% versus 55% of their peers.

This year saw the largest number of students saying that a lack of a school counselor was a challenge; higher than during the pandemic and double what it was pre-pandemic (up 40% from last year to 21% of all respondents).

Student confidence in their preparation and abilities is high.

Students' concerns about college preparedness are diminishing, but should still be addressed during the recruitment process. Hopefully student confidence translates to success on campus.

STUDENT CONFIDENCE



Across the board, the class of 2023 was more confident than any class since the start of the pandemic.

Students were less confident about their academic preparation during the pandemic, but confidence has risen 15% since, and this year 90% of respondents felt confident they would be academically prepared for college.

Students were still much less confident than before the pandemic that they would be socially and emotionally prepared for college, but after hitting a low of 59% in 2021, their confidence has rebounded to 73% this year.

The community that students will join is extremely important to them.

Once again, students reported that the most important aspect of a campus community is diversity. One-third said that a diverse student body was a must-have, and another 45% found it appealing. A diverse faculty and staff was a must-have for 26% and appealing for another 47%.

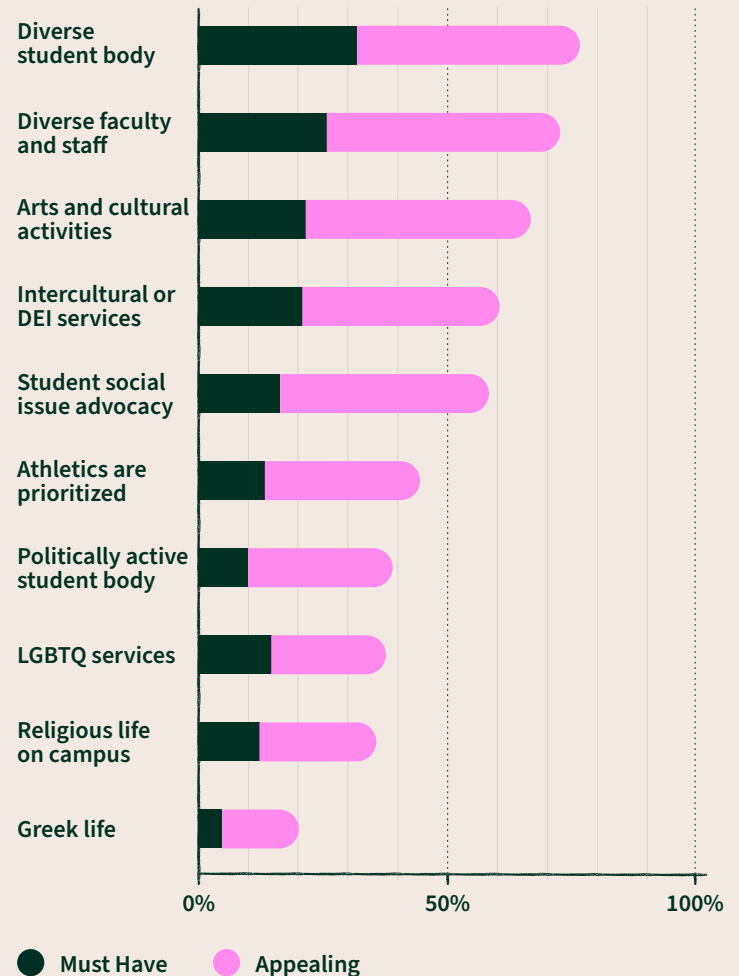
It's essential to convey a sense of place throughout the recruitment process because of how important the community is to students.

Other community features that appealed to the majority of students were an emphasis on arts and culture, intercultural or DEI services, and an environment of social activism. Again this year, Greek life was the least appealing with only 21% of students saying it was.

Colleges that prioritize athletics have declined in appeal by 30% over the past two years, falling from 64% to 45%. At the same time, campuses that prioritize the arts have increased in appeal by 8% up to 67% of students wanting it.

