

Summary Findings  
*Survey of Higher Education  
Enrollment and Admissions Officers*

February 2021



# Summary of key findings

## Admissions policy landscape and outlook:

- Following several years of a more gradual trend towards test-optional, the four-year institution admissions policy landscape has shifted towards test-optional policies after the onset of the COVID-19 pandemic
- Most institutions that adopted test-optional policies as a result of COVID-19 did not anticipate making policy changes prior to 2020 and have adopted temporary or pilot policies; these institutions indicate being somewhat unlikely to return to test-required, with significant uncertainty remaining. Institutions that adopted test-optional policies prior to COVID-19 are highly unlikely to return to test-required
- Institutions of all types of admissions policies are unlikely to become test-blind, citing that students should be allowed to choose to submit test scores and that test score data is too useful to abandon altogether

## COVID-19 impact on admissions processes:

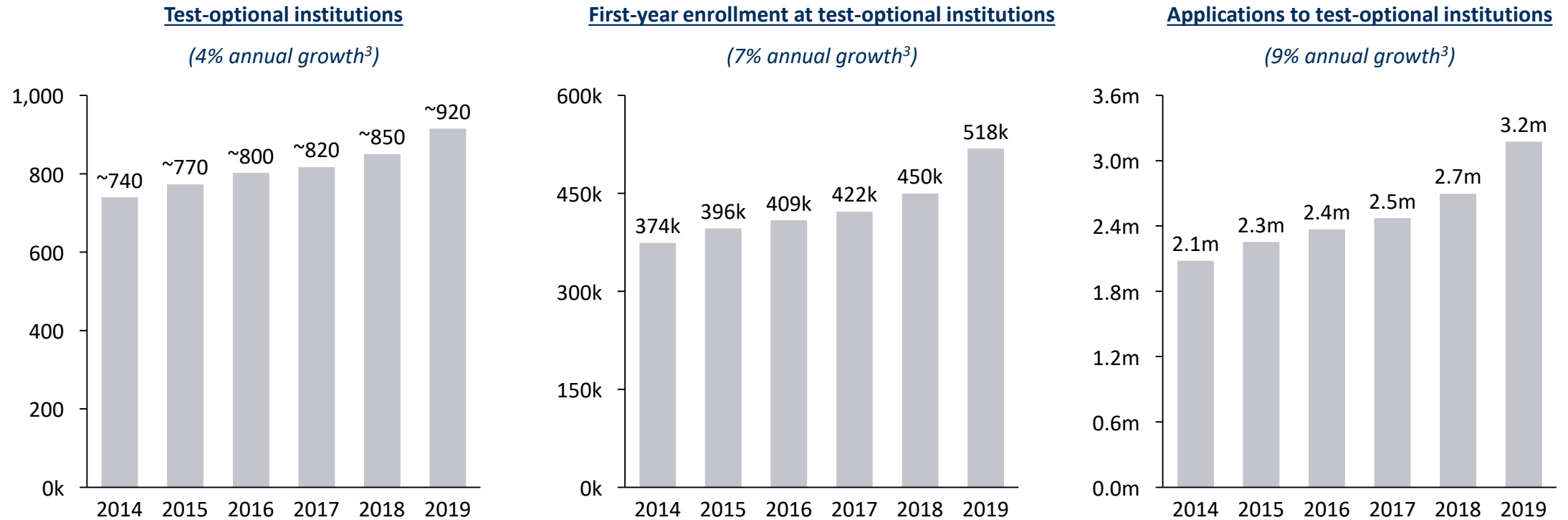
- COVID-19 has differentially affected application volume across the higher education landscape depending on institutional profile, with selective institutions largely observing increases in applications, and less selective institutions experiencing more mixed results
- Even as many four-year institutions become test-optional, most still report significant use of testing data throughout the enrollment process; COVID-19 has impacted the percentage of students submitting test scores (with test-optional institutions reporting a 20-30% decrease in students submitting scores); many institutions note that this reduction in data has led to increased difficulty in some parts of their candidate evaluation process, with the most pronounced pain point related to awarding merit scholarships
- As admissions decision makers at four-year institutions look to the future, most anticipate that sourcing students and ensuring student success and retention will present the greatest challenges in the enrollment process



# Admissions policy landscape and outlook

# Over the past several years, there has been an increasing trend towards test-optional admissions policies at four-year institutions

Recent growth in test-optional policies<sup>1</sup> (2014-2019; four-year or above institutions<sup>2</sup>)



Historical adoption of test-optional policies has been more pronounced among smaller private institutions, particularly in the Northeast and on the West coast, with ~45% of 4-year institutions becoming test-optional by Fall 2019

In Fall 2019, institutions with test-optional policies accounted for ~30% of first-year enrollment. Historically, only a proportion (est. ~30%) of first-years at test-optional institutions enroll without providing a test

1. Refers to institutions identified as "test-optional" by FairTest, which includes institutions that are "test optional," "test flexible" or otherwise de-emphasize the use of standardized tests by making admissions decisions -- without using ACT or SAT scores -- for all or many applicants who recently graduated from U.S. high schools.  
 2. Out of ~2.3k total four-year institutions in IPEDS, includes only institutions that A) report some undergraduate enrollment for 2019 and B) report application and admissions data in IPEDS; there are ~235 private institutions and ~20 public institutions without enrollment in IPEDS, while the ~200 institutions that do not report application or first-year enrollment data account for less than 10% of total UG enrollment  
 3. Annual growth is calculated in terms of a compound annual growth rate (CAGR)  
 Source: IPEDS; FairTest; EY-Parthenon Analysis



# Due in large part to the impact of COVID-19, four-year higher education institutions have shifted towards being predominantly test-optional

## Perspectives

Approximately 50% of four-year institutions had adopted test-optional policies<sup>1</sup> prior to COVID-19

