

College enrollment data and student surveys paint a troubling picture about postsecondary transitions during COVID-19. How can states respond?

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Most [living-wage careers](#) require postsecondary degrees and certificates. As the economy [heads into a recession](#), a postsecondary credential could be even more important; during the last economic downturn, [95 percent of newly added jobs](#) required a college credential.

But this year, prospective freshmen and previously enrolled college students faced multiple pressures because of the pandemic—from online learning to increasing financial demands to the desire to remain close to home. For many, those pressures meant changing their college plans.

We looked at college enrollment data from the [National Student Clearinghouse Research Center](#) and 13 student perception surveys from the spring and summer to understand college-going patterns during the pandemic:

- While undergraduate enrollment is down by 4 percent in 2020-21, the steepest declines are for young students attending college for the first time, particularly graduating seniors from high-poverty schools and those attending community college.
- Financial stress and remote learning caused students to reconsider their college plans, with enrollment at primarily online institutions increasing.
- Students of color were more likely to say they planned to put off or change their college plans. In the fall, freshman enrollment declined most for Native American, Hispanic, and Black students.
- Students still recognize the value of higher education. Across all ages, enrollment in bachelor's degree programs holds steady.

States and K-12 systems can support students most impacted by setting policy that helps students earn and transfer college credit, find alternatives to for-profit institutions, and make informed postsecondary education choices.

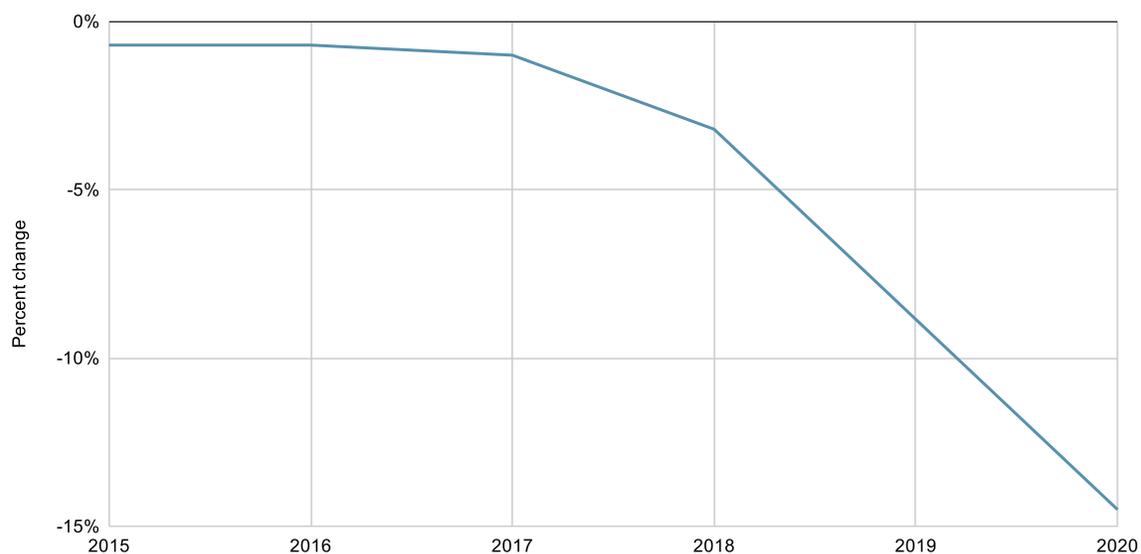
Declines in college enrollment are driven by young students attending college for the first time and students in the community college sector

Undergraduate enrollment rates across all students and institutions are down by 4 percent this year, according to the [National Student Clearinghouse Research Center](#). This is the ninth consecutive year that college enrollment [has declined](#), although in previous years it was by 1 to 2 percentage points.

When looking specifically at traditional college-aged students enrolling for the first time, we see steep declines across all groups. Between fall 2019 and fall 2020, enrollment for these students dropped 14.5 percent (figure 1).

