September 2022

COVID-19
TRANSFER, MOBILITY, AND PROGRESS

First Two Years of the Pandemic Report

National Student Clearinghouse™
Research Center™

COVID-19 Transfer, Mobility, and Progress

First Two Years of the Pandemic Report

The *COVID-19 Transfer, Mobility, and Progress* report series aims to identify the ways in which the pandemic is changing transfer pathways across higher education. The pandemic's impacts on transfer enrollment shifted as the pandemic progressed, with transfer pathways and student groups showing diverging patterns over time. As the ninth issue in the series, this report summarizes notable changes in transfer enrollment and persistence post-transfer over a two-year period, with results broken out by academic year, student characteristics, and institution type and selectivity. In addition to the minority-serving institutions analyzed in previous editions, such as Historically Black Colleges and Universities (HBCUs) and Hispanic-Serving Institutions (HSIs), this report offers a new analysis of Rural-Serving Institutions (RSIs) to gain insight to how transfer pathways were impacted in rural communities over the last two years.

The analysis of RSIs unpacks the broad category of four-year institutions to provide deeper understanding of the sharp decline in upward transfers and the stabilization in lateral transfers between four-year institutions—two notable trends in the second year of the pandemic.

The findings in this report are based on a fixed panel of institutions representing 89.9 percent of the Clearinghouse universe of institutions, where over 13 million undergraduate students were enrolled, including 2 million transfer students, during the 2021-22 academic year as of June, 2022. Throughout the report, *pandemic year 1* refers to academic year 2020-21 and *pandemic year 2* refers to academic year 2021-22 whereas academic year 2019-20 is referred to as *pre-pandemic year*.

HIGHLIGHTS

- Higher education experienced a total two-year loss of 296,200 transfer students, or 13.5 percent (nearly 200,000 fewer, or -9.1%, in year 1 and an additional -97,200, or -4.9%, in year 2). All transfer pathways were impacted. Transfer pathways into two-year institutions (reverse transfer and two-year lateral transfer) experienced double-digit rate declines (-21.3% or -113,300 in lateral transfer; -18.0% or -66,900 in reverse transfer). Transfers to four-year institutions also experienced steep declines (-9.7% or -86,000 in upward transfer; -7.6% or -29,900 in lateral transfer).
- The student persistence rate one term after transferring declined across the board and remained below pre-pandemic levels. Year 2, however, showed signs of recovery among younger students (20 or younger), men, bachelor's degree-seeking students, and at private nonprofit four-year institutions.
- Students over age 20 suffered steeper declines, accounting for 85 percent of the total two-year decline in transfer enrollment. These students declined at more than twice the rate of younger students (-16.2% vs. -7.2% for those 20 or younger). Younger students made up 30 percent of transfer enrollment overall.
- White, Black, and Native American transfer enrollments all declined precipitously over the last two years (-163,100, -16.4%; -54,800, -16.4%; -3,100, -15.6%, respectively). For Latinx students, lateral four-year transfers increased but upward transfers declined, and their persistence rates post-transfer declined.
- The pandemic had differential impacts on transfer for institutions serving specific populations of students. Rural-Serving Institutions (RSIs) did not fall as sharply as Non-RSIs (-51,900, -11.1% vs. -225,800, -15.4%, respectively). HSIs suffered far steeper transfer enrollment declines than HBCUs (-102,400, -16.9% vs. -1,000, -4.2%, respectively).

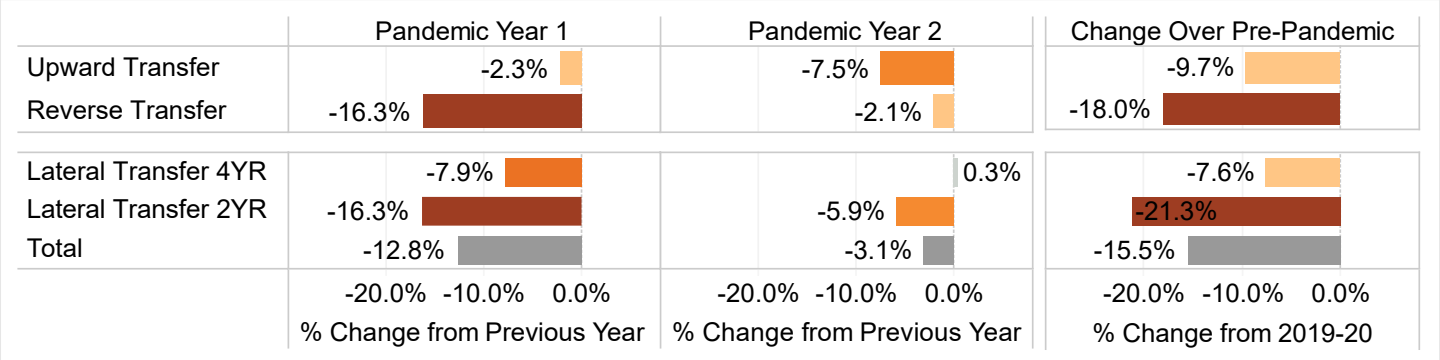
SECTION 1. OVERVIEW OF IMPACTED TRANSFER PATHWAYS

After two years of the pandemic, transfer enrollment declined 13.5 percent overall (-296,200), falling two times more steeply than non-transfer enrollment (-6.3%, -590,600). The decline was more pronounced during pandemic year 1 (-9.1%, -198,900). All transfer pathways were affected, ending year 2 below pre-pandemic levels.

During pandemic year 1, among continuing and retuning (non-freshmen) students, transfer enrollment fell more than non-transfer enrollment (-198,900, -9.1% vs. -193,400, -2.1% respectively). The decline continued into pandemic year 2, when transfer enrollment fell an additional 4.9 percent (-97,200), while non-transfer enrollment declined by 4.3 percent (-397,200). These declines played out differently, however, for Rural-Serving Institutions (RSIs), Historically Black Colleges and Universities (HBCUs), and Hispanic-Serving Institutions (HSIs; see Section 4 for further details).

Lateral and reverse transfers experienced a total two-year decline of 15.5 percent (-143,200) and 18.0 percent (-66,900), respectively, while upward transfers fell -9.7 (-86,000). The two-year total declines for both lateral and reverse transfer were mostly attributable to the initial shock of the pandemic in year 1 (see Figure 1).

Figure 1. Transfer trends shifted in pandemic year 2 by the steep decline in upward transfer and the stabilization in lateral transfer at four-year institutions.



Following the smallest decrease of any pathway in pandemic year 1 (-20,400, -2.3%), upward transfer led the declines in year 2 (-65,600, -7.5%). Declines were felt even at highly selective institutions.

Upward transfers at public four-year institutions declined 9.1 percent since the pandemic started (-55,000), while private four-year institutions (nonprofit and for-profit) saw declines of over 10 percent (-22,100, -10.6% and -8,900, -11.3%; see Appendix). These decreases can be attributed mostly to large declines pandemic year 2. These were largest at private for-profit four-year institutions (-7,100, -9.3%), followed by private nonprofit four-year and public four-year institutions (-16,700, -8.2% and -41,700, -7.1%, respectively).

Across institution selectivity, upward transfer enrollments are still below pre-pandemic levels except for highly selective institutions (see Methodological Notes for institution selectivity). While all other selectivity categories declined in both years, highly selective colleges maintained their pre-pandemic level of upward transfer enrollment due to the unusual growth in year 1 (+6,200, +8.9%).

Upward transfers with a prior associate degree fell by 10.3 percent (-36,100) over the last two years, and the decline is more pronounced in year 2 (-32,800, -9.4% vs. -3,300, -0.9% in year 1; see Appendix). Upward transfers with no prior associate degree follow a similar pattern over the last two years (-49,900, -9.3%).