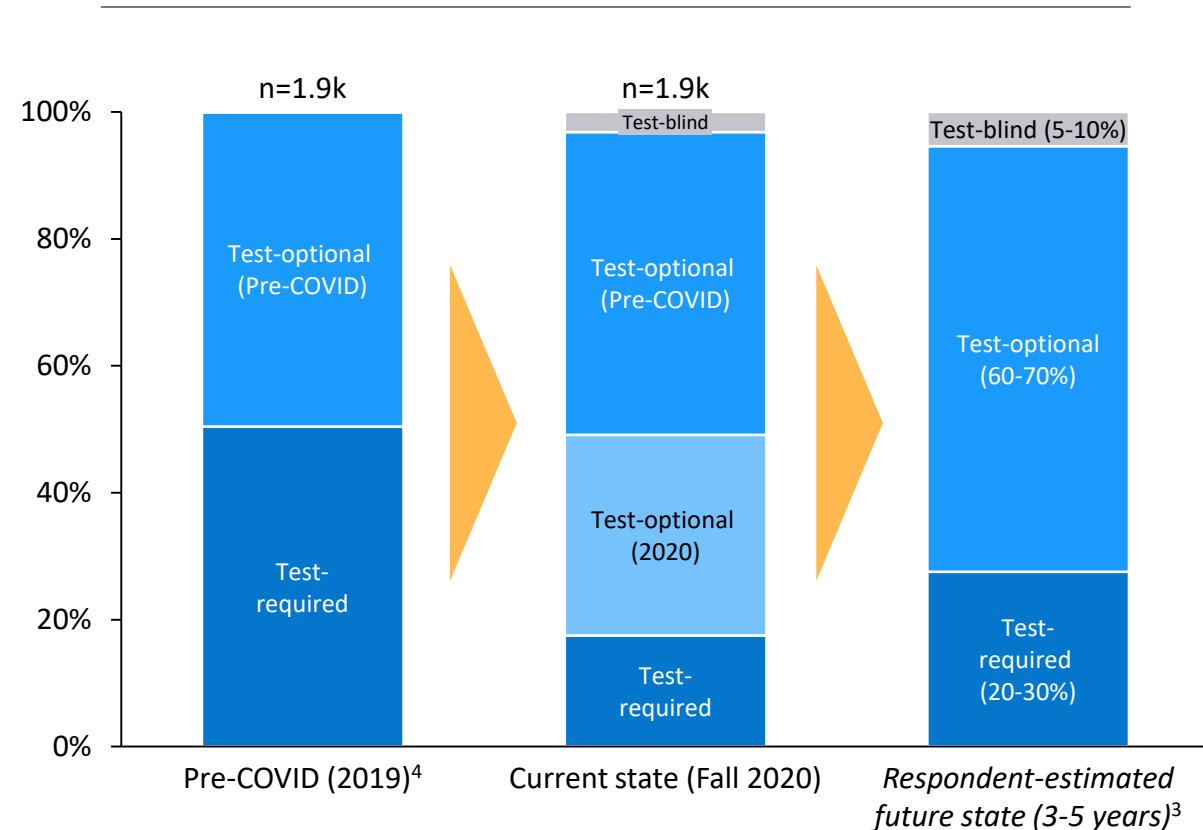
An additional 30% of four-year institutions transitioned to test-optional<sup>1</sup> in some form during 2020

- Admissions policies at these “COVID-driven” test-optional institutions range from permanent changes to pilot programs lasting 1-5 years

The next few application cycles will be critical in informing how decision makers choose to proceed with admissions policies in the long-term

- Future policy decisions of “COVID-driven” test-optional institutions are likely to depend on the ability to successfully yield, support, and retain students without the use or availability of testing data
- Despite the increasing prevalence of test-optional policies, institutions appear unlikely to adopt test-blind at a significant rate

Percentage of institutions by admissions testing policy over time  
(Four-year or above institutions<sup>2</sup>)



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3. Applies landscape estimates from n=207 survey respondents to the current higher education landscape to derive estimated future state

4. The only 4-year institution officially test-blind prior to 2019 was Hampshire College. Sarah Lawrence College was test-blind previously, but changed to test-optional in 2012.

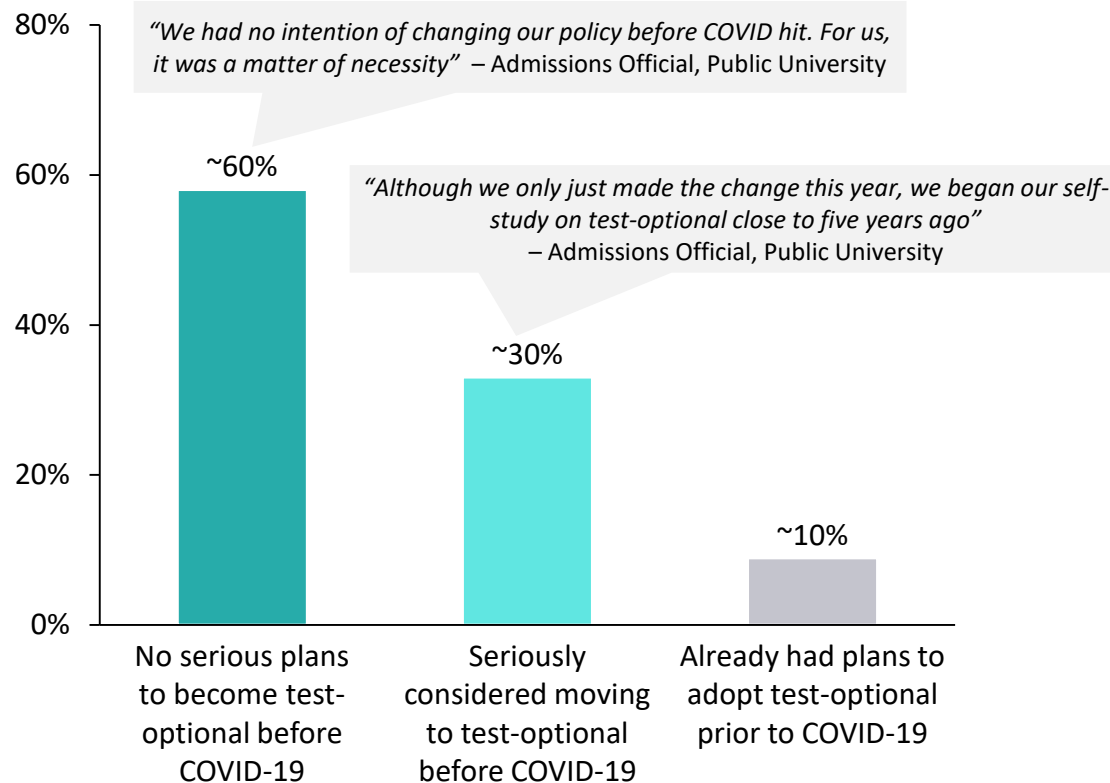
Source: FairTest; IPEDS; EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207); EY-Parthenon Interviews

