

COVID19 & Enrolment



Enrolment projections for fall 2020 have been upended by the COVID19 pandemic. Historical formulae to predict applicant yield, conversion, and student retention could be dangerously misleading, and even forecasts based on prior economic recessions fail to account for unique circumstances this year. This bulletin offers a meta-analysis of 18 recent surveys of almost 54,000 domestic and international students and parents, regarding enrolment intentions for fall 2020. (See page 4)

Traditional-aged domestic and international students and parents are disappointed by online delivery, uneasy about health risks and precautions, anxious about personal and family finances, and hesitant to commit to an uncertain student experience this fall.

Obviously, quantitative market research on self-reported intentions has inherent weaknesses due to selection bias, response bias, social desirability bias, and simple optimism. Results will vary significantly over time, by region, institution type, program type and student segment. Nonetheless, national and international market research provides a helpful indicator of key enrolment trends in this dynamic and unprecedented environment.

Unprecedented Factors

Economic crash: The Canadian economy is poised to experience its worst recession in decades, and potentially a depression to rival the 1930s. Unemployment has soared, although somewhat artificially. Displaced workers may not feel the same urgent need for retraining that they did in the Great Recession of 2008. The Canada Emergency Student Benefit may offset financial strains caused by the lack of summer employment for students, but significant stock market losses will seriously damage RESPs, property values, family savings and capacity to borrow. Traditional-age students will be much more likely to avoid the expense of relocating, instead opting to commute to nearby institutions, or take online courses in the least expensive way possible.

Border closures: The federal response to COVID19 began with bans on high-risk countries of origin, and eventually expanded to a ban on all non-Canadians entering the country. A full or partial closure of the border is likely to persist until at least summer 2021, significantly impacting recruitment of on-campus international students not already resident here. Institutions who have been most successful at international recruitment, and have become *dependent* upon those revenue streams, will face incredible budget challenges.

Health crisis: Rising infection and fatality counts from COVID19, and growing awareness of its impact on other causes

of death and permanent disability for people of all ages is shaping public anxiety, magnifying parental caution, and will inevitably reduce student mobility. The likelihood of recurrent waves of infection and lockdown create immense uncertainty for students contemplating a relocation to campus housing. Again, commuter institutions in large urban areas will benefit, while institutions dependent on recruiting students outside their local catchment will struggle.

Course delivery: The abrupt shift to alternate delivery was ill-received by 55-65% of students this spring, particularly students in applied college programs. Many are expressing reluctance to return to more online instruction this fall, and a significant number would rather defer study for up to a year until they can study online. Those willing to undertake online study may opt to take a partial course load. The “digital divide” will also pose a major hurdle to access and equity: 14% of Canadians, 59% of rural Canadians, and 72% on First Nations reserves have no reliable internet access at home.

Social distancing: Public health officers will likely prohibit gatherings of 100 or more (quite possibly 50 or more) until 2021, at least intermittently. Institutions with smaller course sections and sufficiently large classroom spaces to permit two-metre social distancing could potentially continue offering in-person classes. Large undergraduate lectures will necessarily be online, although small labs or tutorials might continue in person. No reasonable scenarios for the fall include a return to normal on-campus delivery of courses or services.

Campus experience: For residential destination universities in particular, the traditional extracurricular and social experience has been almost entirely eliminated by the shift to online clubs, services and athletics. The high school class of 2020 is still grieving the loss of graduation, prom, and sports championships; they will be understandably reluctant to

pay full tuition for a pale shadow of the first-year experience they have eagerly anticipated for years. Institutions that have historically depended on their campus as a major attraction, whether residences or dining halls, athletic facilities or green spaces, will be considerably *less* attractive in an online year.

Brand perceptions: Perceptions of academic quality could be disrupted entirely in a world of online delivery. Established online providers with proven interactive platforms and assessment systems may be much more appealing than smaller, traditional institutions. The most elite universities may see a decline in application volumes, but will still be able to fill their classes by digging deeper into their waiting lists. Inexpensive local community colleges may see an increase in demand for university transfer courses. Enrolment at mid-market institutions outside major urban areas will likely be hardest hit by the effects of the pandemic.

Recruitment competition: PSE recruiters have been forced to shift from campus open houses and tours, high school visits and catered receptions to online chats, livestreams, and one-on-one interactions via social media or Zoom. Institutions with sophisticated lead-tracking and CRM systems in place will be vastly better prepared to manage their applicant pipeline this summer. Some institutions are likely to get much more aggressive at offering scholarships, bursaries, and potentially also [other perks](#) to students as September draws closer.