In-state upward transfers decreased 12.3 percent (-76,600) since the pandemic started and declined regardless of sector (see Figure 2). Highly selective in-state upward transfers saw declines in pandemic year 2 (-6,800, -10.6%), driven

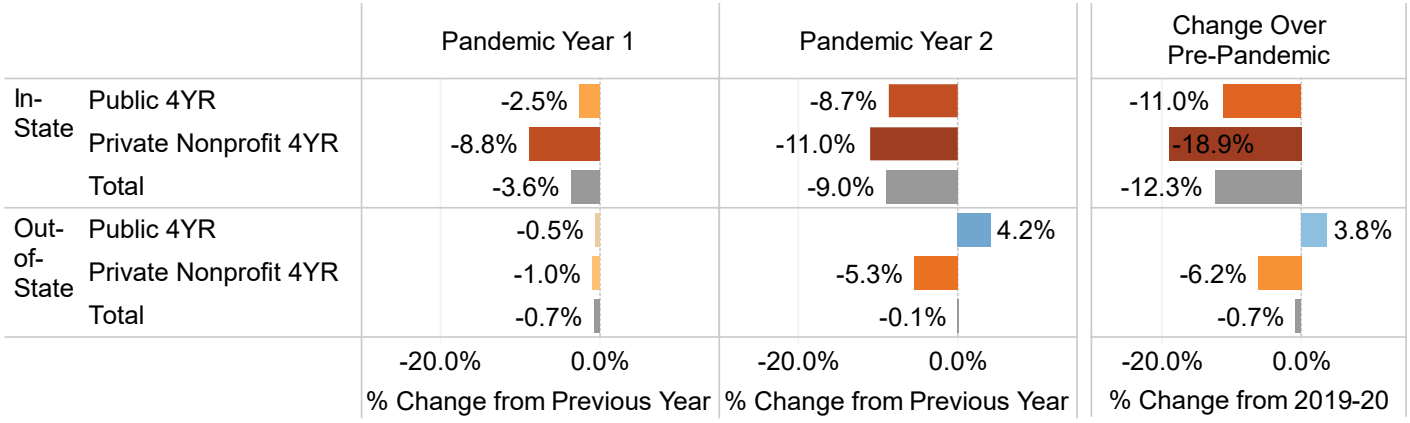
by both public and private nonprofit four-year institutions (-6,000, -10.8% and -800, -9.8%; see Appendix). Out-of-state transfers saw a small two-year decline of 0.7 percent (-1,000), but highly selective institutions increased in both pandemic years (+2,000, +21.6% in year 1; +1,000, +9.1% in year 2). Competitive and less competitive institutions slightly increased only in pandemic year 2 (+400, +0.6% and +100, +0.6%).

At four-year institutions, lateral transfers stabilized in year 2 due to a small rebound in the public sector (+3,100, +1.7%).

Lateral transfers to private for-profit four-year institutions declined the fastest of all sectors over the last two years (-8,700, -14.2%) after experiencing the largest decline of any sector in both years (-7,600, -12.4% in year 1, -1,100, -2.1% in year 2; see Figure 3). Public four-year institutions were the only sector to make gains in year 2 (+3,100, +1.7%). Primarily online four-year institutions (POIs) declined 10.1 percent (-9,600) in lateral transfers since the start of the pandemic. POIs still made up a large share of transfers, with 23.9 percent of the total four-year lateral transfers having enrolled in POIs during the pandemic.

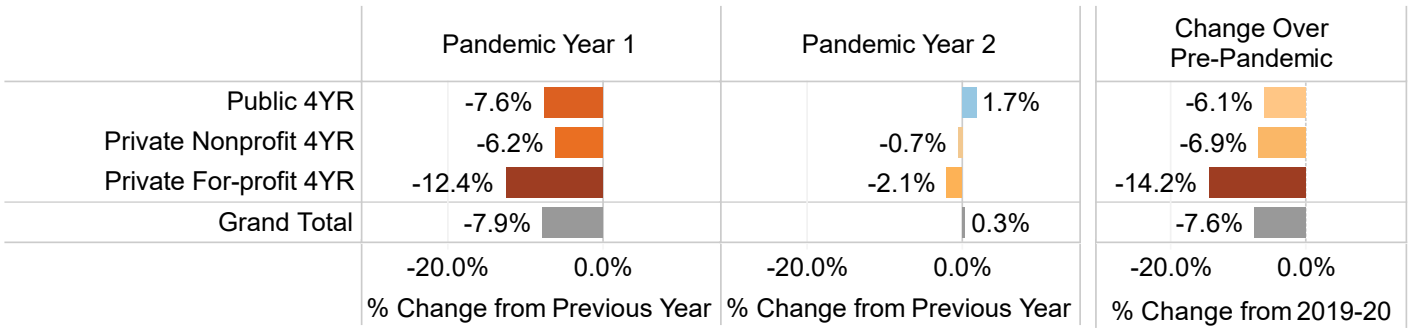
While lateral four-year transfers over a two-year period did not return to pre-pandemic levels regardless of institution selectivity, similar to upward transfers, highly selective institutions experienced gains in pandemic year 1 (+1,200, +3.1%), which were erased in year 2 (-1,600, -4.1%; see Appendix). In contrast, lateral transfers elsewhere increased in year 2 (+200, +2.6% for competitive, +500, +1.7% for less competitive, and +4,200, +3.0% for noncompetitive institutions, respectively).

Figure 2. In-state upward transfer declines accelerated for all sectors in year 2, while the public sector had growth in out-of-state upward transfers.



Note: Figure 2 exlcudes primarily online or multi-state institutions.

Figure 3. Four-year lateral transfers decreased in all sectors, except a small year 2 rebound in the public sector.



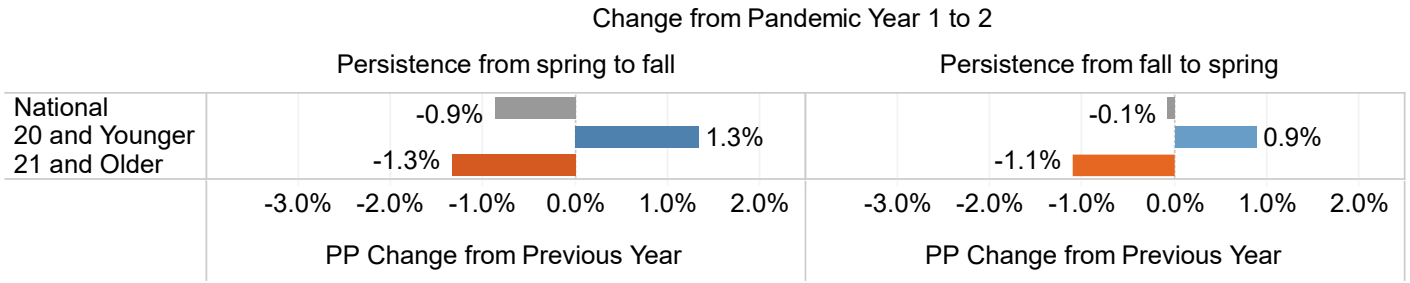
SECTION 2. OVERVIEW OF PERSISTENCE AFTER TRANSFERRING

Persistence rates dropped for transfer students overall, remaining below pre-pandemic levels. However, younger students (20 and younger) fully recovered to pre-pandemic rates in year 2.

During the pandemic, overall post-transfer persistence rates (the subsequent term after transferring) declined nationally from 80.7 percent (pre-pandemic) to 80.4 percent (year 1) to 80.3 percent (year 2) for those transferred in fall term, and from 70.7 percent (pre-pandemic) to 69.8 percent for the spring term transfers (see Appendix).

Only younger students saw persistence rate improvements (20 or younger) in year 2, returning to pre-pandemic levels (from 89.1% pre-pandemic to 88.5% to 89.3% for those transferred in fall term; see Figure 4).

Figure 4. Persistence rates returned to pre-pandemic levels for younger students due to gains in year 2.



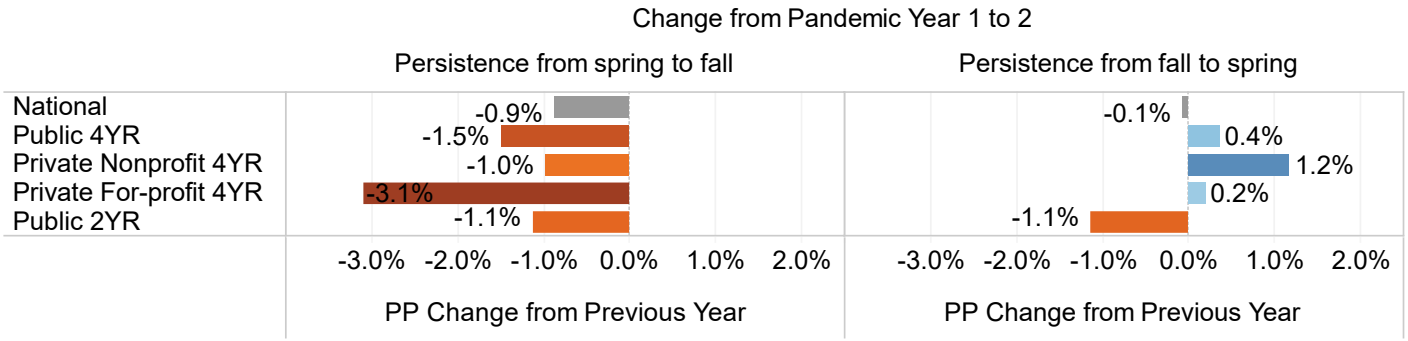
Persistence trends shifted in pandemic year 2, resulting in disproportionate impacts on community colleges, women, and Latinx and Native American transfer students.