# Most COVID-driven test-optional institutions did not anticipate making policy changes prior to 2020; most abruptly adopted temporary policies

## COVID-driven test-optional: Consideration of test-optional policies prior to COVID-19



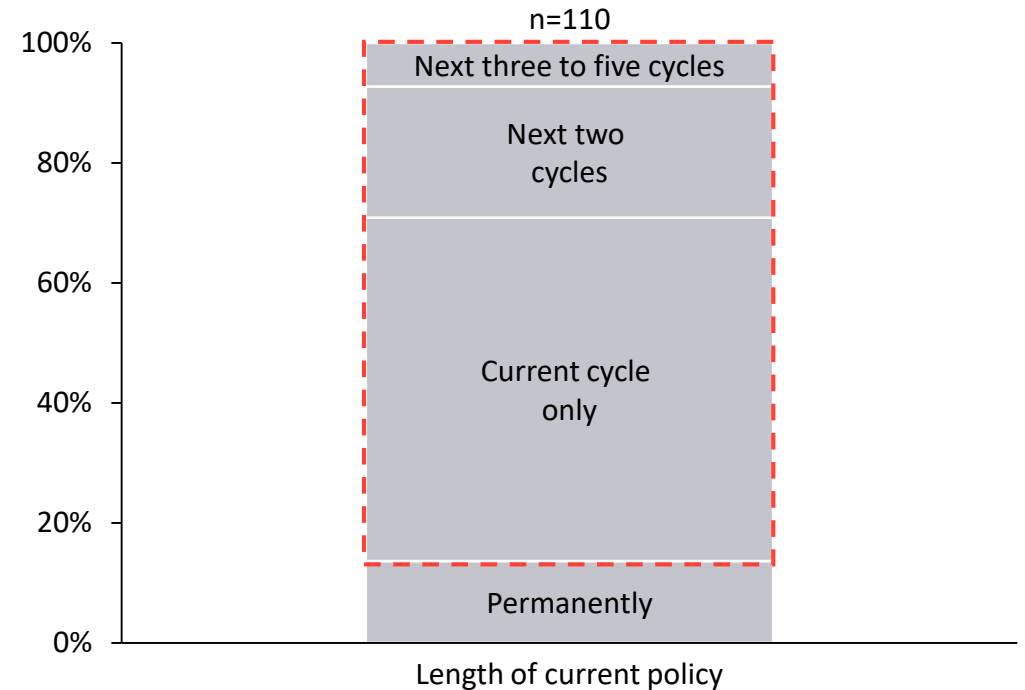
“You noted that your institution adopted a test-optional policy for the current application cycle during COVID-19. Was your institution's decision to move test-optional primarily a result of the ramifications of COVID-19?”



## COVID-driven test-optional: Duration of current policy



“As of the current moment, how long is your institution's test-optional policy officially in place?”



= Temporary or pilot policy (~85% of respondents)



# Test-optional institutions are unlikely to return to test-required, although COVID-driven institutions note uncertainty in determining future policies

## Perspectives

**Many institutions have implemented test-optional policies without encountering significant pain points, particularly those that became test-optional prior to COVID-19**

“ We did years of research and went around to every group of stakeholders to build up consensus on campus. Over time, we have found that you can still make selective admissions decisions and protect admission and yield profiles while being test-optional”

Admissions Official, Private University

**For COVID-driven test-optional institutions, data from the next few years will be critical to understanding whether test-optional policies are tenable...**

“ We, along with our faculty, are watching our results for this year closely. We feel good, but we may balk at the results and go right back to requiring tests”

Admissions Official, Public University

**... and these institutions will be closely watching peers and large systems to see how the post-COVID period transpires**

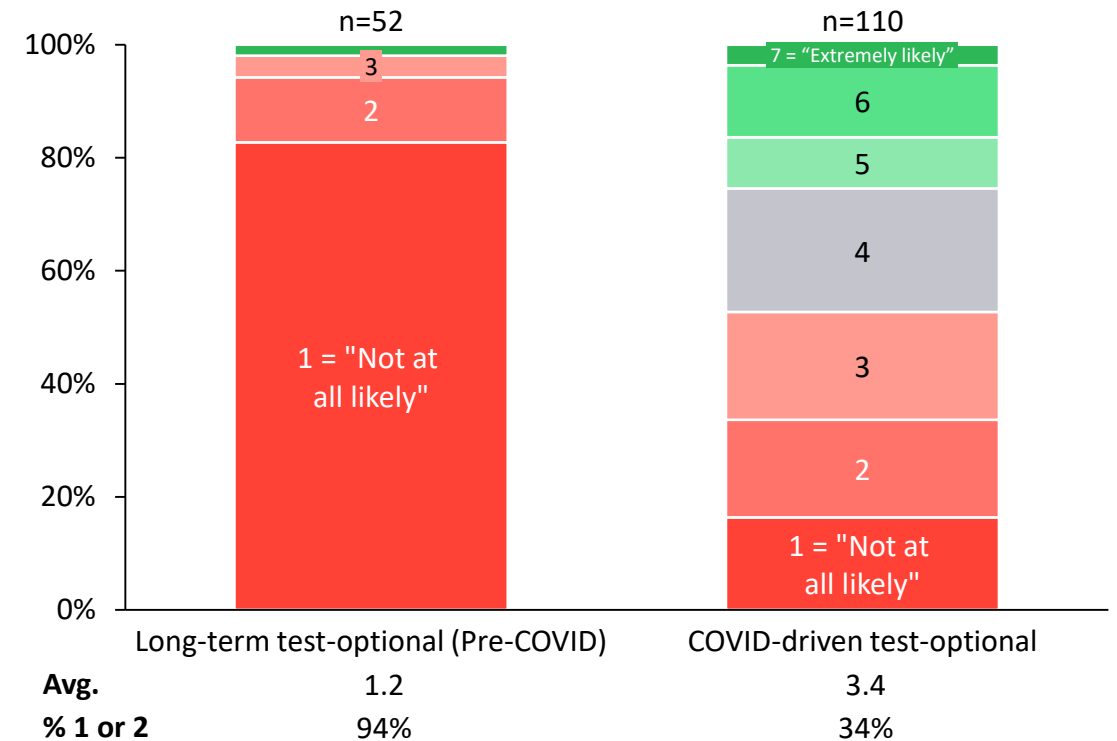
“ We have been consulting with schools across the [athletic conference]. There is lots of inertia, and similar schools are likely to make these types of moves together”

Admissions Official, Public University

### Test-optional institutions: Likelihood to return to test-required



“In the next 3-5 years, how likely is your institution to move to a test-required admissions policy? Please rate your answer on a scale of 1 to 7, where 1 = ‘Not at all likely’ and 7= ‘Extremely likely’.”

