Rising Senior Report

A STUDY ON COVID-19'S IMPACT ON THE HIGH SCHOOL CLASS OF 2021

JUNE 15, 2020

CARNEGIE

MARKETING AND ENROLLMENT STRATEGY

Looking Ahead

Rapid changes to the higher education landscape resulted in a variety of questions about how fall will shape up for students, and Carnegie released multiple reports to help understand the coming scenarios. However, savvy institutions cannot wait to plan for the 2021 fall admissions cycle.

THIS REPORT CONTAINS INFORMATION FROM MORE THAN 1,500 RISING SENIOR VOICES.

Carnegie's highly experienced strategy and digital communication teams used this information to develop next step considerations and top insights for institutions hoping to to help guide them as they build their marketing and recruitment plans for the entering class of 2021.

60%

OF STUDENTS SAY
AN IN-PERSON
EXPERIENCE IS
CRITICAL

less than **5%**

SAY IT
PLAYS NO
ROLE
AT ALL

Rising Seniors Feel the Loss of In-Person Experiences

Campus closures during the coronavirus outbreak have caused widespread cancellations of in-person experiences for prospective students, such as campus tours and visit days. **This is a major concern for rising seniors, as three in five say an in-person experience with a prospective school has "a lot of" or "critical" importance. Less than 5% say it plays no role at all.** This gap is most true for White prospects and those intending to attend a private religious institution.

As a stopgap, schools have attempted virtual touring events. About 40% of the sample had taken part in a virtual tour and information session to date. Unfortunately, the response has been middling, with a majority of students (51%) saying it was only a "somewhat effective" replacement. Qualitative responses suggest the more intangible "feel," a fact critically served by traditional campus tours, was missing. Several suggested all the virtual tours they attended "felt the same," with many simply wanting to see some attempt at making interactions personal.

Qualitative responses suggest the more intangible "feel," a fact critically served by traditional campus tours, was missing.

"I really like being able to see the environment of the college campus in person to see how students look, dress, act, etc. It helps me decide if I could see my [sic] there and intermixed with campus life and culture. That was missing here."

Similarly, virtual college fairs have taken place of in-person offerings, though only about 13% of rising seniors have attended this type of event. The scores for effectiveness mirrored those for virtual tours, though it is important to note that historically underrepresented groups had more highly positive experiences. Here, the issue was a lack of depth and time.
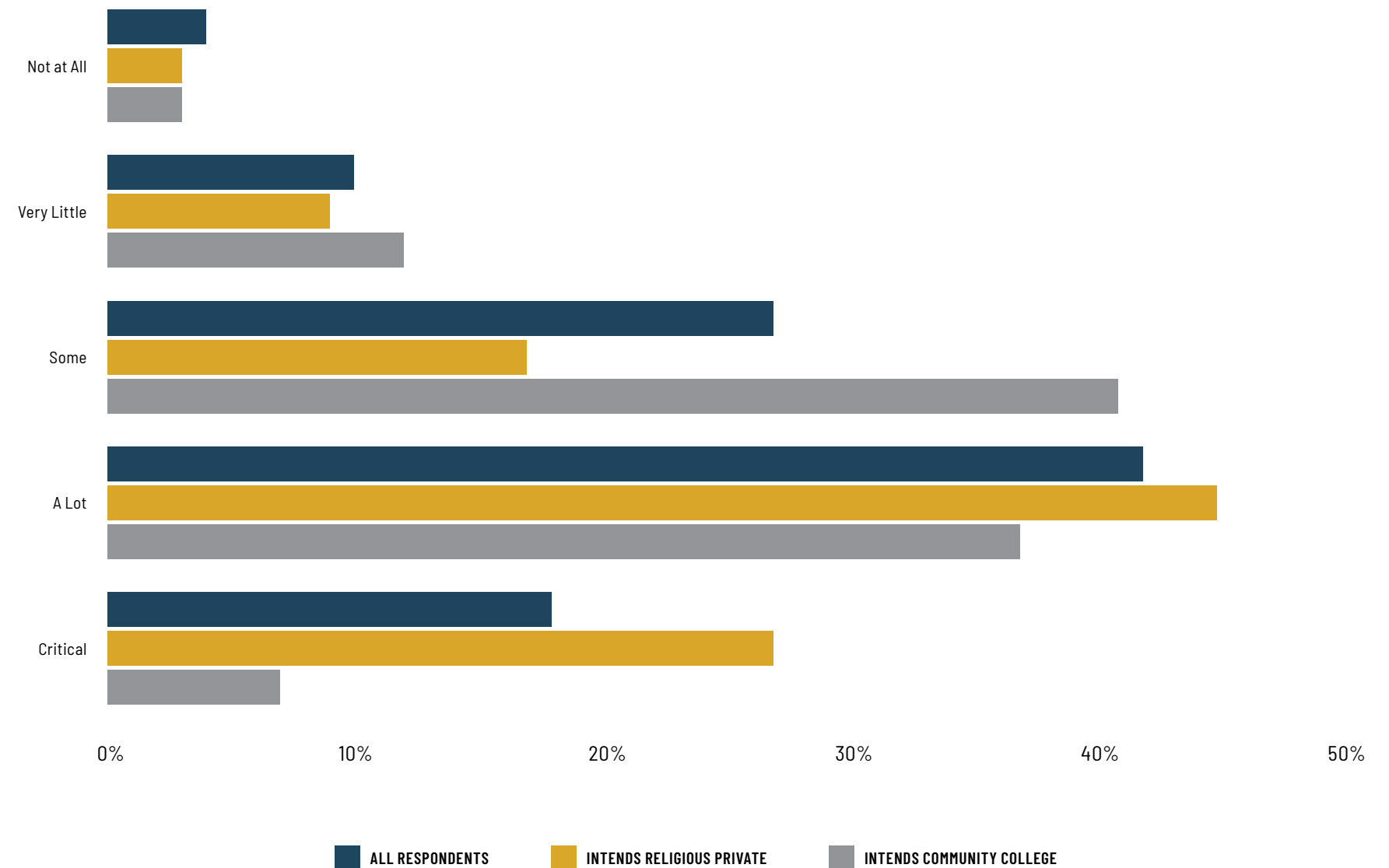
"There [sic] person to person interaction was a problem. The counselors could not spend time one-on-one, which is kind of what I'd go to a college fair. This fair seemed completely one-sided."