Figure 1. Enrollment Is Down by 14.5 Percent among Freshman College Students 18-24 Years Old

Year-to-year percent change in enrollment among first-time students, 18-24 yrs old



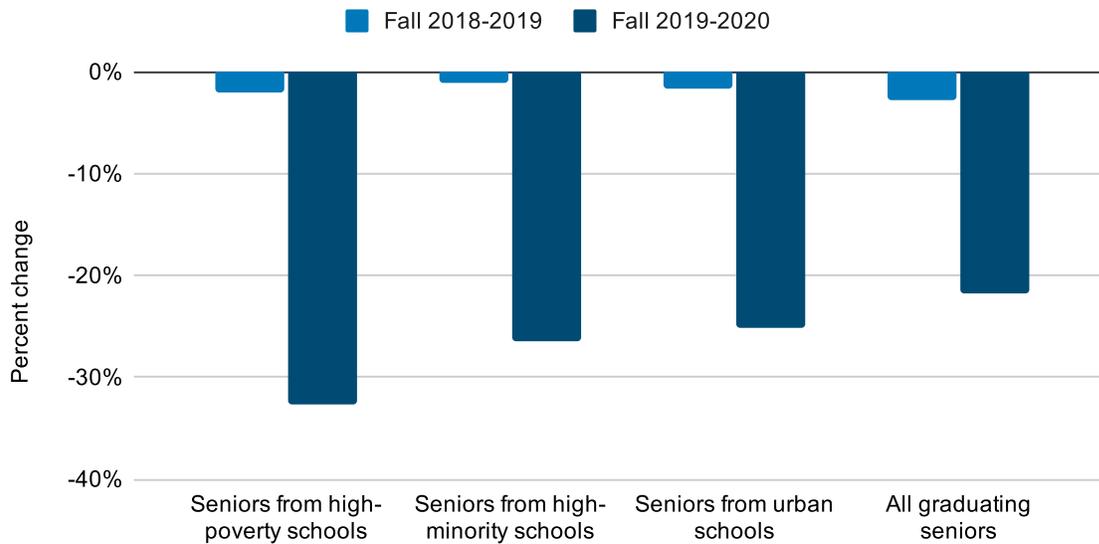
Source: National Student Clearinghouse Research Center: [Fall 2020 Enrollment as of September 24](#); [Current Term Enrollment- 2017](#).

Note: There are no data for the percent change between fall 2018 and fall 2019.

Enrollment losses were greater among graduating seniors, where we saw enrollment decline by 22 percent when compared to the 2019 graduating class. Enrollment dropped the most for graduating seniors from high-poverty schools (figure 2).

Figure 2. Enrollment Declined by 22 Percent for High School Seniors In 2020

Percent enrollment change from previous year for graduating seniors by high school type, for all postsecondary institutions

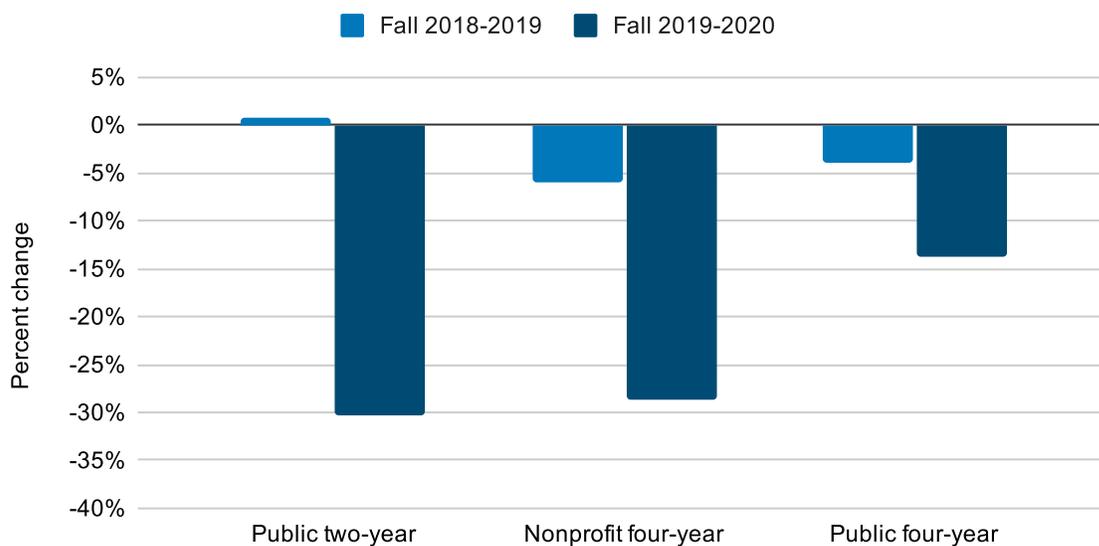


Source: National Student Clearinghouse Research Center: High School Benchmarks 2020 with a COVID-19 Special Analysis.