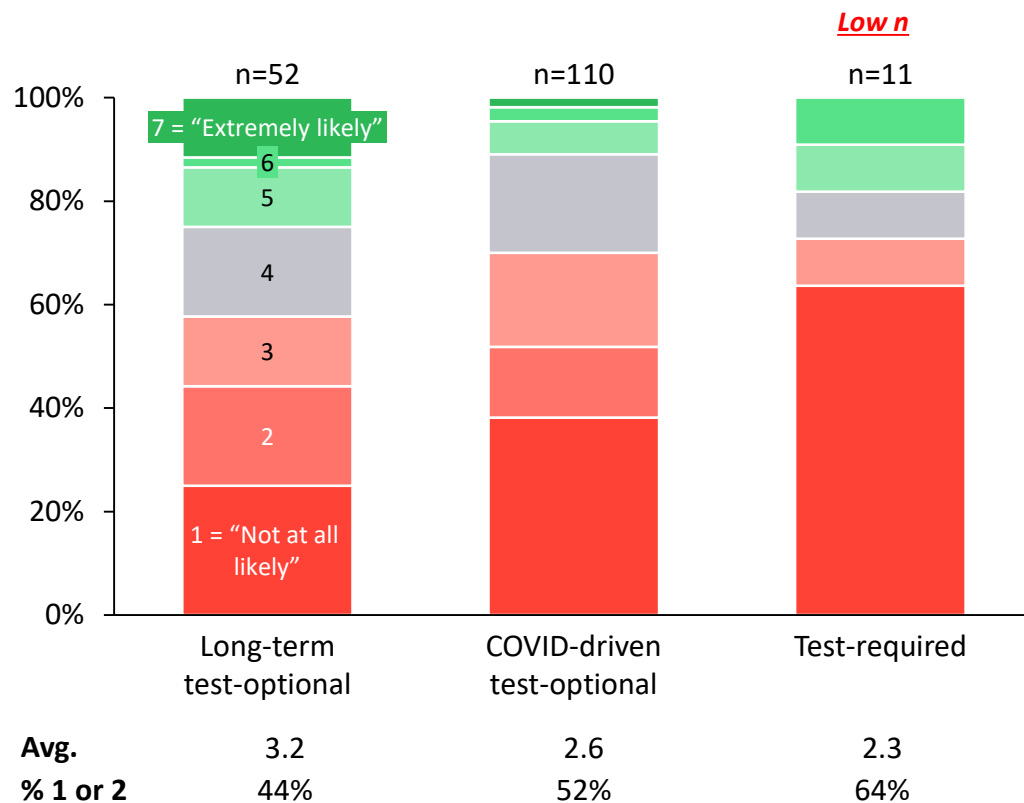


# Institutions are unlikely to move test-blind, noting that students should be able to choose whether to submit, and that scores are too useful to abandon

## Likelihood to adopt test-blind admissions policies



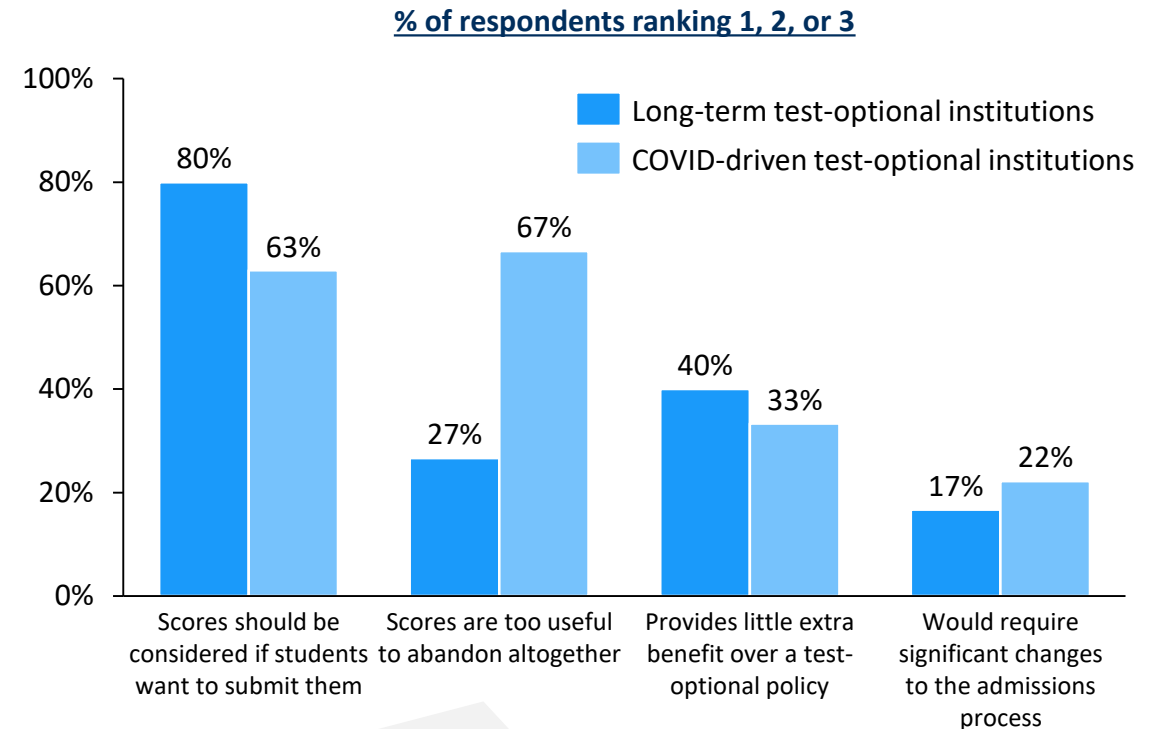
"In the next 3-5 years, how likely is your institution to move to a test-blind admissions policy? Please answer on a scale of 1 to 7, where 1 = 'Not at all likely' and 7 = 'Extremely likely'."



