

2021

Enrollment Trends Pulse Report

Introduction

While 2020 forced higher education institutions to make tough decisions, including pivoting from on-campus to remote learning, 2021 was expected to be a return to normal. The ongoing COVID-19 pandemic, however, has required administrations to maintain online classes, in addition to virtual events and experiences, to keep students engaged and on track.

Enrollment processes have continued to shift as well. Strategies that emerged during the 2020 shutdown remained essential in recruiting throughout 2021, as many campuses had not yet fully returned to in-person learning.

Othot tracked partner institution deposit and summer melt trends and compared final enrollment data of new, first-time students to National Student Clearinghouse (NSC) trends to develop the **2021 Enrollment Trends Pulse Report**. This report provides an overview of enrollment data and an analysis of the enrollment trends of the past year.



Key Findings

The predictive and prescriptive analytics used by Othot partner institutions were key in countering enrollment declines.

- Partner institutions performed significantly better overall, seeing a 6.97% rise in new, first-time student enrollment; this counters the 4.74% dip in enrollment in 2020.
- NSC data shows freshman enrollment decreased 2.60%, compared to 2020's decline of 13.00%.

Enrollment at Census



Experts predicted freshman enrollment would rebound after a disappointing 2020, as students taking a “gap year” were expected to enroll this past fall. The data showed students are continuing to delay college enrollment, with NSC Executive Director, Doug Shapiro, recently telling [US News & World Report](#) that, “Enrollments are not getting better. They’re still getting worse.”

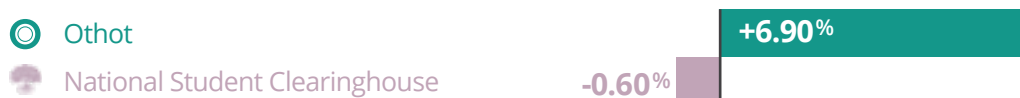
Overall freshman enrollment was down, with four-year public institutions seeing a steeper decline (2.50%) than four-year private schools, which saw a 0.60% decrease¹. Alternately, Othot public partner institutions saw an increase of 7.02%, while private partners experienced a 6.90% increase in enrollment.

Enrollment at Census

Public Institutions



Private Institutions



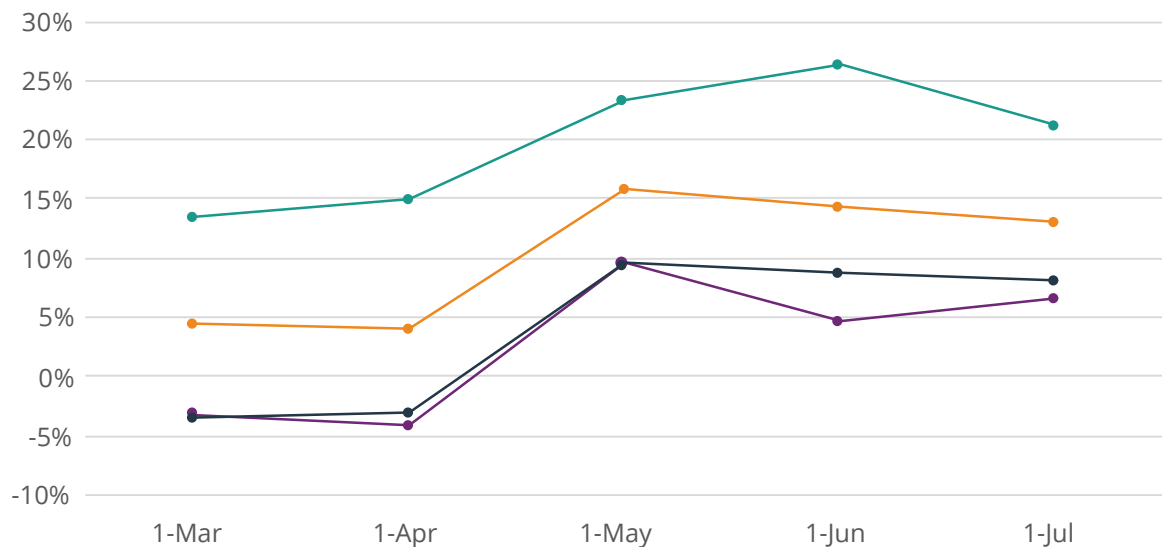
Note: NSC data showed private, for-profit colleges took the biggest hit with an 8.50% decline in enrollment, followed by public two-year colleges, which saw 6.00% fewer freshmen.