In pandemic year 1, persistence rates declined in all institutional sectors. This was reversed in the second half of year 2, with persistence improving or stabilizing everywhere except for community colleges (-1.1 pp in fall 2021; see Figure 5). Fall 2021 persistence rates rebounded for private nonprofit four-year institutions (+1.2 pp) and stabilized for public and private for-profit four-year institutions (+0.4 pp and +0.2 pp, respectively). Students transferring to community colleges experienced the greatest two-year decline in persistence rates (-1.6 pp in fall 2021 over fall 2019) while private nonprofit four-year institutions showed the smallest drop (-0.3 pp in fall 2021 over fall 2019; see Appendix).

Persistence rates declined almost equally for men and women after two years (-0.3 pp and -0.5 pp, respectively, in fall 2021 over fall 2019), but it is notable that persistence among women worsened in year 2 (-1.8 pp in spring 2021 over spring 2020 and -0.3 pp in fall 2021 over fall 2020) while men made small gains (+0.5 pp in spring 2021 and +0.3 pp in fall 2021; see Appendix). This is a reverse of pandemic year 1 where men's persistence rates declined while women's rates remained relatively stable.

Latinx and Native American transfer students experienced two-year declines almost double that of other racial and ethnic groups (-1.0 pp and -1.7 pp, respectively, in fall 2021 over fall 2019; see Appendix). In year 1, persistence rates fell for nearly all groups except for Asian transfers, but starting in the second half of pandemic year 2 the patterns are rather mixed. Fall 2021 persistence rates remained stable for Black students (+0.1 pp), consistent with the trend at HBCUs (see Section 4 for more details), as well as for White students (+0.2 pp) but declined for others, with the largest drop among Latinx and Native American students (-0.7 pp and -0.9 pp, respectively).

Figure 5. Persistence rates rebounded in year 2 for every institutional sector except community colleges.



Sector	Pandemic Year 1		Pandemic Year 2	
	Spring to fall persistence	Fall to spring persistence	Spring to fall persistence	Fall to spring persistence
National	70.7%	80.4%	69.8%	80.3%
Public 4YR	82.9%	89.6%	81.4%	90.0%
Private Nonprofit 4YR	74.6%	81.9%	73.7%	83.1%
Private For-profit 4YR	61.8%	69.4%	58.7%	69.6%
Public 2YR	64.5%	69.5%	63.4%	68.3%

Persistence rates improved in year 2 for bachelor's degree-seeking transfer students, the only credential category to rebound.

Bachelor's degree students had the smallest two-year decline (-0.7 pp for fall term transfers, 2019 to 2021) due to shifting trends in year 2 (see Appendix). Persistence rates declined regardless of credential type during pandemic year 1 with the greatest decline for bachelor's degree students (-1.2 pp in fall 2020). This was reversed in year 2; bachelor's degree students were the only ones to experience gains (+0.6 pp compared to -0.9 pp for all other programs combined in fall 2021). These gains were made among traditional college-aged students (age under 25).

SECTION 3. KEY DIFFERENCES BY STUDENT DEMOGRAPHICS

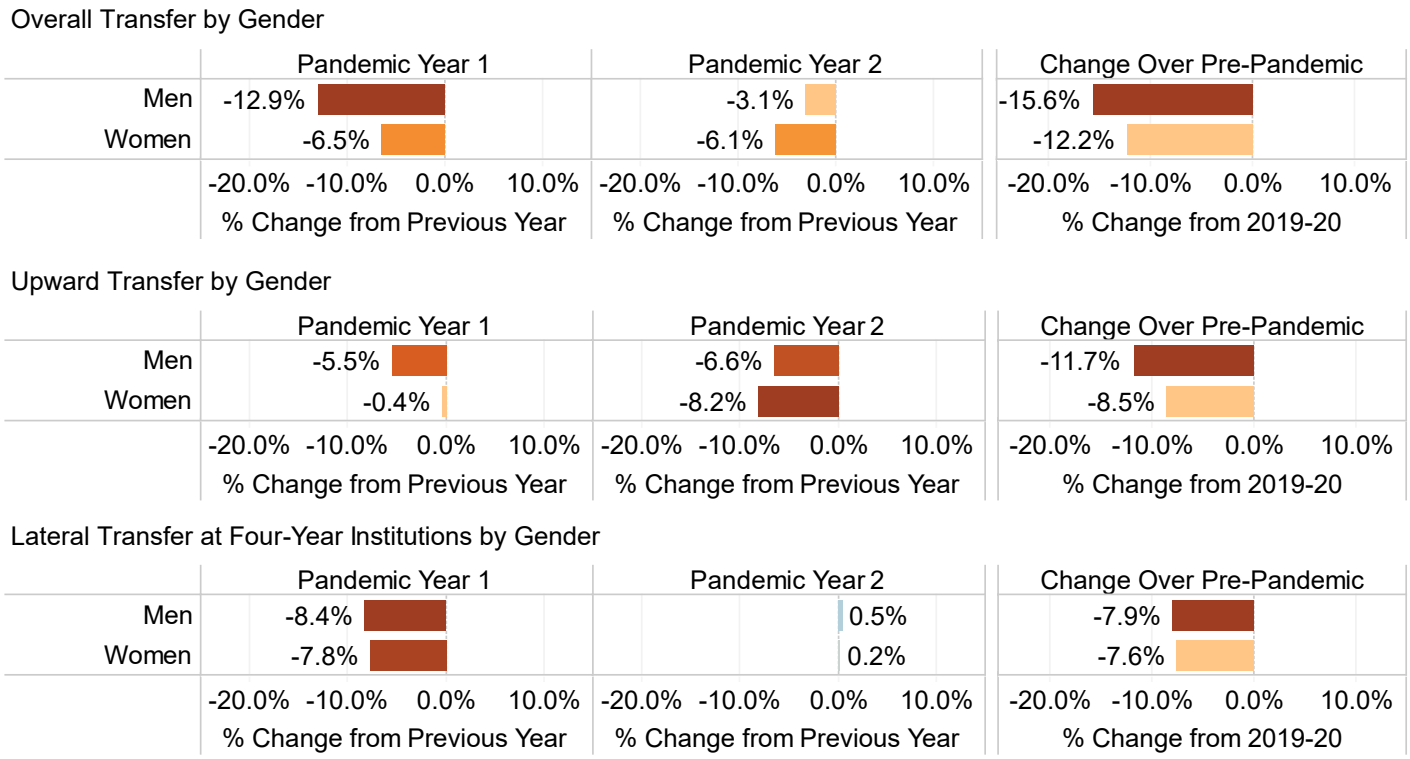
Transfer enrollment and persistence have declined at a higher rate for men than women in pandemic year 1. However, in pandemic year 2, women fell more than men in both areas.

Transfer enrollment decreased by 15.6 percent for men (-139,000) since the pandemic began, a greater rate of decline than women (12.2%, -153,000; see Figure 6). Women's declines worsened in year 2, outpacing men in the rate of decline as well as student counts. In year 1, male transfer enrollment decreased by 12.9 percent (-115,000), nearly double the 6.5 percent decrease for women (-81,000). In year 2, however, female transfer enrollment decreased by 6.1 percent (-153,000) compared to -3.1 percent (-23,000) for males.

Upward transfers also saw a reversal in gender patterns. Male upward transfers declined -11.7 percent (-41,700) from pre-pandemic levels compared to -8.5 percent (-44,000) for women. These changes were uneven during the pandemic. Declines in male upward transfer in pandemic year 1 amounted to losses of 19,600 students (-5.5%) compared to smaller declines for women (-2,000, -0.4%). This was reversed in year 2, where upward transfers decreased more for women (-42,000, -8.2% vs. -22,200, -6.6% for men). This trend does not hold at highly selective institutions, where women fared relatively better, with more gains in year 1 and smaller declines in year 2 compared to men (+3,800, +11.0% vs. +1,800, +5.4% for men in year 1; -2,600, -6.8% vs. -2,800, -8.1% for men in year 2).

There was no clear gender divide in lateral four-year transfer pathways, with nearly the same rates of two-year decline for both (-12,800, -7.9% for men; -17,100, -7.6% for women) and similar decreases in year 1 and stabilization in year 2.

Figure 6. Overall and upward transfer fell more for men than women in year 1, which was reversed in year 2.



Transfer enrollment of students older than 20 declined by 16.2 percent, more than double the younger student decline (-7.2%). They accounted for 85 percent of the two-year total decline in transfer enrollment (-250,700 out of -296,100).