## Reasons unlikely to adopt test-blind<sup>1</sup>



"You selected that your institution is not likely to adopt a test-blind policy. Which of the following best describes the reasons that adoption of a test-blind policy is unlikely for your institution? Please rank at least 1, and up to 3 reasons."



A much higher percentage of COVID-driven test-optional institutions also ranked "scores are too useful to abandon" as #1 (~50%) than long-term / pre-COVID test-optional institutions (~15%)



1. Survey question was only asked of respondents who selected 1, 2, or 3 in terms of likelihood to move test-blind  
Source: EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207)



# COVID-19 impact on admissions processes

# Selective institutions are largely observing application increases during COVID-19, while less selective institutions have experienced mixed results

## Perspectives

**During COVID-19, many highly selective institutions have observed early application growth**

“It has been pretty well-documented, the increase in applications that some of our really selective peers have seen. There has been a bump this year of students taking a shot who may not have applied to those schools before”

Admissions Official, Private University

**However, the rest of the sector has experienced more volatility in application volumes as a result of heightened uncertainty during the pandemic**

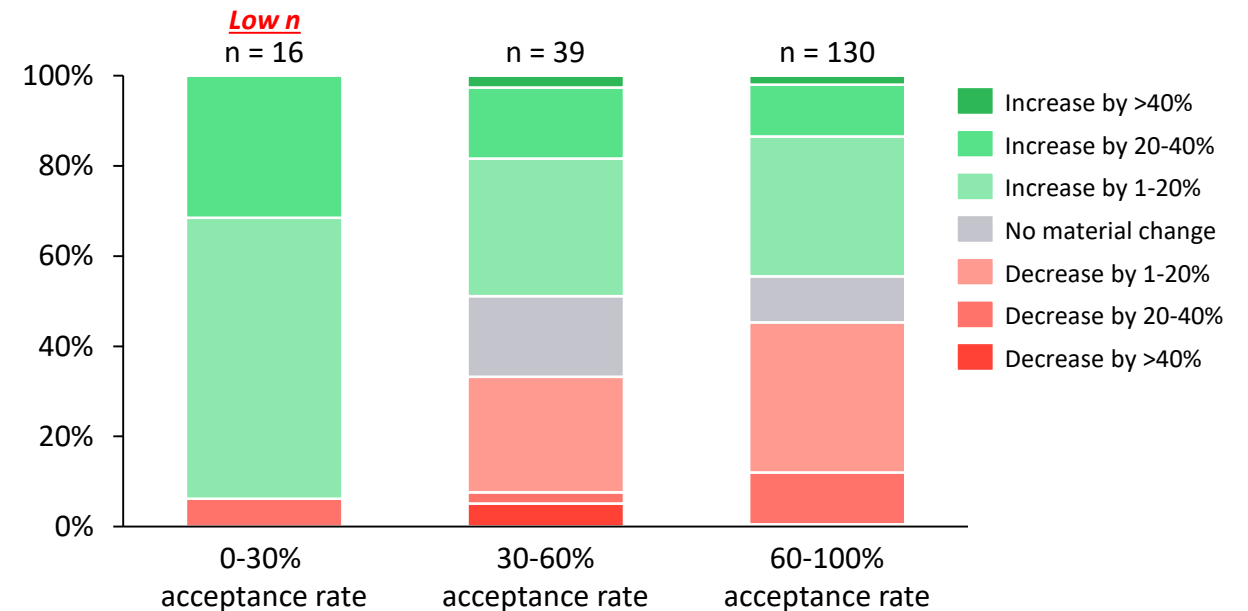
“It is hard to say what impact COVID will have had on us and our applications by year’s end. Our applicant numbers seem on track, but we don’t know if the same number or types of students will yield or eventually matriculate”

Admissions Official, Public University

### COVID-19 impact: Application volume relative to typical cycle by institutional acceptance rate<sup>1</sup>



“Compared to the typical pre-COVID admissions cycle, how has application volume changed at your institution, if at all, during the current application cycle? Please estimate to the best of your knowledge, informed by the most recent available data.”