When looking at enrollment trends for high school seniors, enrollment into two-year colleges declined the most, at 30 percent (figure 3).

Figure 3. The Steepest Enrollment Declines for Young Students Were at Public Two-Year Colleges

Percent enrollment change for graduating high school seniors, by type of postsecondary institution



Source: National Student Clearinghouse Research Center: High School Benchmarks 2020 with a COVID-19 Special Analysis.

This trend is different from the last economic downturn, when enrollment in community colleges increased. Between 2007 and 2008, enrollment in two-year public colleges increased (+1.5 percent) across all age groups. In 2020, the decline across all age groups was -9.4 percent.

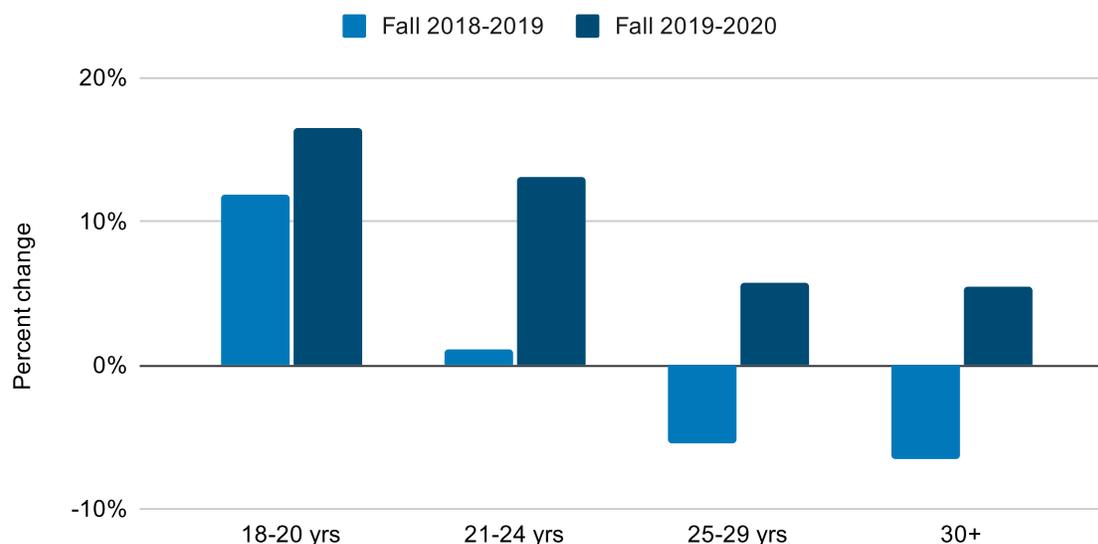
Other data from the National Student Clearinghouse show relative enrollment for all freshman students 18 to 20 years old, which includes those who attend a postsecondary institution one or two years after high school graduation. When looking at these students, enrollment was also down for all institutions. But it declined the least among for-profit, four-year institutions, by only -3.2 percent, compared to an average decline of -11.5 percent across public and nonprofit four-year colleges.

Even though for-profit colleges make up only 5 percent of all freshman students, enrollment increases between 2018 and 2019 suggest they are making inroads attracting younger, first-time students.

The relatively lower decline in for-profit enrollment may be driven in part by traffic to online classes, which are most likely offered at for-profit, four-year colleges. Enrollment at primarily online institutions rose by 16.5 percent for students 18 to 20 years old, continuing a trend from the previous year (figure 4).

Figure 4. Despite Enrollment Declines Generally, Enrollment Increased In Online Institutions, Especially for Younger Students

Percent enrollment change from previous year at primarily online institutions, by age



Source: National Student Clearinghouse Research Center: Fall 2020 Enrollment as of September 24.

Dual enrollment among high school students dropped this year by 4.2 percent, a sharp reversal from last year's uptick of 5.9 percent. This drop in dual enrollment compounds the disruption students are already facing. High school students are the least likely to be prioritized for in-person instruction when K-12 districts phase in hybrid and in-person instruction.