Since the onset of the pandemic, transfer enrollment declined across all age groups. Younger studentss declined the most over two years (under 21, -45,400, -7.2%). However, in pandemic year 2, transfer enrollment increased 3.9 percent for younger students (+22,200), partially reversing the previous year's decline (-10.6%, -67,600). For older students (21 and older), transfer enrollment declined by 16.2 percent (-250,700) over the last two years, with steady declines each year (-131,500, -8.5% in year 1 and -119,200, -8.4% in year 2). Strikingly, older students made up 70 percent of transfers over the two pandemic years, yet reflect 85 percent of transfer declines from pre-pandemic levels (-296,100).

In upward transfer pathways, older students saw double-digit rate declines. However, younger students made gains in year 2 (+3,700, +1.4%), which were enough to overcome decreases in year 1 (-1,100, -0.4%) and surpass pre-pandemic levels (+2,600, +1.0%). Younger upward transfers grew for out-of-state transfer in pandemic year 2 (+7,300, +17.1%), for the cumulative growth of 19.1 percent (+8,100) since the onset of the pandemic.

Likewise, younger lateral four-year transfers into out-of-state institutions increased at a higher rate (+9.9%, +5,300) compared to in-state institutions (+2.9%, +2,000) in pandemic year 2. Nearly 4 in 10 lateral transfers to four-year institutions are younger students (38.7%), and this share has grown by almost 3 percentage points over the last two years (36.0%). Growth of lateral transfers in this age group in year 2 led to a near full recovery to pre-pandemic levels (see Appendix). These increases did not occur among older students over 20, who experienced a two-year total decline of 11.6 percent (-29,100).

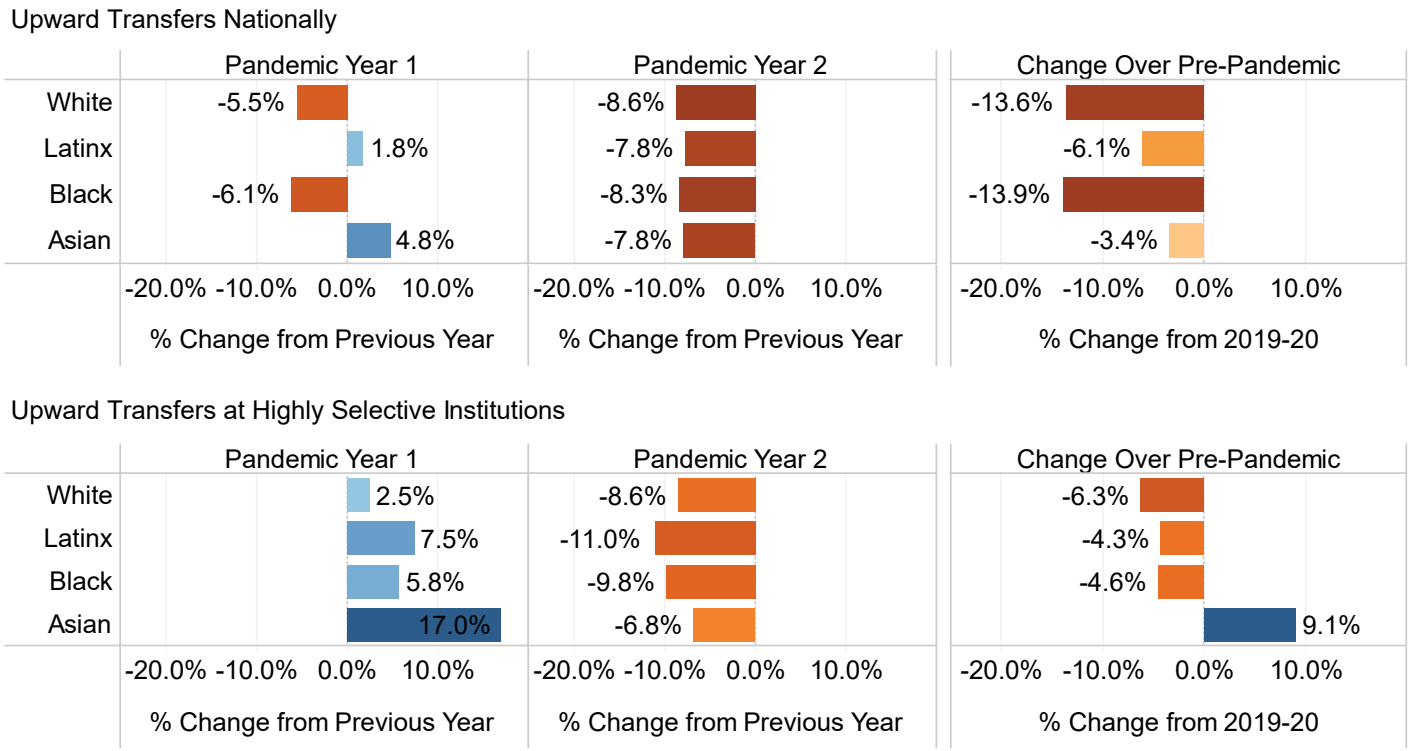
Transfer enrollment declined the most among White, Black, and Native American students. Latinx transfer enrollment increased for lateral transfer but decreased in upward transfer, while Latinx persistence declined.

Since the onset of the pandemic, transfer decreases were sharpest for White (-163,100, -16.4%), Black (-54,800, -16.4%), and Native American (-3,100, -15.6%) students. Declines in transfer enrollment among these racial ethnic groups was steeper during pandemic year 1 (-97,300, -9.8% for White; -44,400, -13.3% for Black; -2,100, -10.7% for Native American) compared to pandemic year 2 (-65,900, -7.3% for White; -10,400, -3.6% for Black; -1,000, -5.4% for Native American). Declines in transfer enrollment among these racial ethnic groups was steeper during pandemic year 1 compared to pandemic year 2. The declines in Black transfer enrollment overall in pandemic year 2 contrast with a 7.7 percent increase in transfer enrollment at HBCUs (see Section 4 for more on HBCU enrollment).

Similar to overall transfer enrollment, upward transfer decreased among White (-58,000, -13.6%), Black (-15,700, -13.9%), and Native American (-1, 100, -15.6%) students over the two pandemic years (see Appendix). It is particularly notable that the enrollment gains made in year 1 by Latinx and Asian upward transfers (+3,000, +1.8% and +2,500, +4.8%, respectively) were erased in year 2, with both groups falling about 7.8 percent (-13,000 for Latinx and -4,300 for Asian).

In a sharp contrast to the previous year's upward transfer growth, highly selective institutions lost ground in year 2, with the largest numerical drops in upward transfer students among White (-3,000, -8.6%) and Latinx students (-1,300, -11.0%). White students at highly selective institutions resulted in the largest two-year decline of any major racial/ethnic group in upward transfer pathways (see Figure 7).

Figure 7. Highly selective institutions lost ground in year 2 in all racial and ethnic groups.



Note: Changes in upward transfer for Native American students not shown due to small N. See appendix for additional detail on Native American transfer students.

In lateral four-year transfer pathways, most racial and ethnic groups declined during the pandemic (see Appendix). Latinx enrollment increased by 1.1 percent (+500) over the last two years after year 2 increases more than made up for year 1 declines. All other racial and ethnic groups declined by 1 to 3 percent in year 2. Similarly, Latinx enrollment at Hispanic-Serving Institutions (HSIs, see section 4 for more detail) increased in pandemic year 2 but the increase was small (+0.8%) and did not fully reverse declines in lateral transfer in pandemic year 1.

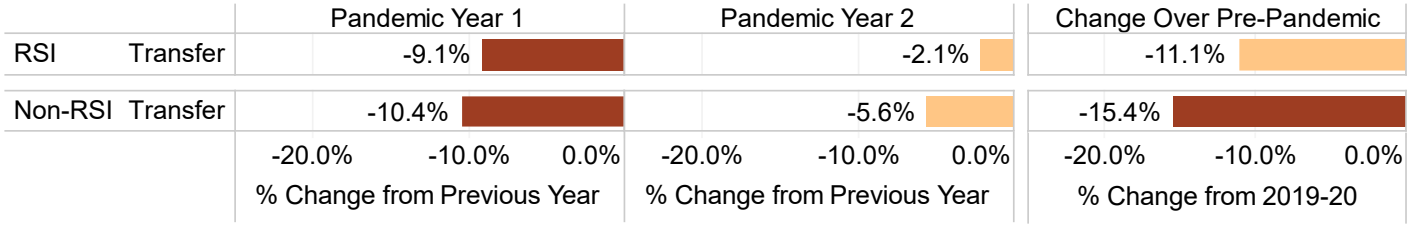
As noted previously, fall term persistence rates decreased for all racial and ethnic groups over the last two years of the pandemic, with the largest cumulative decreases among Native American (-1.7 pp from fall 2019) and Latinx (-1.0 pp from fall 2019) students. For both Latinx and Native American students, persistence consistently declined year after year. However, Latinx persistence rate changes diverged in year 2 depending on the sector of destination institution. Latinx students transferring to private for-profit four-year institutions experienced a fall persistence rate increase of 1.1 pp, while remaining relatively stable at other four-year institutions (see Appendix). In contrast, those who transferred to community colleges experienced large declines (-1.7 pp).