% reporting decrease

6%

33%

45%

% of 4-year institutions

~5%

~20%

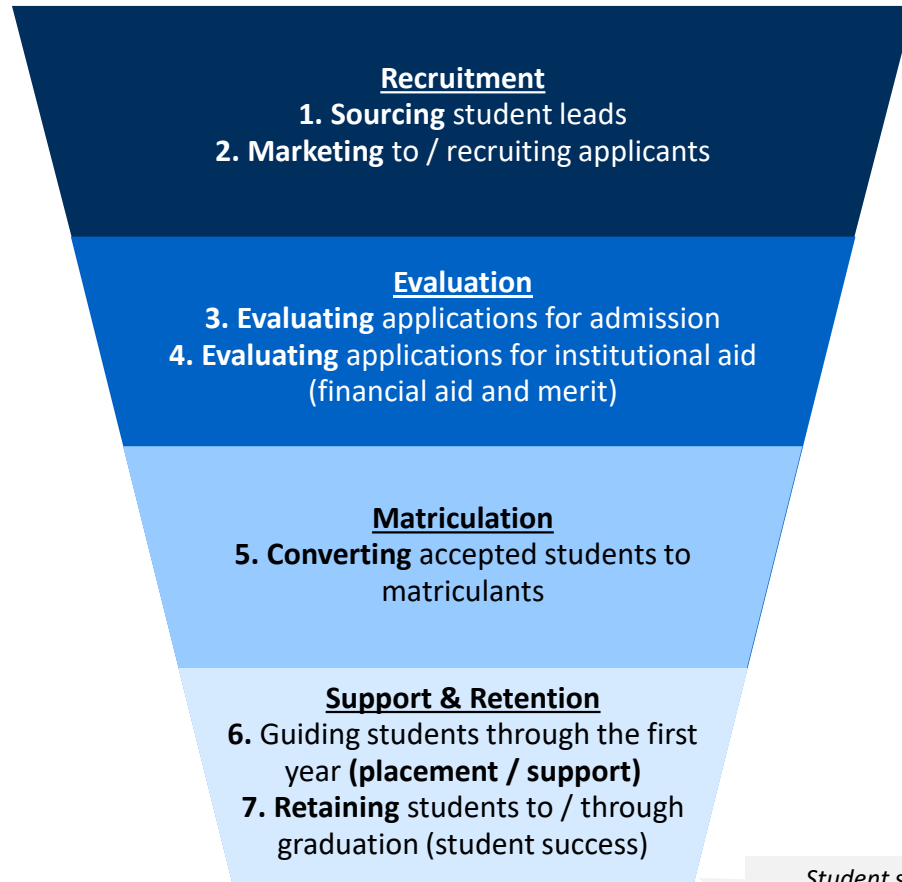
~75%

1. Excludes respondents that answered “I don’t know”  
Source: EY-Parthenon Interviews; EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207)



# Four-year higher education institutions typically use data from test providers throughout in the entire admissions and enrollment process

## Admissions and enrollment process overview



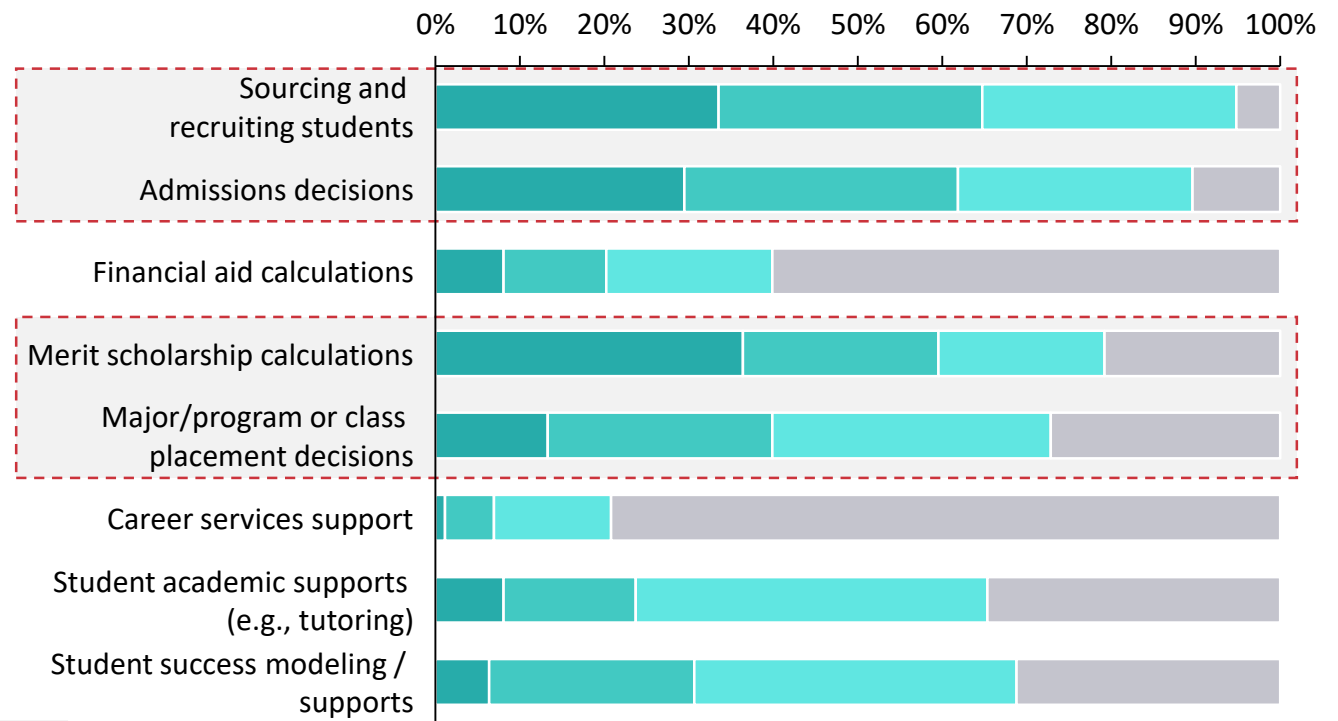
*Student success and retention considerations often guide decisions throughout the funnel*

## Uses of standardized tests in the admissions and enrollment process<sup>1</sup>



"Please indicate the extent to which standardized test scores (SAT or ACT) are used to inform any of the following decisions or analyses related to the student lifecycle at your institution."

Considerable degree Moderate degree Some degree Not used at all



1. Excludes respondents at test-blind institutions  
Source: EY-Parthenon Interviews; EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207)

# Student submission of test scores fell in the current cycle, likely as a result of both an accelerated move to test-optional and students' access to tests

## Perspectives

**Prior to COVID-19, most applicants still submitted test scores and data to test-optional institutions**

“ We have been test-optional for [several years] at this point, and we still usually get upwards of 50-60% of students submitting scores, although that has fallen this year”

Admissions Official, Private University

**During COVID-19, institutions have grappled with a significant decline in availability of student data due to test accessibility issues and admissions policy changes**