As a result, many rising seniors are still far from being able to make a decision about college. Just 8% feel they do not need additional touring or information sessions to apply. Of the remaining, a plurality (39%) say they need information but will wait until on-campus options become available. Another one in five say they will only attend a virtual event if it includes some incentive, like a waived application fee. The final third are likely to attend another virtual event in the future.

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IMPORTANCE OF AN IN-PERSON EXPERIENCE TO COLLEGE CHOICE

ACROSS ALL DEMOGRAPHICS, AN IN-PERSON EXPERIENCE HAS INCREDIBLE VALUE. STUDENTS WHO INTEND TO GO TO A COMMUNITY COLLEGE ARE NOT AS CONCERNED ABOUT THE IN-PERSON EXPERIENCE, YET MORE THAN FOUR OF FIVE STILL SAY IT HAS SOME OR GREATER IMPORTANCE.

Chart categories (top to bottom): Not at All, Very Little, Some, A Lot, Critical

Legend:
- ALL RESPONDENTS
- INTENDS RELIGIOUS PRIVATE
- INTENDS COMMUNITY COLLEGE

X-axis: 0%, 10%, 20%, 30%, 40%, 50%

The lack of options in person and general uncertainty about institutions and class format have prompted some consideration of moving back early application deadlines

CURRENT CONFIDENCE FROM STUDENTS SUGGESTS THAT MAY NOT BE NECESSARY

Confidence: Early Decision, At-Home Testing, and Gap Year Competition

With many schools offering an early application in November, rising senior audiences may be making choices within the 2020 calendar year. But the lack of in-person options—and general uncertainty about institutions and class format—has prompted some consideration of moving back those dates. Current confidence from students suggests that may not be necessary. Only one in five has no confidence to make their decision by then at all, and more than a third are somewhat confident. This is despite a contingency of having no access to any in-person experiences at all this fall. With only about one in five students typically applying early, these numbers do not suggest major concern, especially as there was no significant difference across socioeconomic status (often high-SES students are more likely to apply). Schools that wait to see what in-person experiences will be available this fall will be armed with better information about pushing back a potential date.

Another side effect of the shift to virtual life has been some testing moving to at-home models. **Respondents were asked about their level of concern about taking a major entrance exam (SAT or ACT) at home in a virtual setting. The results suggest that for every student who is less confident, there is also a student who is more confident.** One third of respondents said they have "the same" level of concern, one third said they were "far less" or "slightly less" concerned, and the final third said they were "far more" or "slightly more" concerned. Women were more concerned than men, as were high-achieving students, to see this new modality. Distractions, lack of focus, and technical problems were concerns of most, though some said they simply had no way to do the test.

"I don't have anywhere to go and I can't take it comfortably in my home."

"I have a very slow Internet connection. There could be power outages. Maybe it would take a long time to upload answers. Something could go wrong that is out of my control."

To date, more than half of the respondents (55%) said they already have taken a college entrance exam. In addition, 72% say they will definitely take a first/additional entrance exam in the future, with 22% saying they might take one. As such, there is still plenty of testing to be done.

As a result of testing changes, some schools are considering dropping a testing requirement for admission. So called "test-optional" schools were seen as slightly positive in attracting rising seniors. Among the respondents, 42% were more likely to apply to a test-optional school, while 48% said it makes no difference to them. Only one in 10 students would be less likely to apply to a school that is test-optional.

Another concept of confidence was tested in regards to the "gap year" that is presumed to be high among incoming seniors. Previous Carnegie work suggests campuses who go entirely online could see deferrals and cancelations up to 33%. As such, competition for the following entry class of fall 2021 might include more students. While this reality remains to be seen, some rising seniors have it on their minds. About 40% are "somewhat" or "highly" concerned about gap year competition. However, a quarter of respondents had not even considered this issue at all and are not concerned.

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CONCERN ABOUT 2021 ADMISSION COMPETITION DUE TO MORE 2020 HIGH SCHOOL SENIORS TAKING A GAP YEAR

MORE THAN A THIRD OF STUDENTS HAVE NO CONCERN ABOUT INCREASED COMPETITION FOR 2021 ADMISSIONS.