Cabin fever: In early April, a [StatsCan](#) survey found that Canadian youth were apparently more concerned about being confined at home (41%), than about their own health (23%). Forced intimacy with family at home might drive an increase in those eager to go away for PSE, when finances and public health restrictions permit – but perhaps not until 2021.

Across North America, the class of 2024 may be one of the smallest in decades.

A combination of health concerns, travel restrictions, a decimated economy, and uncertain campus experience will encourage many students to commute to nearby campuses, enrol in lower-cost online programs, or simply to defer enrolment until circumstances are less tumultuous.

Data gathered from 18 surveys with more than 50,000 respondents (*see page 4*) indicate that 20-50% of prospective students might be considering a “gap year,” deferring enrolment or declining to register this fall.

Conversion

International Students: 50-60% of these applicants are at risk of deferring enrolment, even if study visas and travel restrictions cease to be an obstacle, particularly if online is the only option. Applicants to *universities* are 10% less likely to defer an online program, so they are closer to the bottom end of this range. (It is worth noting that the majority are willing to defer only for a period up to 12 months.)

Traditional Applicants: 25-50% of domestic high school graduates may be at risk if online is the only option. The numbers are rising as the pandemic’s impact becomes clearer. (If we believe the **parents** of these prospective students, **40-60%** are at risk.) While most of the surveys are American, the Canadian findings also fall within this range.

Non-Traditional Applicants: With rising unemployment, it seems reasonable to assume that displaced workers will pursue certificate, diploma or microcredentials online. Those coping with young children at home may be less willing to take on a full course load. No survey data has yet addressed this population specifically.

Retention

International Students: 30-40% of existing international students may be at risk of attrition if online is the only option, although continuing students already in-country would be less at risk.

Domestic Students: 20-40% may be at risk if online is the only option, or the campus experience is uncertain. College students in applied programs will be at the top end of this range. University students are about 10% more likely to accept online delivery for the year.

Double Cohort Effect

If enrolment demand drops this fall, there will be a rebound effect when the pandemic crisis abates in 2021 or 2022. The impact may be analogous to Ontario’s “double cohort” experience in 2003-5. Some enterprising applicants will take advantage of the lull to enter highly-competitive programs. Many will defer their education until the pandemic ends and classes can resume normally, in September 2021 or perhaps March 2022. And some proportion will defer an extra year or even two, perhaps to give themselves time to earn money, or to avoid the competitive crush for admissions, and the inevitably bumpy restart of campus operations in the new normal.

This unevenness of demand will pose unprecedented challenges for college and university administrators, to manage abruptly *whiplashing* campus capacity and workforce.

Comparative Data from 18 Surveys conducted March-April 2020

Projections in this bulletin draw on the following surveys made public since March 2020:

Fieldwork	Company	Geo	Sample	Market segment	Will /Did defer	Dislike Online	WILL defer online	MIGHT defer	At Risk
Feb 14 - Mar 26	QS	Global	11,000	prospective international students	55%		42%		55%
Apr 3-20	Academica	Global	16,649*	Prospective Canadian international university students			52%		52%
Apr 3-20	Academica	Global	16,649*	Prospective Canadian international college students			61%		61%
Apr	Shiksa	India	850	Indian students	50%		54%		54%
Apr 14	StudyPortals	Global	850	Prospective international	33%				33%
Mar 16 – Apr 22	Educations	Global	7,400	Prospective international students (grad/ug)	47%	55%	47%	39%	86%
Apr	IDP	Global	6,900	current and prospective international students			38%		38%
Mar	Brian Comms	US	405	Parents of HS seniors			12%	45%	57%
Mar-Apr	Lipman-Hearne	US		Parents of HS seniors		61%		56%	56%
Apr	Tyton Partners	US	464	Parents of HS seniors		10%	7%	35%	42%
Mar 17-20	Art & Sci	US	487	High school seniors	8%				8%
Mar 25-30	Simpson-Scarb	US	573	High school seniors	8%			20%	20%
Apr	Art & Sci	US	1,171	high school seniors	37%	59%	60%	8%	68%
Apr 6-13	Academica	Canada	390	Prospective students		65%	7%	36%	43%
Apr 26	Simpson-Scarb	US	2,000	HS seniors and current PSE	10%	85%		26%	20%
?	NACC	Canada	?	Current PCC students	28%				28%
Mar 25-30	Simpson-Scarb	US	513	Current PSE students	7%	63%			7%
Apr 6-13	Academica	Canada	1,133*	Current university students			8%	35%	43%
Apr 6-13	Academica	Canada	1,133*	Current college students			17%	51%	51%
Apr 15-20	Top Hat	US/Can	3,089	Current PSE students		68%	7%	26%	33%

* Two Academica surveys are presented here splitting out the results for college vs university students or applicants. The sample sizes are for the combined market segments.