Students are changing their plans because of the pandemic

Student perception surveys (see inset, *Search protocol and survey sample*) conducted between March and August 2020 found that the financial stresses of the pandemic and the shift to online learning on college campuses drove students to change their postsecondary plans. Among graduating high school and current college students in April, **nearly half** of all students (45 percent) said that the pandemic had an impact on their emotional or mental preparedness for college, and about a fifth (21 percent) said they changed their first-choice school.

This was especially true among students of color and students from low-income households. For example, the [SimpsonScarborough](#) survey, which included high school students and currently enrolled college students, found that 41 percent of high school seniors of color said they likely wouldn't go to college, compared to 24 percent of white seniors. Students of color were also twice as likely to change their top-choice school; this was true for 33 percent of students of color versus 15 percent of white students.

Fall enrollment trends matched the results of student perception surveys. Enrollment declines were greater for students of color than for white students (figure 5).

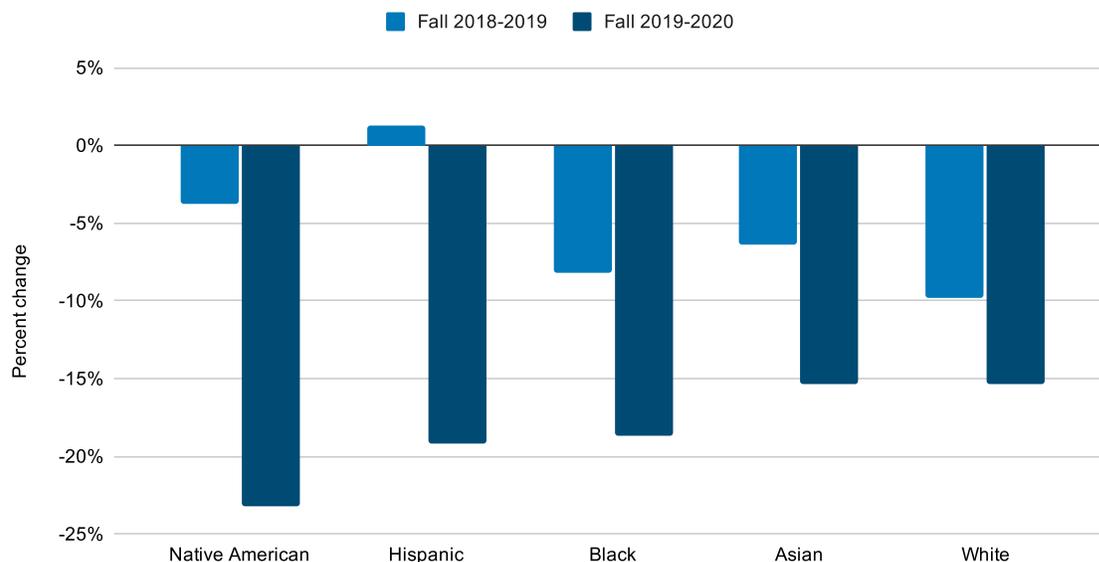
Search protocol and survey sample

We conducted an online search of surveys of high school seniors in spring 2020, students enrolled in college during the spring or fall of 2020, and students planning to enroll in college as of the summer. We excluded surveys without a clearly explained methodology. We selected the largest national surveys in the spring and used all summer and fall surveys that met our criteria. We intentionally sought to include surveys of students enrolled in community colleges.

Our 13 surveys include: 8,000+ community college students share their COVID-19 stories (June 2020); California Student Aid Commission (July 2020); Class of 2020 Survey: Half of graduating seniors change plans for after high school due to COVID-19 (May 2020); COVID-19 and US higher education enrollment: Preparing leaders for fall (May 2020); COVID-19's impact on current and future college students (August 2020); June college student survey during COVID-19 (August 2020); National student survey - The fragility of trust (July 2020); Senior Fall Decision: The After-May 1 Deadline COVID Survey (May 2020); Students say they'll sacrifice fun if they can return to campus (July 2020); The Impact of COVID-19 on Student Experiences and Expectations: Evidence from a Survey (June 2020); Understanding America Survey (November 2020); When the Traditional Four-Year Experience Becomes a Virtual Reality (August 2020); Why a Covid-19 World Feels Both Tiring and Hopeful for College Students (August 2020).

Figure 5. Freshman Enrollment Declined Most among Native American, Hispanic, and Black Students

Percent enrollment change from previous year for freshmen in all undergraduate programs across all age groups, by race/ethnicity



Source: National Student Clearinghouse Research Center: [Fall 2020 Enrollment as of September 24](#).