ALL RESPONDENTS   MEN   WOMEN
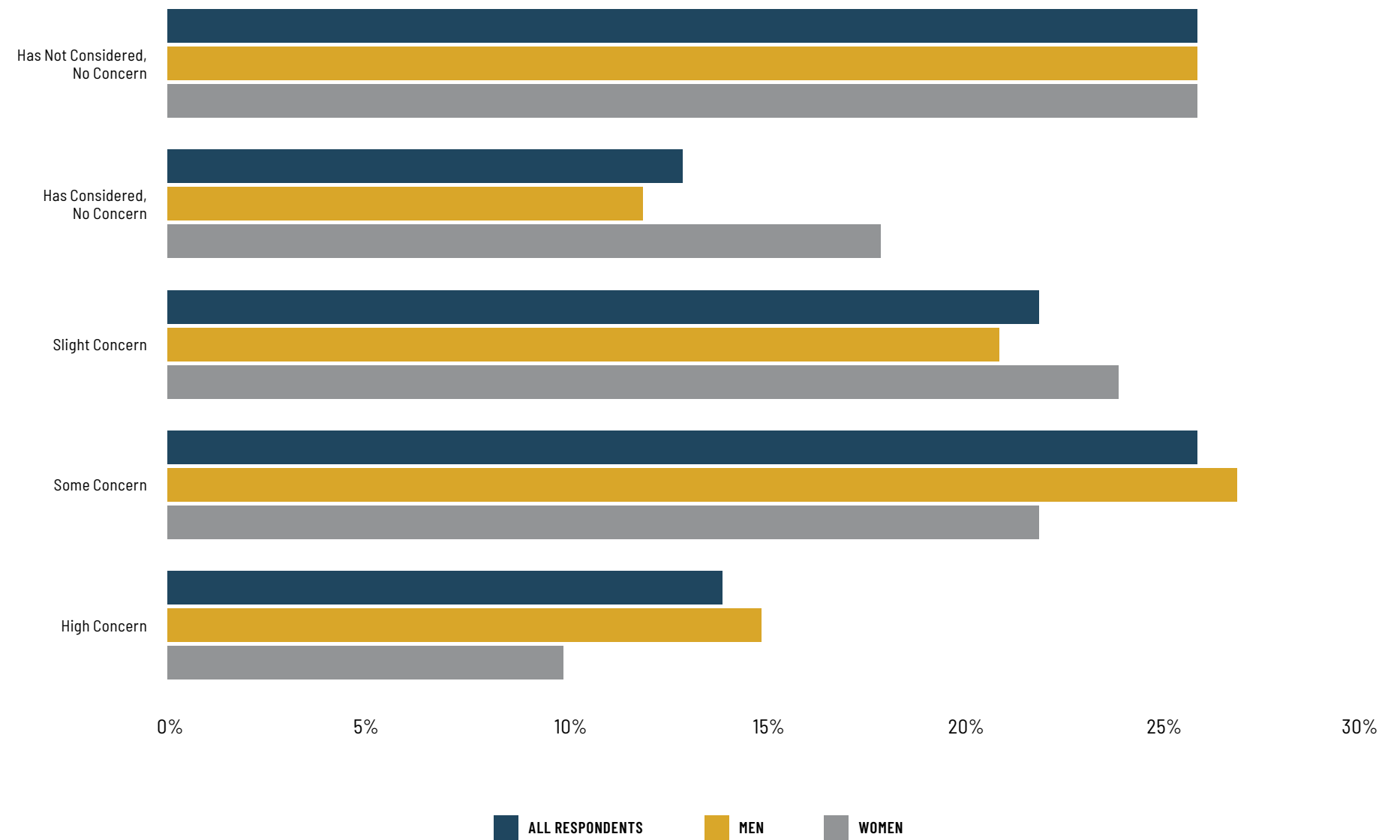
75%

COMMUNICATION AND INFORMATION SEEKING HAVE SHIFTED

ABOUT THREE IN FOUR STUDENTS ARE NOW
USING A COLLEGE'S OWN WEBSITE FOR
ACTIVE INFORMATION SEEKING, UP FROM
TWO OUT OF THREE IN THE PAST

College Choices and Communication Tactics

During the height of the outbreak, larger schools took a hit in popularity among incoming seniors, but the scores settled back to pre-COVID-19 levels by May. For this rising senior audience, size preference is also unchanged compared to before the outbreak. About half of students say they find a midsize institution as ideal, with a slight skew toward larger schools in the remainder. Women are looking for a slightly larger school experience, and those interested in a public school have a much higher average size interest than private school hopefuls.

Distance from home measures in college choice have returned to pre-COVID-19 levels. Most students say the ideal institution would be in their hometown or within about 150 miles of home. About 18% want to go beyond their immediate region, including one in 10 who want to go across the nation.