Religious life on campus is becoming more appealing. Pre-pandemic, 7% of students said it was important in their decision; but after moderate gains, 36% of respondents said that it was this year.

WHAT STUDENTS WANT IN A CAMPUS COMMUNITY



Over 90% of students agreed that scholarship availability and campus safety were important to them.

More than three-quarters also said the variety of clubs and activities, dorms, dining options, and distance from home were also important factors.

Q: Were HBCUs important to you?

26% of students considered an HBCU
and 4% will be enrolled.

Q: Were HSIs important to you?

17% of students considered an HSI
and 2% will be enrolled.

Methodology and Respondent Demographics



In the eighth year conducting the Niche Senior Enrollment Survey, we received completed responses from 12,200 students.

Students who had not yet made their decision were disqualified since we want to focus on the process all the way from search through enrollment. The survey was sent to seniors who had registered a profile on the Niche platform, available on the site for unregistered users and discoverable from searches. The survey was open from May 1 to June 11, 2023. This is a split from prior surveys in that we waited until May 1 to open the response window.

There was no significant change in the race or ethnicity of respondents from prior years.

There was no significant change in the race or ethnicity of respondents from prior years. If a respondent identified as Asian or Native Hawaiian or Pacific Islander, we provided additional options to gain further insight into their ethnic identity. These options are taken from guidance from the Southeast Asia Resource Action Center “Everyone Deserves to Be Seen” policy brief. In the results below, any Asian ethnic group that represented at least 0.5% is shown while others are

grouped as Asian - Other. We provided over thirty choices for race and ethnicity, so for space in some charts they will be grouped. However, in the interactive visualizations on the Niche Enrollment Insights blog, they will all be available for exploration.

RACE OR ETHNICITY

AFRICAN AMERICAN OR BLACK	14%
AMERICAN INDIAN OR ALASKA NATIVE	<1%
ASIAN - CHINESE	2%
ASIAN - FILIPINO	1%
ASIAN - INDIAN	2%
ASIAN - KOREAN	1%
ASIAN - PAKISTANI	<1%
ASIAN - VIETNAMESE	1%
ASIAN - OTHER	1%
CAUCASIAN OR WHITE	34%
HISPANIC OR LATINX	13%
MIDDLE EASTERN OR NORTH AFRICAN	1%
MULTIRACIAL	11%
NATIVE HAWAIIAN OR PACIFIC ISLANDER	<1%
I DO NOT KNOW	1%
CHOSE NOT TO RESPOND	18%

Household income quintiles from students were largely representative, with some students choosing not to respond and others not knowing their household income. Student responses as to their parents' education level varied in some places from the most recent [US Census data](#). There were fewer students whose parents had a high school diploma as their highest degree, but others were similar with expected higher attainment for students who are more likely to be enrolling in college.

HOUSEHOLD INCOME

UNDER \$25,000	10%
\$25,000-\$49,999	13%
\$50,000-\$79,999	14%
\$80,000-\$130,000	15%
ABOVE \$130,000	12%
I DO NOT KNOW	18%
CHOSE NOT TO RESPOND	19%

PARENTS' EDUCATION LEVEL

LESS THAN A HIGH SCHOOL DIPLOMA	5%
HIGH SCHOOL DIPLOMA	13%
SOME COLLEGE, NO DEGREE	9%
ASSOCIATE DEGREE	7%
BACHELOR'S DEGREE	23%
MASTER'S DEGREE	19%
DOCTORAL OR PROFESSIONAL DEGREE	6%
CHOSE NOT TO RESPOND	18%





Well Deserved Appreciation and Your Next Steps

We'll be discussing these results in an upcoming webinar and we encourage you to stop by our booth at the NACAC, AACRAO SEM, or AMA Higher Ed conferences in the fall of 2023 if you want to chat more about Niche data and insights.

This project could not be done without a team supporting the survey design, collection, and visualization. Working with a team of people who are focused on making the information as accessible and valuable as possible ultimately in support of students is an incredible experience.



Thank you all!

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