Virus infection patterns may have influenced postsecondary enrollment decisions. [COVID-19 hospitalization rates](#) for Hispanic and Native American individuals are 4 and 4.1 times higher than those of white individuals, respectively.

Surveyed students cited finances as a primary driver for changing or deferring college plans. This is not surprising during a time when [7.9 percent of families](#) were unemployed. Forty percent of surveyed students enrolled at the [University of Phoenix](#) reported losing a job, internship, or job offer. Financial stresses were not felt evenly across student groups. A survey among [North Carolina community colleges](#) found that Black students were overrepresented in those who have been unable to pay their bills or pay for rent/mortgage.

But while financial stress is impacting students, it is not the only factor. Surveys paint a more complex picture, with students also citing aversion to online learning and a desire to stay close to home as reasons for changing their college plans (see inset, *Tuition and location major reasons for changing college plans*). In two separate surveys, [33 percent of graduating seniors](#) and [34 percent of four-year college students](#) said they would change college plans if classes

Tuition and location major reasons for changing college plans

Respondents to the [McKinsey student enrollment survey](#) cited finances as the primary reason for reconsidering their top choice, followed by location. 73 percent of surveyed high school senior FAFSA applicants in [California](#) cited personal finances as their biggest concern (73 percent) vs. online classes (82 percent) or being far from home (33 percent). In contrast, the [Third Way and New American survey](#) found that students were twice as likely to change their plans and apply to schools closer to home (41 percent) than to apply to schools with lower tuition rates (21 percent).

went online. Other surveys found similar rates of unease (see inset, *Online learning influenced college planning*). A study of Vermont Free Application for Federal Student Aid (FAFSA) applicants found that [attitudes to remote learning differed by race/ ethnicity](#): white students were more than twice as likely as students of color to report they would attend if classes were online (46 percent vs. 20 percent).

Online learning influenced college planning

Twenty-two percent of surveyed [California FAFSA applicants](#) cited online classes as the reason they are no longer planning to attend college. Twenty percent of respondents to the [SimpsonScarborough](#) survey said they would change their college plans if their school of choice provided online instruction; 12 percent said they would take a gap year.

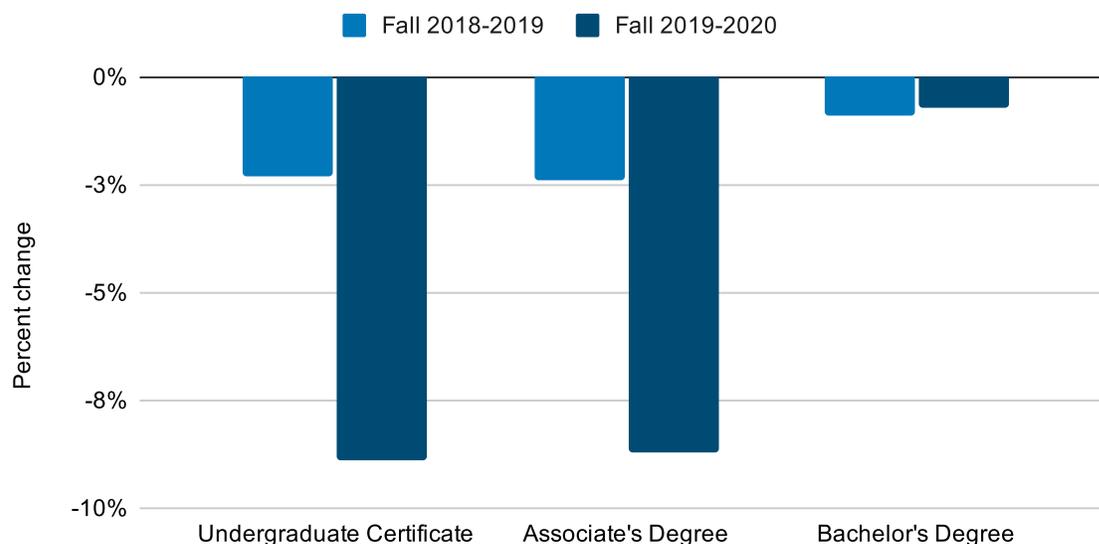
But students still see the value of higher education

COVID-19 has changed the college calculus for students in the near term, but there are indications that prospective students remain committed to pursuing higher education. The [Understanding America Survey](#)'s nationally representative sample found that 22 percent of current college students value a higher education more than before the pandemic started—even if they still question the cost. [Students of color and those from low-income households](#) are more likely to value education in response to the pandemic than their white and higher-income peers. And, in contrast to fall enrollment patterns, students reported that they are much more likely to value a two-year school than a four-year school. This demonstrates a commitment to furthering education across all groups, even in the face of financial uncertainty.