Similarly, distance from home measures in college choice have returned to pre-COVID-19 levels. Most students (53%) say the ideal institution would be in their hometown or within about 150 miles of home. About 18% want to go beyond their immediate region, including one in 10 who want to go across the nation. There are few major demographics differences on this response, and the scoring is equal to what prospects have said in studies in 2019. These results, and others across many areas, suggest that what students are actually going to look for in a school has not changed dramatically. A few areas of concern may be greater (health precautions and response to crises, for example), but the typical school attributes for college choice appear unchanged for the longterm.
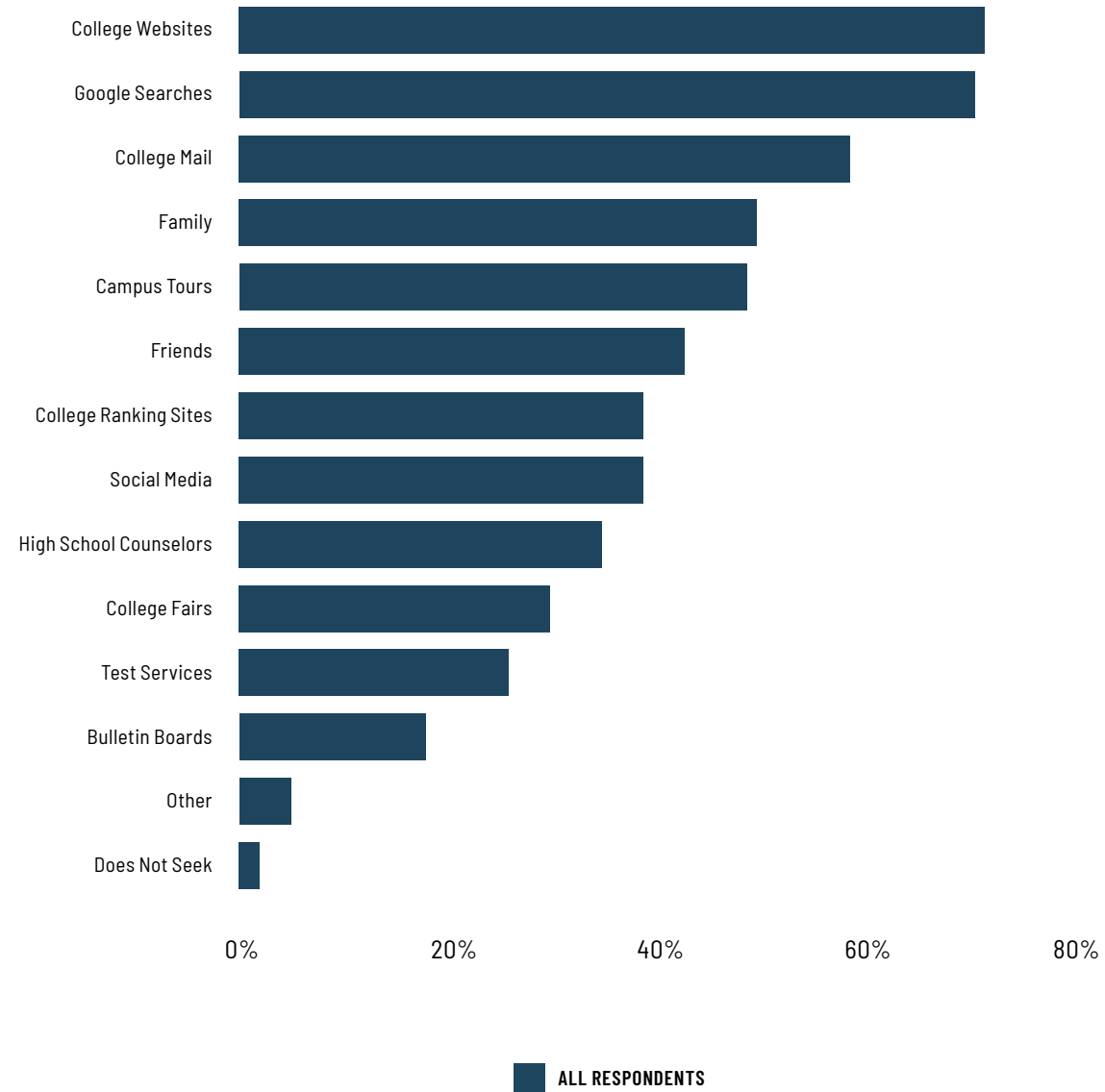
Communication and information seeking have shifted, however. Students are using more sources to actively seek out information and have gone to digital offerings with greater regularity. About three in four students are now using a college's own website for active information seeking, up from two out of three in the past. College mail is also slightly more used than previously, with students feeling more comfortable receiving it directly from institutions. Social media advertising, online banner ads, and YouTube video advertisements
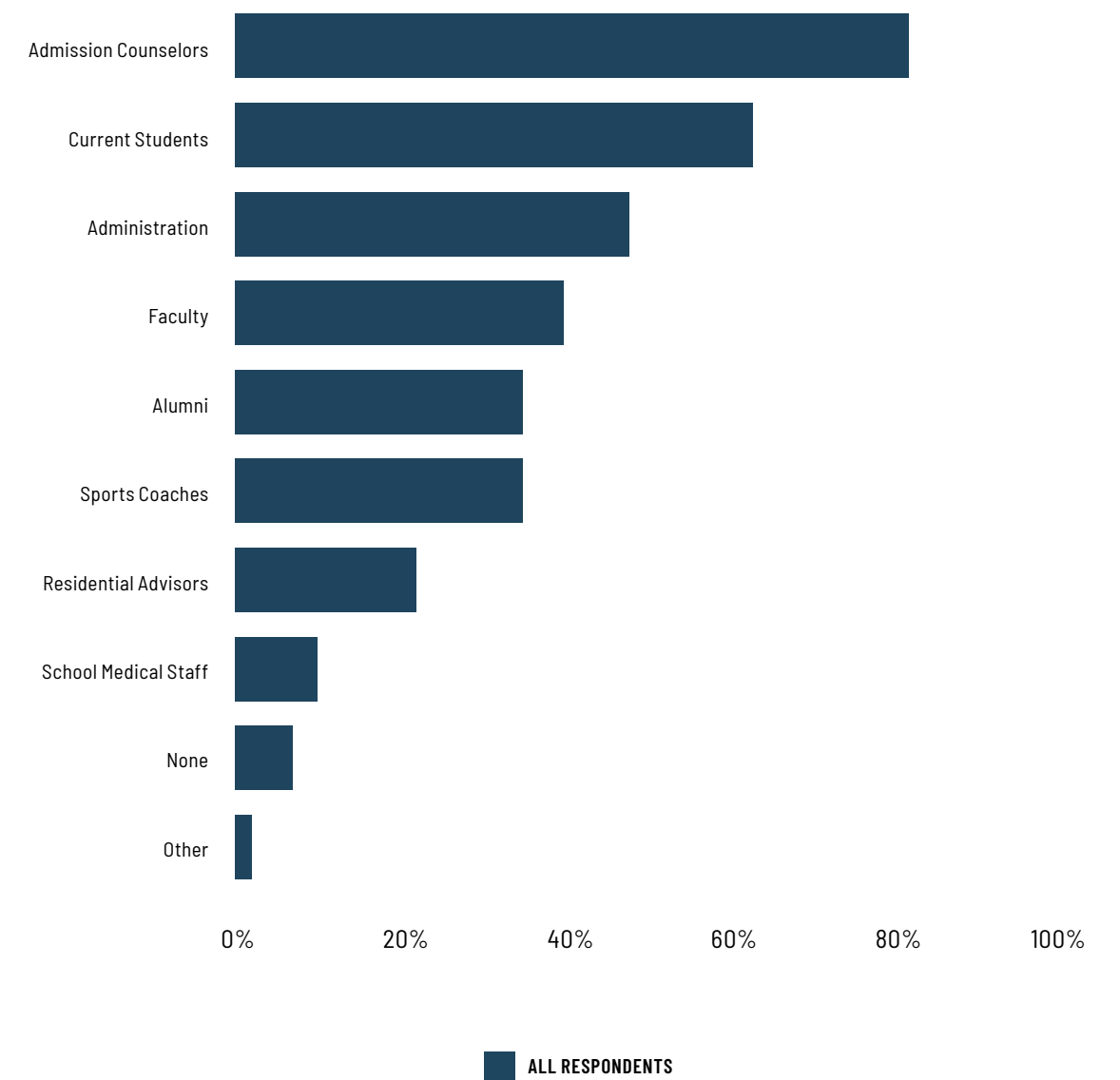
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are all seeing healthy acceptance, especially among women and people of color. These digital advertising tactics were actually more positively received than using text messages or social media direct messages. While email remains the highest-scored channel for receiving direct information from a school, the only format students are highly opposed to is direct phone calls.