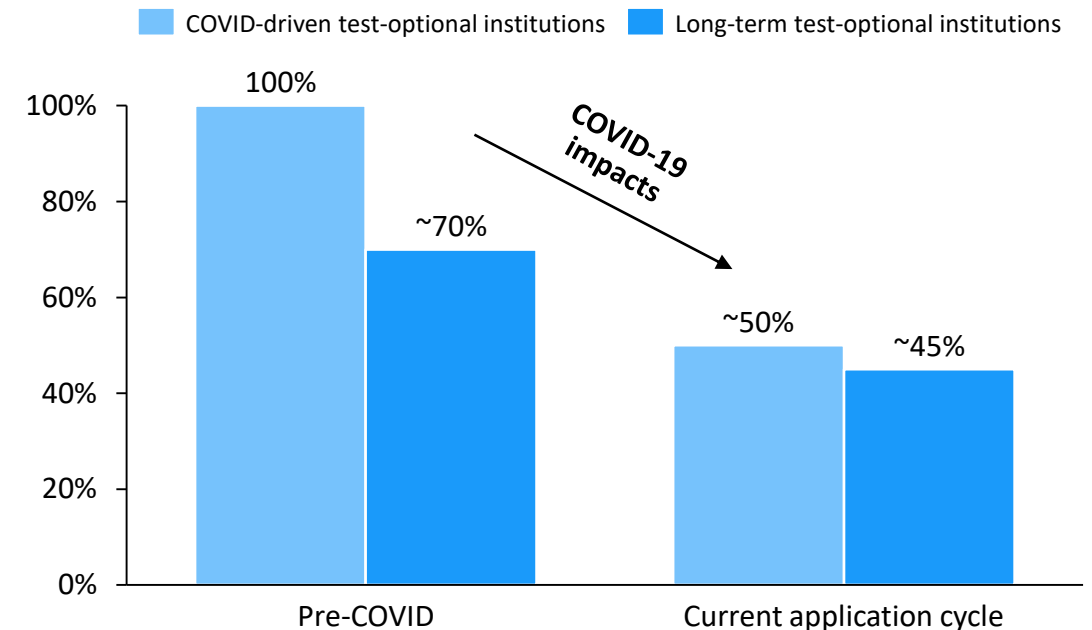
“ COVID-19 has caused headaches like never before. We are used to having SAT or ACT scores for all our students, and now we are making the same decisions with only half of the data we would ideally have”

Admissions Official, Public University

### COVID-19 impact: Share of applicants submitting test scores to test-optional institutions<sup>1</sup>



“In a typical application cycle pre-COVID-19, what percentage of applicants to your institution would submit standardized test scores (SAT or ACT) as part of their application? What percentage of applicants have submitted or are likely to submit standardized test scores during this application cycle?”



1. Excludes respondents that answered “I don't know”  
Source: EY-Parthenon Interviews; EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207)



# Institutions that transitioned to test-optional during COVID-19 have experienced difficulty adjusting some admissions and enrollment functions

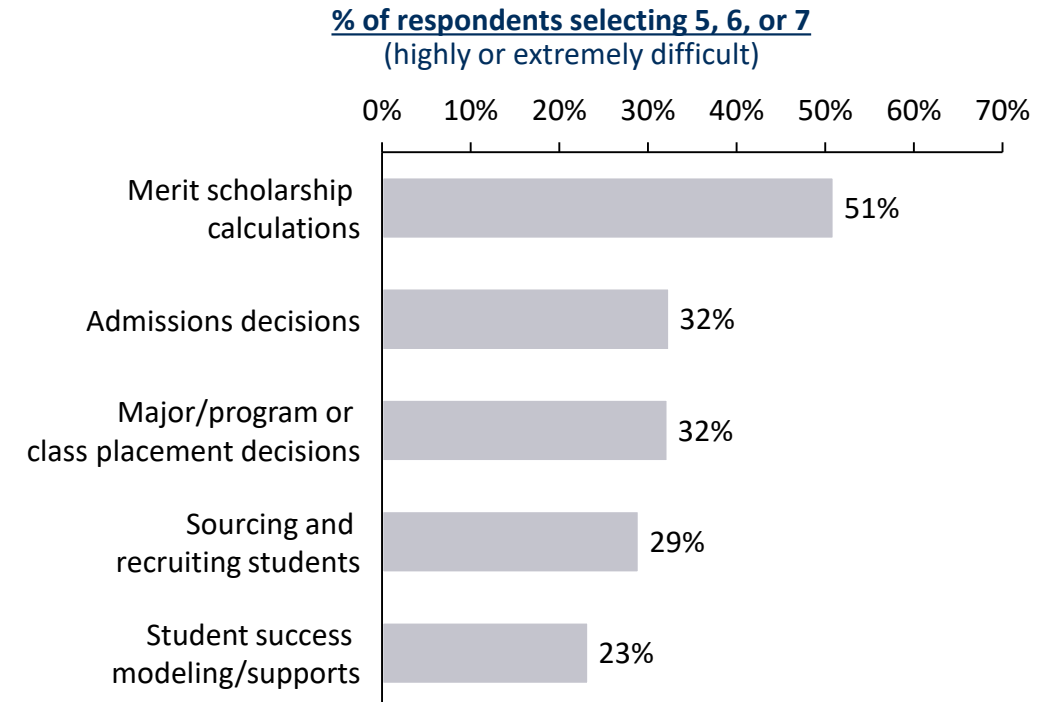
## Perspectives

- **Merit scholarship calculations:** Many institutions (and state scholarship programs) include test scores as one of a few core criteria for awarding merit aid, thus requiring significant adjustments to these processes during the adjustment to test-optional
- **Admissions decisions:** Reliance on less standardized (e.g., high school GPA) and more qualitative (e.g., essays) data has introduced issues of objective comparison as well as led to longer review times at some institutions
- **Placement decisions:** Specialized programs, (e.g., Nursing, Business) have often used test scores to indicate a base level of competency, and thus test-optional institutions may be required to turn to alternative analyses of existing transcript information to gather similar data
- **Sourcing and recruiting students:** Institutions often use testing data at the beginning of the recruiting funnel to identify and market to target populations of students; declines in testing volume have forced many institutions to adjust these “tried and true” recruitment formulas
- **Student success and support:** Standardized test scores are an effective and reliable predictor of first-year GPA and retention; without substantial testing data available, institutions have had to adjust predictive models to account for the lack of a key variable

### COVID-driven test-optional: Top 5 areas of difficulty in adjusting to test-optional<sup>1</sup>



“Following your institution's transition to a test-optional admissions policy, how difficult was it to adjust the following analyses / evaluations? Please answer on a scale of 1 to 7, where 1 = “Not at all difficult” and 7 = “Extremely difficult”.”