But at least this fall, students were most willing to bet on a bachelor's degree. Enrollment in bachelor's degree programs [held steady](#) in 2020, with a decline of only 0.7 percent, about on par with a 0.9 percent decline in 2019 (figure 6).

Figure 6. Enrollment in Bachelor’s Degree Programs Remains Steady

Percent enrollment change from previous year across all ages, by degree program



Source: National Student Clearinghouse Research Center: Fall 2020 Enrollment as of September 24.

By contrast, enrollment in undergraduate certificate and associate’s degree programs are both down (-9 percent).

Implications

September enrollment trends indicate crisis reactions that could have long-term implications for economic mobility. Two-year colleges traditionally [enroll a large proportion](#) of students from low-income households, first-generation students, and students of color. Certificate programs and associate’s degrees, which are more likely found at two-year institutions, [can be linked to career attainment](#) at similar rates as bachelor’s degrees and [can offer](#) a pathway to a range of living-wage careers. If students are staying away from community colleges and certificate and associate’s degree programs, they are potentially missing out on opportunities for gainful employment in the future.

Similarly, dual enrollment [offers a pathway](#) to college for many students, resulting in a greater likelihood that they will attend and complete college. But with dual enrollment down this year, students are missing chances to become accustomed to the demands of postsecondary work and earn college credit, sometimes for [free or at a reduced rate](#).

Enrollment in primarily online institutions and for-profit institutions [was already increasing](#) for young, first-time students prior to the pandemic. Over the spring and summer, those institutions that are for-profit and online sought to [expand their market share](#), promising easy financing and a safe learning environment. However, for-profit institutions often [leave students](#) with limited job opportunities and high default rates. And [completion rates are lower](#) among for-profit institutions than completion rates at public and nonprofit institutions.

These preliminary data indicate that students are shying away from two-year colleges. At the same time, enrollment increased in primarily online institutions. States can take actions to prevent short-term pandemic shifts from becoming entrenched trends that could exacerbate economic inequality.

States can improve access to a postsecondary credential through a combination of resource allocation, policy, and technical assistance. Specifically, they can:

Help their public colleges compete effectively with for-profit institutions by supporting them to increase online course offerings. More online higher education could also help high schools maintain or expand dual enrollment. Even prior to the pandemic, [community colleges](#) and [four-year institutions](#) were trying to expand online programs to keep up with demand. States have a role to play in quality and accessible expansion through [technical assistance](#), grants, and [monitoring](#). States can encourage online course [co-ops](#) across public colleges so institutions can focus on quality, not quantity.

Create more flexible pathways to degrees and high-wage jobs. States can use [prior learning assessments](#) to award college credit for nonaccredited learning, whether through work, internships, community service, or self-learning. Some of these opportunities, like the [School of the New York Times' Gap Year Online program](#), targeted students who deferred enrollment this year.

States can improve [articulation agreements](#) so students can easily transfer credits earned through dual enrollment, online colleges, or “[gap year](#)” [college programs](#).

And states can expand [stackable credentials](#), which let students earn career certificates that they can acquire more easily than a full-fledged degree, and that hold value in the job market, but also allow students to easily return to college to work toward a degree.

Improve school-level supports that help students maintain momentum into college. States can require that high school teachers offer college and career counseling [through an advisory](#) or homeroom model, like [Minnesota](#) does, or increase training and incentives for such a model. Students would have access to adults who are able to help them apply for financial aid, identify student interests and competencies, and weigh the benefits of different programs, certificates, and diplomas. Focus should be placed on students who appear to be struggling the most with the transition to college: students of color and those from schools in underserved communities.

Trends this fall suggest deepening inequality across higher education institutions, which could impact earning potential and financial stability for a generation of students. Secondary schools, districts, and state agencies must act now to support current high school seniors and current postsecondary students so these trends do not continue next year.