INFORMATION-SEEKING SOURCES

Source	All Respondents
College Websites	~71%
Google Searches	~70%
College Mail	~58%
Family	~49%
Campus Tours	~48%
Friends	~43%
College Ranking Sites	~39%
Social Media	~39%
High School Counselors	~34%
College Fairs	~29%
Test Services	~25%
Bulletin Boards	~18%
Other	~5%
Does Not Seek	~2%

CONTACTS OF INTEREST

Contact	All Respondents
Admission Counselors	~81%
Current Students	~62%
Administration	~47%
Faculty	~40%
Alumni	~35%
Sports Coaches	~34%
Residential Advisors	~22%
School Medical Staff	~9%
None	~6%
Other	~2%

ALL RESPONDENTS

52%

AMONG OUR RESPONDENTS, MORE THAN HALF SAY THEY ARE MORE CONCERNED ABOUT PAYING FOR COLLEGE SINCE THE OUTBREAK

JUST 5% ARE IN A BETTER PLACE TO AFFORD COLLEGE
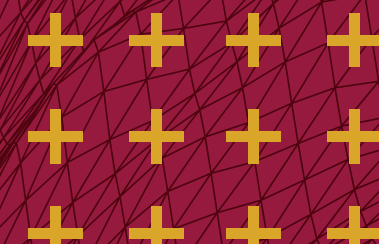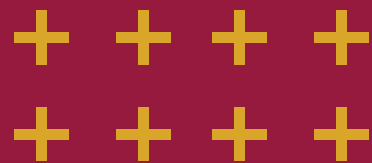
Financial Impact

Undoubtedly, economic changes will impact this rising senior class as it moves toward college. Among our respondents, more than half say they are more concerned about paying for college since the outbreak. The other half is mostly made up of those who see their concern as "about the same." Just 5% are in a better place to afford college. This concern is higher among women and Latinx audiences as well as those, not surprisingly, from low-SES homes, who already had the highest concern levels.

To explore financial challenges, the survey presented a series of situational impact measures respondents could select as true for them. **One in four rising senior prospects has had a parent laid offer, either permanently or temporarily, and nearly the same number has lost their own employment.** About two in five were lucky enough to have none of the impact statements selected. However, the schism between low SES (31% with no selected impact statements) and high SES (55% with no selected impact statements) is only going to increase the financial divide seen in higher education. On average, those who selected an impact statement selected two of a possible nine options.