SECTION 4. RURAL-SERVING INSTITUTIONS, HISTORICALLY BLACK COLLEGES AND UNIVERSITIES, AND HISPANIC-SERVING INSTITUTIONS

Rural-Serving Institutions (RSIs)

The pandemic's effects on transfer students differed at postsecondary institutions that serve rural communities. RSIs were impacted less severely than non-RSIs over the last two years, although double-digit rate drops in transfer enrollment were in common (-51,900, -11.1% for RSIs vs. -225,900, -15.4% for non-RSIs; see Figure 8).

Figure 8. RSIs did not fall as sharply as Non-RSIs in transfer enrollment overall.



While the transfer-in rate (a share of undergraduate enrollment that are transfer students) is somewhat similar (16.6% for RSIs; 16.7% for non-RSIs), the demographic characteristics of students served at RSIs are different. Compared to non-RSIs, RSIs serve transfer students that tend to be younger (40.1% vs. 32.8%), more Whites (59.8% vs. 40.1%) and more Native Americans (1.7% vs. 0.6%). There are also fewer Latinx (9.9% vs. 22.0%), Black (12.6% vs. 14.3%), and Asian students (2.5% vs. 6.6%). More information about RSI transfer students can be found in Appendix, including U.S. maps by state with transfer enrollment change.

The pandemic's impact on transfer enrollment at RSIs was equally severe in all transfer pathways. Transfers into two-year colleges (reverse and lateral transfer) saw double-digit rate declines, though non-RSIs experienced steeper rates of decline than RSIs in these pathways (-11.7%, -9,700 vs. -20.0%, -56,600 for non-RSIs in reverse transfers; -14.1%, -14,700 vs. -23.5%, -98,200 for non-RSIs in lateral transfers; see Appendix). At four-year institutions, the rate at which upward transfer enrollment declined was slightly steeper for RSIs (-11.1%, -22,000 versus -10.0%, -55,700 for non-RSIs; see Figure 9). It is noteworthy that RSIs fell more steeply than non-RSIs in year 1, but the decline only accelerated at non-RSIs in year 2.

Lateral transfer declined at similar rates for RSIs and non-RSIs over the last two years (-6.6%, -5,500 for RSIs and -7.5%, -15,400 for non-RSIs) and both began to recover in year 2 in the public sector (+1,900, +3.1% and +1,600, +1.4%, respectively). Notably, private non-profit four-year RSIs were worst hit, having fallen most steeply in year 1 and remaining 14 percent below pre-pandemic levels after year 2 (see Figure 10).

RSI Transfer Enrollment AY 2021-22

By sector:

Pubic 4YR	51.5%
Private Nonprofit 4YR	9.7%
Public 2YR	38.6%

Note: Private Two-Years are not shown.

By region:

South	47.7%
Midwest	28.2%
West	16.3%
Northeast	7.8%

Institution selectivity did not have differential impacts on RSIs or non-RSIs overall (see Appendix). One exception was lateral transfer students enrolling in less competitive non-RSIs, which saw double-digit rate declines during the pandemic (-14.7%, -2,800) while RSIs were virtually unimpacted (-0.4%).

Transfer students entering RSIs tend to persist at higher rates after transferring, and persistence did not deteriorate as much compared to non-RSIs (see Appendix). Patterns of persistence by gender also differ from non-RSIs, with male transfer students making relatively greater gains over females at RSIs. For example, male persistence rates improved in year 2 after declining the previous year (-0.4 pp vs. +1.1 pp) compared to consistent declines at non-RSIs (-0.1 pp and -0.2 pp). For women, persistence rates for RSI and non-RSI followed similar patterns, though non-RSI women saw larger declines compared to RSI women (see Appendix).

Figure 9. RSI upward transfers fell more steeply than non-RSI students in year 1 but the declines only accelerated at non-RSIs in year 2. Private nonprofit RSIs were hardest hit in both years.

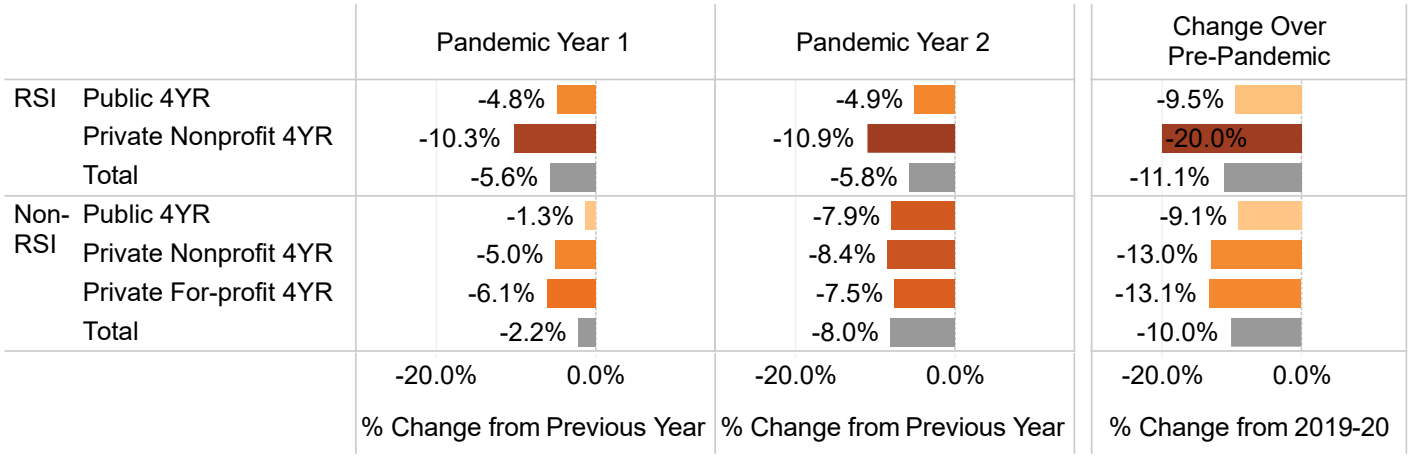
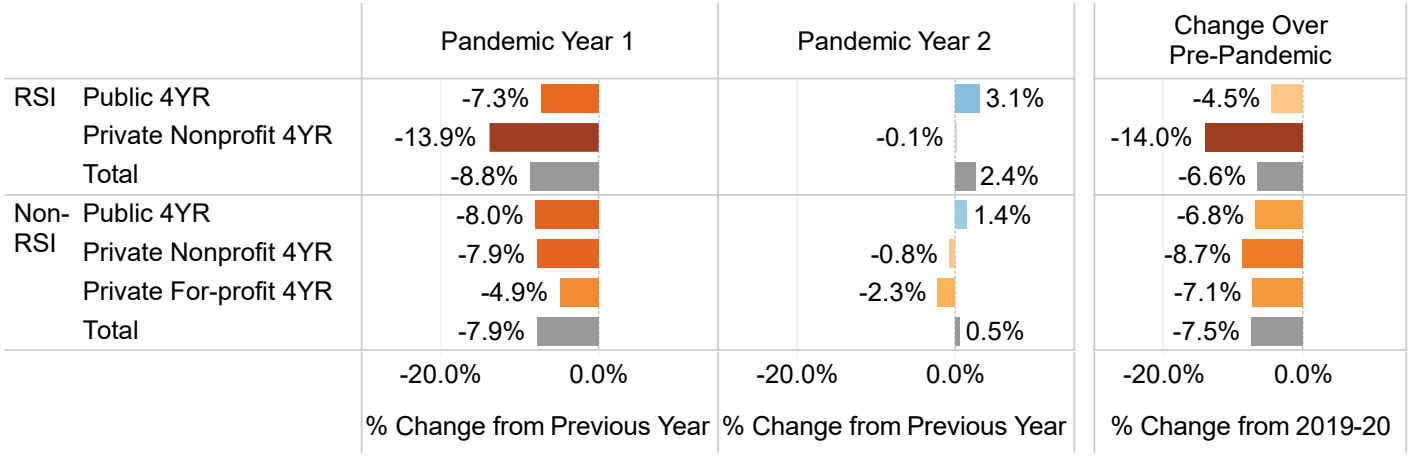


Figure 10. Similar to upward transfer, private nonprofit four-year RSIs were worst hit in lateral transfer pathways.