1. Excludes respondents that answered “I don't know”  
Source: EY-Parthenon Interviews; EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207)

# As admissions decision makers look to the future, most anticipate challenges in sourcing students and ensuring student success

## Perspectives

### Institutions expect challenges related to sourcing and recruiting students to increase amidst demographic challenges and rising competition

“ We are facing a continued decline in our demographics in the region, and we have to increasingly work beyond our borders. We need so many applicants to yield our student body, and getting those applicants is going to be a challenge when every other school needs them too”

Admissions Official, Private University

### Retaining students once they arrive on campus is also top-of-mind for many decision makers as a key priority

“ We are laser-focused on improving our retention rates. Lots of our recent initiatives have been aimed at setting students up for success as soon as they get on campus- asking them why they are here, identifying what they might struggle with, and more”

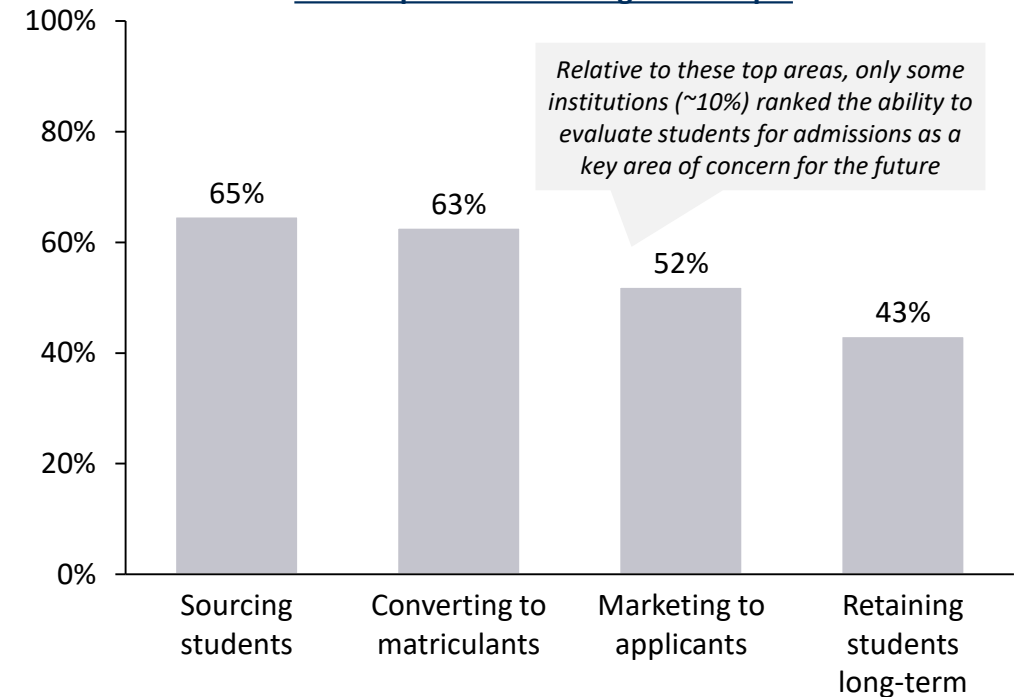
Admissions Official, Public University

### Anticipated most challenging areas of the admissions process (top 4)



“Over the course of the next 3 to 5 years, which of the following areas of the admissions process and student lifecycle are likely to present the greatest challenges to your institution? Please rank at least 1, and up to 3 areas.”

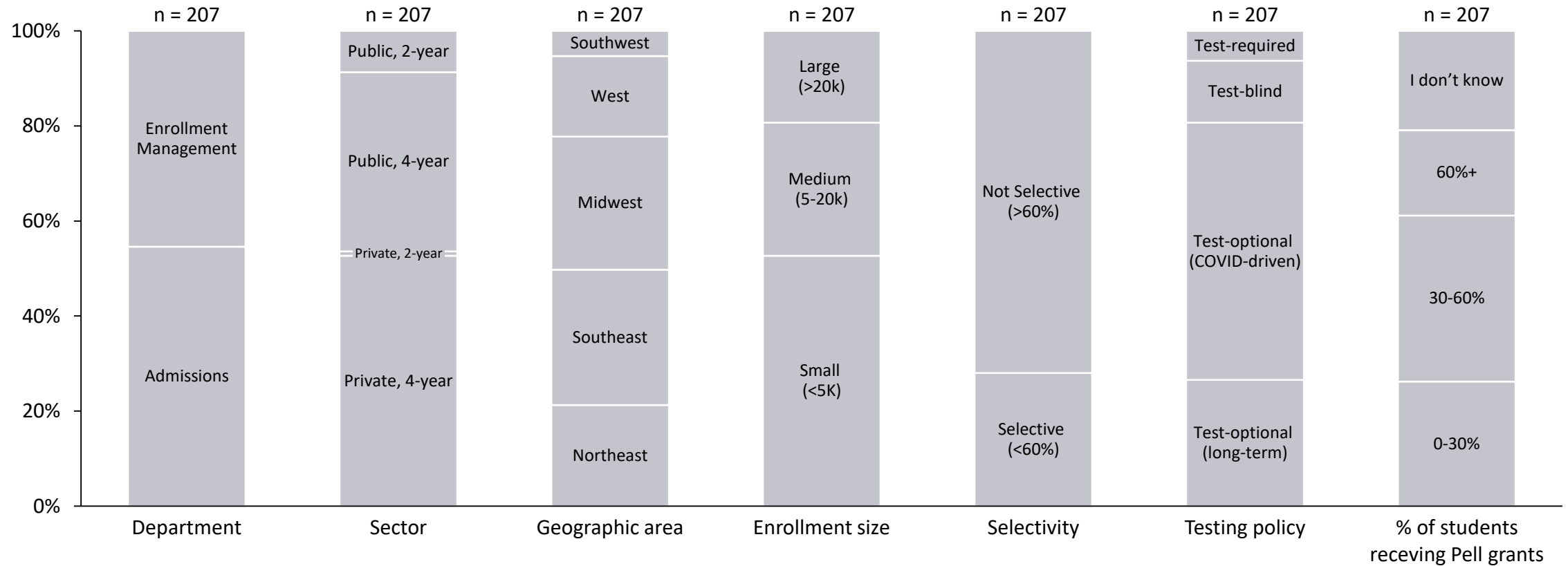
### % of respondents ranking in the top 3



# Appendix

# Higher education decision maker survey demographics

EY-Parthenon Higher Ed Admissions Decision Maker Survey (n=207)





**ACT**<sup>®</sup>