¹<https://www.studentclearinghouse.org/blog/undergraduate-enrollment-drops-nearly-8-and-community-colleges-decline-15-since-fall-2019/>

Institutions using advanced analytics continued to counter the enrollment declines experienced throughout 2020. Othot partner institutions saw increases in deposits and saw a slight increase in summer melt, or the percentage of students who placed a deposit but chose not to enroll.

In March 2021, partner institutions experienced a 4.24% increase in deposits year-over-year. April deposits also increased 3.83% over April of 2020, while May 2021 saw the largest year-over-year increase, 15.61%. Deposits continued with positive growth through June and July 2021 as compared to June and July 2020.

Deposit Comparison % Change 2021 vs. 2020



	1-Mar	1-Apr	1-May	1-Jun	1-Jul
Private Deposits	13.55%	15.02%	23.44%	26.46%	21.22%
Public Deposits	-3.38%	-4.30%	9.35%	4.55%	6.31%
Overall Deposits	4.24%	3.83%	15.61%	14.08%	12.79%
Median Deposits	-3.73%	-3.33%	9.34%	8.63%	7.87%

Declines in 2020 were exacerbated by COVID-related stay-at-home orders, but as student life and activities partially resumed in the latter part of 2021, opportunities to reach gap year and graduating students increased. This likely helped fuel the higher enrollment and deposit numbers, particularly among partners using Othot's advanced analytics platform.

This year's data reveals that Othot's public partner institutions did not weather the storm as well as its private partners. However, any dips in deposits or enrollment were minor compared to those experienced last year.

Research Findings

Deposit Rate Data

Average Deposit Rate Across Othot's Partners



April 1, 2021 vs. April 1, 2020

May 1, 2021 vs May 1, 2020

+3.83%

+15.61%

Deposits are up across the board for 2021, with deposits increasing significantly from 2020 dips (-13.00% in April and -4.46% in May of last year).

Deposit Rates by Institution Type



Public Institution Partners

-4.30%

+9.35%

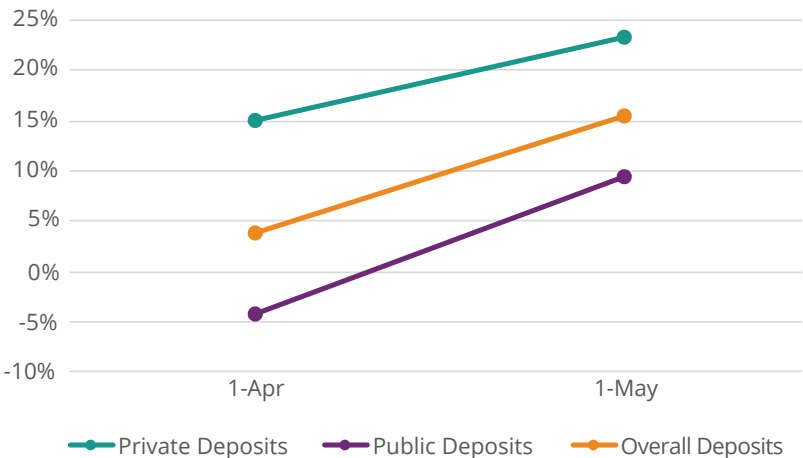


Private Institution Partners

+15.02%

+23.44%

Deposits % Change 2021 vs. 2020



When breaking down the data, the largest jumps occurred for private institutions for April and May, year-over-year, with a nearly 30-point swing from -13.70% to 15.02%, and -4.20% to 23.44%, respectively. While all partners experienced overall gains in deposits, public institutions dropped only slightly in April (-4.30%) as compared to 2020 (-12.70%).