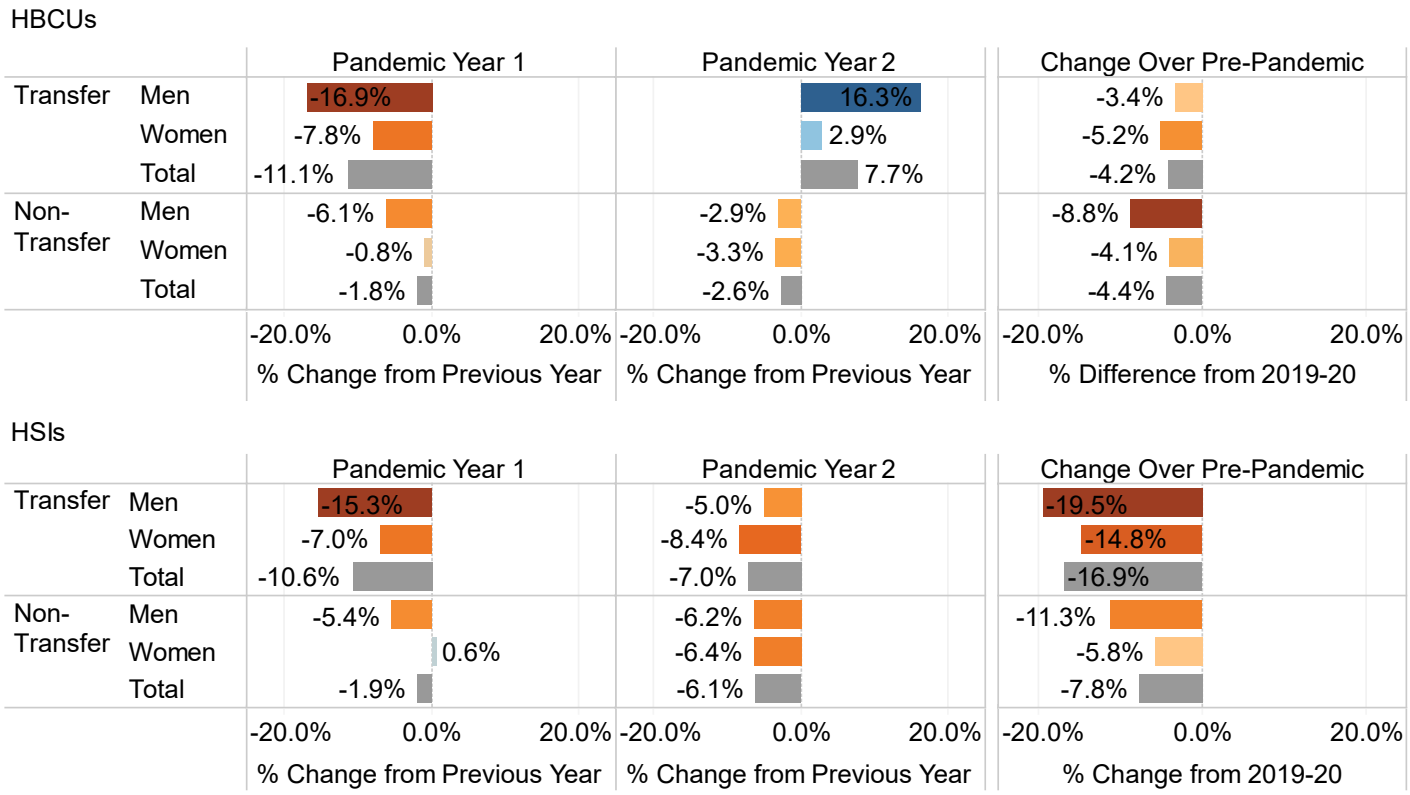
Historically Black Colleges and Universities (HBCUs)

Both transfer and non-transfer enrollments at HBCUs declined at similar rates from the start of the pandemic (see Figure 11). However, unlike the steady declines among non-transfer students, transfer enrollment drastically shifted from a steep decline in year 1 (-2,700, -11.1%) to rebounding year 2 (+1,700, +7.7%), largely driven by the gains among men. As a result, men declined less than women over a two-year period since the pandemic (-3.4%, -300 for men vs. -5.2%, -800 for women).

Most HBCU transfer pathways declined during the pandemic. One exception was the stabilization of lateral four-year transfers in year 2 (+100, +1.1%), driven by an influx of students transferring into HBCUs (+1,000, +15.8%). Upward transfers saw sharper declines for women over the last two years (-800, -9.0% vs. -300, -6.8% for men), driven by the gains among men during the second year (+400, +9.6%) whereas women continued to decline (-200, -2.8%). Black upward transfers into HBCUs declined since the pandemic began (-800, -5.3%) but their second year rebound is notable (+1,000, +7.1%).

Persistence after transfer was stable at HBCUs, remaining at 84.0 percent for fall 2021 transfers after declining just 0.4 pp for fall 2020 transfers (see Appendix). The stability masks an increase in persistence for lateral four-year transfers (1.2 pp) and a slight decline for upward transfers (-0.2 pp). Nonetheless, as of fall 2021, more upward transfers persisted into spring 2022 compared to lateral four-year transfers (87.0% and 84.8% respectively).

Figure 11. Growth among men transferring into HBCUs in year 2 largely offset declines from year 1.



Hispanic-Serving Institutions (HSIs)

At HSIs, transfer student enrollment declined at more than double the rate of non-transfer students (-16.9%, -102,400 vs. -7.8%, -202,800). Transfer enrollment decreased more in pandemic year 1 (-64,300, -10.6% vs. -38,100, -7.0% year 2).

HSI transfer enrollment decreased across all transfer pathways, with two-year institution destinations suffering double-digit rate declines (see Appendix). Lateral four-year transfers declined at a lower rate compared to non-HSIs (-1,600, -3.9% for HSIs vs. -28,300, -8.0%) due to stabilizing enrollment during pandemic year 2 (-400, -0.9%). Latinx lateral four-year transfers were the only major racial and ethnic group to return to pre-pandemic levels (+600, +5.1%) whereas all other groups declined (see Appendix). In contrast, Latinx upward transfer enrollment in year 2 remained below pre-pandemic levels (-5,800, -7.7%) due to declines in year 2 (-7,500, -9.8%) completely erasing the gains from the previous year (+1,700, +2.3%).

Fall 2021 HSI persistence rates decreased 1.5 pp from fall 2020, dropping below the pre-pandemic rate (79.4% pre-pandemic vs. 78.8% in fall 2021; see Appendix). Both men and women who transferred into HSIs saw persistence rate declines (-1.6 pp and -1.4 pp, respectively, in fall 2021; see Appendix).

Upward transfer persistence rates showed a different pattern. During pandemic year 1, even though upward transfer enrollment grew (+400, +0.2%), persistence rates declined (-1.0 pp in fall 2020; -1.3 pp in spring 2021). During pandemic year 2, fall persistence rates did not change from the previous fall (91.1%). Similarly, lateral four-year transfers saw sharp declines in the persistence rate for students who transferred in spring 2021 (-3.0 pp), but the persistence rate was stable for students who transferred in fall 2021, growing 0.2 pp compared to fall 2020 transfers.

SUMMARY AND IMPLICATIONS

Following widespread availability of COVID-19 vaccines in early 2021, many institutions hoped there would be a return to pre-pandemic normalcy in pandemic year 2 (AY 2021-22). Instead, the pandemic continued to impact transfer pathways, in some cases, at accelerated rates. This report summarizes the findings from two years of tracking transfer trends, examining how the pandemic has changed transfer pathways and student persistence post-transfer, broken out by academic year, student demographics, and institutional characteristics such as sector, selectivity, RSIs, HBCUs, and HSIs.

Prior to the pandemic (AY 2019-20), nearly 2.2 million students transferred to another institution to continue their college careers. In the following two years, as the pandemic interrupted the plans of many students, freshmen in particular, transfer enrollment declined at double the rate of non-transfer enrollment (-13.5% vs. -6.3%, excluding freshmen). Transfers declined regardless of the pathway pursued: Transfer into two-year institutions suffered the steepest declines (-19.9%, -180,200), mirroring the broader enrollment crisis at two-year colleges documented in the *Stay Informed* and the *Current Term Enrollment Estimates* reports. Students transferring into a four-year institution declined less steeply, with lateral transfers showing a 7.6 percent decline (-29,900) and upward transfers a 9.7 percent decline (-86,000). In pandemic year 1, highly selective four-year institutions were able to offset some of their losses among incoming freshmen with a small increase in transfers from two-year institutions. This helped to hold the decline in upward transfers into all four-year colleges in year 1 at just 2.3 percent, but proved short-lived as the losses jumped to 7.5 percent in year 2. Combined with more than 827,000 enrollment losses at community colleges over the past two years, these represent significant disruptions in the upward transfer pipeline—a critical path for access to a bachelor's degree for low-income and adult students—that are likely to persist beyond the pandemic.