Legend: ALL RESPONDENTS — LOW SES — HIGH SES

13
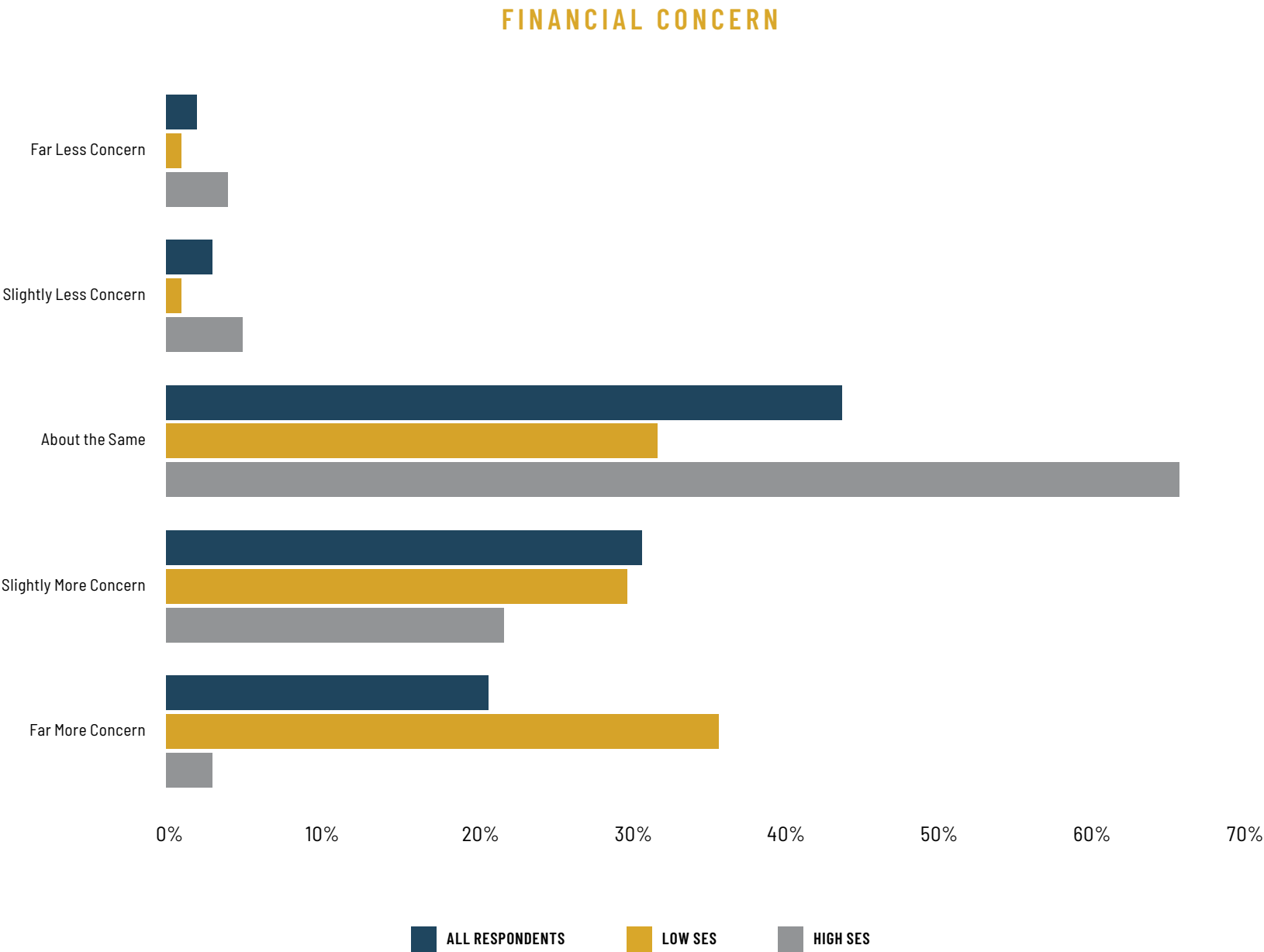
28%

MORE THAN A QUARTER OF RISING SENIORS WILL NOT CONSIDER ONLINE EDUCATION AT ALL
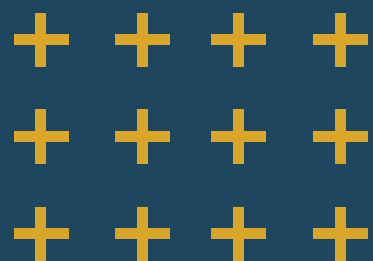
only **11%**

ARE STRONGLY CONSIDERING OR PREFER COURSES ONLINE

The Online Format Boomerang

At the height of the COVID-19 outbreak, many were suggesting a shift to online classes was potentially more permanent than some thought. In fact, Carnegie research in March showed seniors had more interest in online classes than ever before. However, much like with seniors rebounding to pre-COVID-19 interest in online classes, rising seniors have very little interest in taking coursework online. Only 11% are strongly considering or prefer courses online. More than a quarter will not consider online education at all. These numbers are similar to other research completed among prospect audiences well before COVID-19.

Perhaps more glaringly, when students were asked the effect of the outbreak on their opinion, half said their interest in online courses had actually dropped. The experience of online coursework for many high school students has reduced confidence in the modality, and many students are desperate for a college "experience" that includes more than classwork.

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Similarly but framed in a different question set, a plurality of students would prefer living on campus as incoming students. Only 3% say they would not consider living on campus. This is nearly identical to pre-COVID-19 work among prospects. To solidify, the same questions about "changing opinions" showed no significant change made by COVID-19. Students are still just as interested in living in residence halls.