Summer Melt Data

Overall Summer Melt

2020 vs 2021



Overall Comparison

+0.50%

After a decrease of -0.80% in 2020 vs. 2019, melt rate, or the summer melt comparison between the number of canceled deposits to the number of overall deposits for 2021, was up this past year to 0.50%. So, while more students placed deposits, more were also canceling deposits. Negative melt percentages are seen as a positive indicator, as decreased melt equates to an increase in deposits.

Summer Melt by Institution Type

Overall 2020 vs 2021



Public Institution Partners

+1.44%



Private Institution Partners

-0.75%

Both public and private institutions experienced more students melting in 2021 than 2020. This is a shift from last year, where public schools experienced less melt (-0.60% in 2020 vs 1.44% in 2021).

There are several reasons for the increase in melt among Othot's partner institutions. Some indicated that students were mitigating the dynamic admissions process by depositing at multiple institutions, and a few noted that mandated vaccines for students over the summer saw increased melt.



Final Enrollment Data

Enrollment Results Comparison

2020 vs 2021

Enrollment at Census



Final Enrollment Data by Institution Type

Four-year public



Four-year private



NCS data continued to trend downward for 2021, with public and private four-year institutions facing slight drops in enrollment over the previous year. Othot's partner institutions have turned the corner, seeing year-over-year enrollment gains. Four-year private partner institutions saw the biggest gain in 2021 (-4.84% in 2020 vs. 6.90% this year), while four-year public partners saw a sizable swing from 2020 (-4.68% vs. 7.02%).

Conclusion

Although the ongoing pandemic has continued to affect enrollment across the board, higher education institutions using advanced analytics have an advantage that positively impacts their enrollment, deposit, and melt trends. Despite COVID-19 remaining a threat to the 2021 enrollment cycle, Othot partners fared significantly better overall.

Partner institution enrollment increased 7.02%, while non-partners saw a 2.60% decrease. Additionally, Othot partners saw an almost 10.00% increase in public school deposits in May 2021. Its private school partners experienced an increase greater than 15.00% in April, and an almost 24.00% increase in May 2021, offsetting the decrease in enrollment experienced throughout 2020.

While new challenges will emerge as higher education adapts to the "new normal" created by the pandemic, institutions using data and analytics to make informed decisions have the leeway, confidence, and insights to push limits, achieve enrollment objectives, and provide students with the support needed to achieve their educational goals.

Definitions, Methods and Notes

For the purpose of the *2021 Enrollment Pulse Report*, we measure Fall 2021 enrollment as the number of deposits for first-time, full-time students. Summer melt is measured by the number of canceled deposits from the population that deposited as of July 1. This data is compiled from dozens of Othot partner institutions located in the United States that have been engaged with Othot for more than one year that were focusing on improving enrollment. Data is segmented by institution type, public and private institutions. Among privates, this data only is for non-profit institutions.

The findings in the *2021 Enrollment Trends Pulse Report* are aggregated and anonymous and an accurate representation at the time of analysis. The findings may also reflect our partner's mitigation actions, such as reducing tuition and other methods.



About Othot, LLC

Othot, a Liaison company, is a leader in artificial intelligence and prescriptive analytics for higher education institutions across the United States. Together, Othot and its partner schools focus on each institution's specific enrollment, student success, and advancement goals. Othot's cloud-based solution provides continuous intelligence in real time and empowers schools to engage with each prospective, current, and former student with the right tactic at the right time.

For more information or to schedule a demo of the Othot Platform, please contact us at othotteam@othot.com or visit our website at othot.com.

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