The pandemic has magnified existing disparities among demographic groups, a recurring theme year after year. First, the gender divide has expanded during the pandemic, as transfer enrollment deteriorated more for men (-15.6%) than women (-12.2%). Most of this took place in pandemic year 1, which hit men much harder, while the pandemic disruptions began to affect women somewhat more adversely in year 2. If these trends continue, it is possible that

lingering effects of the pandemic may begin to jeopardize some of women's advancement in higher education of the past decades.

The pandemic also put older learners at higher risk of staying out of higher education. Older transfer students (21 or older) declined at more than double the rate of younger students (-16.2% vs -7.2%), and accounted for over 85 percent of all transfer declines since the pandemic began (-251K out of -296K). Strong labor market conditions, the growth of alternative career pathways, and rising college costs, in addition to many other factors more closely attributable to the pandemic, may all be contributors to a widening educational access and attainment gap for adult learners.

White, Black, and Native American transfer students all experienced double-digit rate declines during the pandemic (-163,100, -16.4%; -54,800, -16.4%; -3,100, -15.6%, respectively). While there was an early bright spot in pandemic year 1 when upward transfer grew for Latinx and Asian students, those gains were erased by accelerated declines in year 2, resulting in a net decline over the course of the pandemic (-10,000, -6.1% for Latinx students; -1,800, -3.4% for Asian students). As institutions seek to recover from enrollment declines while also increasing the diversity of the student body in order to better prepare all learners for the 21st century economy, there remains room to improve access to transfer and mobility pathways across higher education for all racial and ethnic groups.

Each of the institution types serving specific populations of students (RSIs, HBCUs, and HSIs) demonstrated differing transfer trends during the pandemic. Rural-serving institutions were impacted somewhat less severely than non-RSIs over the last two years (-51,900, -11.1% for RSIs vs. -225,800, -15.4% for non-RSIs). This may reflect the ways that the pandemic affected rural communities and rural economies differently from the rest of the country. HBCU enrollment declined during the pandemic at similar rates for transfers and non-transfers (-4.2%, -1,000 vs. -4.4%, -6,000, respectively). However, transfer enrollment grew during pandemic year 2 (+1,700, +7.7%), reversing a double-digit rate of decline of the previous year (-2,700, -11.1%). At HSIs, transfer enrollment suffered more than non-transfers during the pandemic (-102,400, -16.9% vs. -202,800, -7.8%). In addition, while HSI upward transfers remained stable in pandemic year 1, their persistence rates declined (-1.0 pp in fall 2020, -1.3 pp in spring 2021), confirming concerns raised in last year's annual report about the importance of student support after transferring.

Through this *COVID-19 Transfer* report series, we continually tracked how the pandemic was changing transfer pathways across postsecondary education. Our goal was to identify trends and raise areas of concern early enough for education and policy leaders to take corrective actions quickly. This ninth report of the series affords an opportunity to reflect on the shifting patterns of transfer enrollment that may represent, in some cases, the results of those early actions and in others, the changing effect of the pandemic itself on learners, communities, and institutions. Important examples of these shifts include the upward transfer growth between highly selective and less selective colleges, particularly as they played out differently among racial and ethnic groups and by gender. Such findings compound existing concerns about equity and access in higher education that have taken on greater urgency since the start of the pandemic.

The resurgence of COVID-19 through its variants and sub-variants reminds us that higher education is not immune to the lingering effects of the pandemic. More importantly, many current pandemic impacts will take years to work their way through the system, continuing to alter learners' educational trajectories and institutions' enrollment pipelines long after the pandemic ends. Today's missing transfer students will too often become tomorrow's missing graduates unless educators and policy makers respond quickly with interventions tailored to the needs of affected learners. The National Student Clearinghouse Research Center will continue to monitor transfer trends to inform those policies in the coming years.

METHODOLOGICAL NOTES

The *Transfer, Mobility, and Progress* series is designed to track the impact of COVID-19 on postsecondary transfer and mobility, using the two latest academic years' data (AY2020-21 and AY2021-22) and the previous academic year (AY2019-20) as a pre-pandemic baseline. The undergraduate population is further disaggregated by various subgroups of students, programs, institutions, states, or regions. Data represents student transfer pathways across 89 percent of the Clearinghouse universe of institutions reported as of June 2nd, 2022. It focuses on full academic year enrollment changes based on the same institutions' reporting as of June 2nd each year across three comparison years.

NATIONAL COVERAGE OF THE DATA

Clearinghouse data track enrollments nationally and are not limited by institutional and state boundaries. As of fall 2020, institutions actively submitting enrollment data to the Clearinghouse account for 97 percent of all enrollments at Title IV, degree-granting institutions in the U.S. Since Clearinghouse data is comprised of student-level data, researchers can use it to link concurrent as well as consecutive enrollments of individual students at multiple institutions. Therefore, it presents a unique opportunity to follow students' individual transfer patterns over their whole postsecondary experience. Unlike our standard Transfer and Mobility reports, where enrollment rates are weighted by data coverage rates, the *COVID-19 Transfer, Mobility, and Progress* series uses unweighted data. This is because the emphasis of this series is on trackingtransfer enrollment changes at the same institutions (a "fixed panel") rather than estimating the total transfer numbers.

PRE-PANDEMIC BASELINE DEVELOPMENT

To accurately assess the impact of COVID-19 on postsecondary transfer and mobility, the analyses focused on a fixed panel of all institutions that submitted data to the Clearinghouse during the same time frame across all comparison years. We created the panel to control institutional submission variability as well as variations in data submission dates. Only institutions that submitted enrollment data in 2019-20, 2020-21, and 2021-22 were included in the analyses. Institutions that discontinued or only started submitting enrollments at any point within these years were excluded. To control for submission timing among these institutions, only data that was submitted within the data submission window (specified in Term Definitions below) in each of the three academic years was included. The panel includes 89 percent of institutions that report to the Clearinghouse. However, it is important to note that even with these controls, enrollments at some institutions in the panel may have been overcounted or undercounted for 2022 due to unusual file submission patterns. Our investigations suggest that such data noise is minor.

TERM & ACADEMIC YEAR DEFINITIONS

Spring/fall term and academic year are defined as follows:

- Fall (07/01-12/31); Spring (01/01-04/30)
- Academic year: 07/01-06/30 (data cut-off of 06/02)

STUDENT POPULATION, TRANSFER DEFINITION, DIRECTIONS OF MOBILITY, AND PERSISTENCE

Undergraduate Student Population

This report includes all degree-seeking students who had a valid enrollment at a Title IV, degree-granting institution in the U.S., reported as of June 2nd in the specified years. Having a valid enrollment record means that a student is enrolled on a full-time or part-time basis (see "Enrollment Intensity" below). This definition also includes students who were dual enrolled prior to beginning their postsecondary career but excludes current dual enrollees. We then look at students' enrollment history to classify students into the following three subgroups: (1) first-time students, (2) continuing students and (3) returning students. Continuing and returning students were included only if they had not previously earned a bachelor's degree or higher. Students were included as either continuing or returning students if they had previously earned an associates or undergraduate certificate.

1. Freshmen or first-time students are identified as such:
    a. Students who were first-time during a fall term had no enrollment records or degree/certificate awards at Title IV U.S. institutions prior to the fall of the applicable year unless the previous enrollment record was before the student turned 17.7 years old or before the student graduated from high school (prior dual enrollment). The use of 17.7 is a modification from using age 18 as a cutoff to better classify first-time entering college students. As of fall 2021, roughly 273,100 students were between 17.7 and 17.9 at the time of postsecondary entry.
    b. Students who were first-time during a spring term had no enrollment records or degree/certificate awards at Title IV U.S. institutions prior to the spring of the applicable year, unless the previous enrollment records were before the student turned 18 years old or before the student graduated from high school (prior dual enrollment).
2. Continuing spring students are those students who had at least one valid enrollment in the last fall term prior to their spring enrollment. Continuing fall students are those students who had at least one valid enrollment in the same year prior to their fall enrollment, including summer enrollment.
3. Returning spring students are those students who returned after a stop-out of at least one term. Returning fall students are those students who returned after a stop-out and were therefore not enrolled in the same year prior to their fall enrollment, including summer

enrollment. Any length of stop-out was considered for this analysis.