INTEREST CHANGE FOR ONLINE INSTRUCTION

Legend: ALL RESPONDENTS · LOW SES · HIGH SES
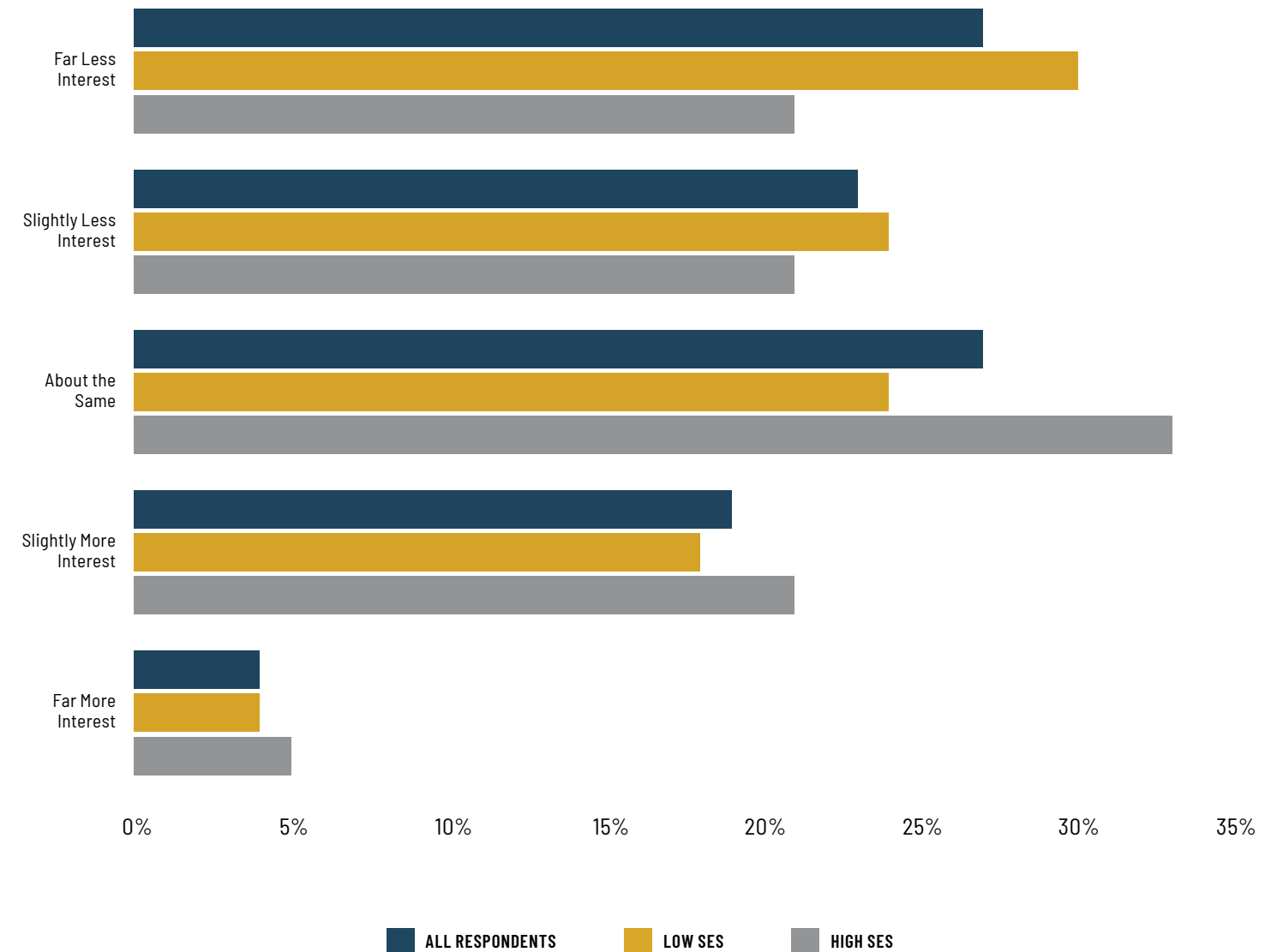
Rising Senior Survey
Strategic Recommendations

Now that you understand the data and results of our research, what are the implications for you? Here, we offer insights and recommendations within six areas to provide strategic direction based on everything we're learning together.

Campus Visits

SIXTY PERCENT OF RISING SENIORS INDICATED AN IN-PERSON CAMPUS VISIT EXPERIENCE IS CRITICAL TO THEM DESPITE THE PANDEMIC. AS YOU LOOK TO THE FALL AND CONSIDER THE VISIT OPTIONS YOU CAN REASONABLY OFFER WITHIN SOCIAL DISTANCING GUIDELINES, CONSIDER THE OPPORTUNITIES AND IMPERATIVES IT PRESENTS.

1 **Innovate and cultivate new campus visit experiences within emerging social distancing norms.**

Prospective rising seniors want the in-person experience, so create visit options that demonstrate who your institution is through narrative storytelling that enhances your opportunity to build affinity. Be sure to provide ample contact with admission counselors and current students. As noted on page 10, these are the top two contacts of interest for this prospective student audience.

2 **Take advantage of technologies and broadcasting capabilities to improve accessibility and engagement whether on campus or off.**

This can and should involve a robust audit of current visit activities and reimagine the program from the ground up with new goals, content, and formats.