Defining Transfer
We define students as transfer students if they previously were enrolled at a Title IV, degree-granting institution and subsequently enrolled in a different Title IV, degree-granting institution. Note that we only consider the change of institution a student is enrolled in, regardless of whether academic credits are recognized between institutions.
Academic year analysis of transfer is defined as follows:

1. Academic year transfer is defined by a student having a transfer record in either the fall, or spring term of the applicable academic year. A transfer designation was only counted once within an academic year. If a student transferred twice within an academic year, the first transfer record during the academic year was prioritized.
2. Academic year non-transfer students are those who enrolled at the same institution as their last enrolled institution. If a student did not have a transfer record in either the fall or spring term of the applicable academic year, they were classified as non-transfer.

Directions or Pathways of Student Transfer and Mobility
This report also investigates differences in the directions of student mobility. We categorize the following types or pathways of student mobility:

1. Upward transfer: Students who transferred from a two-year to a four-year institution, with or without first receiving an award (either a certificate or associate degree). This is also known as vertical transfer.
2. Reverse transfer: Student who transferred from a four-year to a two-year institution.
3. Lateral transfer: Students who either transferred from a two-year to a two-year institution or from a four-year to a four-year institution.

Persistence Rate of Transfer Students
The persistence rate post-transfer is determined by a student's first valid enrollment record in the subsequent term at *any* U.S. institution after the change of institution is identified. Having a valid enrollment record means that a student is enrolled on a full-time or part-time basis (see "Enrollment Intensity" below for more details).

1. *For students enrolled in a spring term:* If a student enrolled in the spring term as a transfer student, and then enrolled the following fall anywhere in the U.S., or graduated with a credential that spring, they were defined as persisted to the fall term. The persistence rate of transfer students to the following fall term is the number of students who persisted to the fall term divided by the number of spring's transfer students.
2. *For students enrolled in a fall term:* If a student was a transfer student in the fall term and then enrolled the following spring term anywhere in the U.S., or graduated with a credential that fall, they were defined as persisted to the spring term. The persistence rate of transfer students to the following spring term is the number of students who persisted into the spring term divided by the number of fall's transfer students.

For the analyses in this report, "pandemic year 1" refers to spring 2020 and fall 2020 persistence rates as these students persisted *to* fall 2020 and spring 2021, respectively. Persistence for "pandemic year 2" is reflected by spring 2021 and fall 2021 rates.

ENROLLMENT INTENSITY
Enrollment Intensity is defined as whether a student is full-time or part-time at the start of the term. A student's enrollment intensity is reported by the institution based on their own predetermined thresholds for what is considered full-time or part-time enrollment. To seamlessly define parttime, if an institution reported a student as either ¾-time, half time, or less than half time, then the student was defined as part-time for this report.

RACE AND ETHNICITY
Not all institutions report race and ethnicity data to the Clearinghouse. Missing data (for institutions that do not report to the Clearinghouse) and unknown data (for students that do not report to their institution) account for 18 percent of all undergraduates for the academic year and 11 percent of all transfer students analyzed in this analysis for AY2021-22. 3.7 percent more transfer students have a missing or unknown race and ethnicity this academic year over the previous year.

IN-STATE AND OUT-OF-STATE
Transfers are considered in-state if both institutions (of current enrollment and previous enrollment) are in the same state, and out-of-state if they are in different states. These designations apply regardless of the student's state of residence. Transfers to or from a multi-state institution (with campuses in more than one state) or primarily online institutions (any institution that reports more than 90 percent of its students enrolled exclusively in distance education courses) are excluded from state transfer analyses.

INSTITUTION SELECTIVITY INDEX
The Barron's Selectivity Index evaluates the competitiveness of an institution based on several admissions factors such as an institution's acceptance rate, SAT score, high school GPA, and high school class rank. Utilizing the 2016 Barron's selectivity list, the ranking categories are as follows:

1. Most Competitive – Institutions that generally admit less than a third of their total applicant pool. Students that are admitted generally have a high school class rank in the top 10-20 percent of their graduating class, and high school grade averages from A to B+. SAT and ACT scores are in the top 80th percentile. Out of the total 104 institutions in this category, 91% are included in this analysis.

2. Highly Competitive – Institutions that generally admit between a third to half of their applicant pool. Students that are admitted generally are in the top 20-35 percent of their high school graduating class, with high school grade averages from B+ to B. SAT and ACT scores are in the top 75th percentile. Out of the total 83 institutions in this category, 95% are included in this analysis.
3. Very Competitive – Institutions that generally admit between 50-75 percent of their applicant pool. Students that are admitted generally are in the top 35-50 percent of their graduating class and have high school grade averages of a B- or better. SAT and ACT scores are in the top 67th percentile. Out of the total 257 institutions in this category, 95% are included in this analysis.
4. Competitive – Institutions that generally admit between 75-85 percent of their applicant pool. Students that are admitted are generally in the top 50-65 percent of their high school graduating class and have a high school grade average of a B- or better. SAT and ACT scores are in the top 60th percentile. Out of the total 703 institutions in this category, 88% are included in this analysis.
5. Less Competitive – Institutions that generally admit more than 85 percent of their applicant pool. Students that are admitted generally rank in the top 65 percent of their graduating class and have high school grade averages below a C. SAT and ACT scores are below the top 60th percentile. Out of the total 208 institutions in this category, 81% are included in this analysis.
6. Non-Competitive – Institutions that either admit more than 98 percent of their applicant pool, admit all in-state residents, but have some requirements for out-of-state students, or require evidence of a high school diploma from an accredited school. Out of the total 54 institutions in this category, 76% are included in this analysis.
7. Special – Institutions that are specialized, such as professional schools of art, music, or other disciplines. Schools oriented towards adult learners are also sometimes in this category. Out of the total 67 institutions in this category, 72% are included in this analysis.
8. Unranked – all institutions not otherwise categorized in the Barron's selectivity index (N=229).

RURAL-SERVING INSTITUTIONS (RSIs)

We use the the Alliance for Research on Regional Colleges (ARRC) definition of Rural Serving Institutions (RSIs) as institutions that support education, social development, and security of rural communities. An RSI is determined by the composite score of the following factors:

- Percent of an institution's home county population classified as rural.
- Average percent of adjacent counties' population classified as rural.
- Population size of the institution's home county
- Whether the institution's home county is adjacent to a metropolitan area.
- Percent of the institution's total awards conferred in Agricultural, Natural Resources, and Parks & Recreation areas of study.

Institutions scoring over the average of 1.175 are considered an RSI. Of the 1,087 RSIs identified by the ARRC, 88.4 percent were matched in the Clearinghouse data. For this report, RSIs that are multi-state, primarily online institutions, or primarily associate degree-granting bachelor's institutions defined by the NSC Research Center were not included in the analysis.

RSI Counts by Institutional Sector

Sector	RSIs (%)
Public 2-year	415/444 (93.4%)
Public 4-year	276/325 (84.9%)
Private Nonprofit 4-year	265/310 (85.4%)
Total*	976/1,087 (88.4%)

*Private 2-years are not shown due to small sizes but are included in the total.

HISTORICALLY BLACK COLLEGES AND UNIVERSITIES (HBCUs)

Historically Black Colleges and Universities are defined as institutions that were established prior to 1964, that have a principal mission of educating Black Americans, and are accredited or making reasonable progress towards accreditation. The Clearinghouse data represents 69.7 percent of HBCUs for fall 2021; the panel of institutions analyzed for this report include approximately 76 percent of these HBCUs identified in the NSC universe.

HISPANIC-SERVING INSTITUTIONS (HSIs)

Hispanic-Serving Institutions are defined as institutions where 25 percent or more of their enrollment are Latinx students. We used the HSI list for 2020-21 by Excelencia. This results in 559 institutions. The Clearinghouse data covers 84 percent of HSIs for fall 2021; and 91 percent of these HSIs are represented in the panel of institutions used for the current analysis.

RECLASSIFICATIONS OF INSTITUTION SECTORS

This report defines institution sectors based on the IPEDS fall 2020 Institutional Characteristics data, the most current data available at the time of the publication. Our reporting is restricted to the fixed panel of institutions, and the institution sector defined by the latest IPEDS data is applied consistently across all comparison years 2020-21. This way we can estimate COVID-19's effects without disruptions of the sector reclassifications in between years. For the purposes of this report, we classify "Primarily Associate Degree-Granting Bachelor's Institutions" as two-year institutions for all comparison years regardless of when such a sectoral shift occurred. We also re-coded the "Mixed AA/BA institutions" in the Carnegie Classification as two-year institutions, for these institutions confer most awards at the associate degree level.

SUGGESTED CITATION

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