3 Communicate expectations for the campus visit.

While you act to attract visitors and as you confirm registrations, provide detailed understanding of what the experience will be like, including the ways you'll maintain social distancing, what the prospective students and their families must do to prepare, and what you'll provide upon arrival. As we assess campus visit programs across the country, we often find that wayfinding is a central challenge upon arrival. Think about your confirmation communications as the beginning of wayfinding and help your visitors know what to expect and their role within the new visitation norms your institution chooses to establish.

4 Consider offering more on-campus visit options, if possible, in light of the reduced number of visitors you'll likely be able to accommodate per option.

This will be necessary simply to get into the neighborhood of the number of on-campus visitors you'd typically expect to welcome.

With the absence of in-person visit events this spring, 40% of rising seniors surveyed reported having participated in a virtual tour and/or information session, but they were largely dissatisfied with those experiences.

Students told us virtual experiences "all felt the same."

These data points highlight three specific opportunities for colleges and universities to gain a competitive advantage:

1 Deliver a distinct and personalized virtual experience.

The tendency in higher education has been to use campus visits, even when in person, to deliver information rather than to tell emotive stories that distinctively differentiate the institution. Now is not the time to revert to information-heavy sessions that lack personality. Prospective students long for connection and are hungry to experience how you are different from other schools. Build virtual experiences that engage audiences and appeal to their emotions. Ask questions in event registration that will feed you valuable data on who your prospective students are and then leverage those data points to shape custom content that will show those students how they will fit in at your school. It is clear students have developed an expectation for what these events will be like, and they're not excited about it. So flip the script. Deliver a peak experience. Make your events fun and interactive, interesting and engaging. Is this harder in a virtual setting? Absolutely. Will it take creative and out-of-the-box thinking? Of course. But creating these types of virtual experiences will separate you from your competition and pay dividends in the end.

2 Include current students in every virtual event.

The data indicates that current students are second only to admission counselors among desired contacts for rising seniors. Leverage your student ambassadors, tour guides, and interns as much as you possibly can to provide their critical perspective within the virtual programs. Then ensure the attendees have the ability to contact your selected ambassadors after the event.

3 Double-down on promoting your virtual events.

The fact that only 40% of college-searching rising seniors have participated in a virtual visit event tells us there is ample opportunity to engage more students. That takes strategic and targeted promotion, and there's no better way to reach prospective students and their families than through digital marketing. Participating in a virtual event will not feel as natural for prospective students, and they will not be compelled to register as organically as they have in the past. The push from high school counselors and teachers, the wave of peer interaction and pressure of others visiting schools, the organized group visits—all of that has been interrupted by COVID-19. As a result, you need to surround them with your message and keep them thinking about how they can engage and interact with your school. You can be very targeted with segmentation in messaging across multiple channels and platforms, reaching students and their parents with display advertising, keyword targeting, social media, and notably on YouTube. Leverage your video assets across all platforms to pique audience interest and draw them in for a virtual event.

It's impossible to ignore the strong desire among students to return to on-campus visits.

Of course, we all want to return to "normal." But we're not there yet. **So, while you might not be ready to open back up for business, it is imperative during this time to communicate transparently about your plans for on-campus visits in the future.** This offers comfort and a light at the end of the tunnel. Of course, your plans might change, and it's important to note that. But, to the best of your ability, tell them what your plans are and what a campus visit experience will look like on the other side.

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Search Tactics and Inquiry Generation

GIVEN THE DATA AND MACRO ENVIRONMENT SURROUNDING TESTING, LEAD SOURCES, AND AVAILABILITY, IT IS ADVISABLE TO BROADEN STRATEGIES FOR LEAD GENERATION TO SUPPORT THE ACTIVE RECRUITMENT OF NEXT YEAR'S CLASS. THE REALITY OF SHIFTING TEST DATES AND FORMATS IS THAT NAMES WILL STILL BE AVAILABLE FOR PURCHASE BUT AT DIFFERENT INTERVALS, WITH DIFFERENT COMBINED DATA SETS AND HISTORICAL VALUE THAN IN PAST YEARS.

1 Expand lead generation sources.

As a result of these changes, it's wise to broaden your sources through which leads are procured beyond one or two. This mitigates the risk of any one source proving to be insufficient for your recruiting needs.

2 Refocus your digital.

Given the uncertainty surrounding inquiry generation, there's strategic sense in amping the controllable marketing efforts you have in the early stage of the admission cycle to generate more organic site traffic and RFI completions. Applying additional budget allocation to digital advertising in this early stage can help any institution ensure there are enough interested prospects in their recruiting pipeline to yield their desired class size.

3 Start early.

If you're like most best practice institutions out there, you've been recruiting a large volume of prospects since their sophomore year of high school. Given that longer runway, you can leverage your inquiries from the past couple years to maximum effect. It may be wise to revisit and refocus your communications flow to these populations in order to engage differently given the interest in more frequent communications outlined in past COVID-19 studies.

4 Leverage your CRM.

If you have no summer travel plans, it might be time to consider building out your CRM and internal capabilities to leverage these tools for search protocols. The sophistication of some of the industry's top CRMs are more than equipped to build and manage the search campaign drips required to move the operation in-house. This might save you some money on outsourcing that can be applied elsewhere in the operation to reboot your visit programs or expand your digital reach.

Early Decision, At-Home Testing
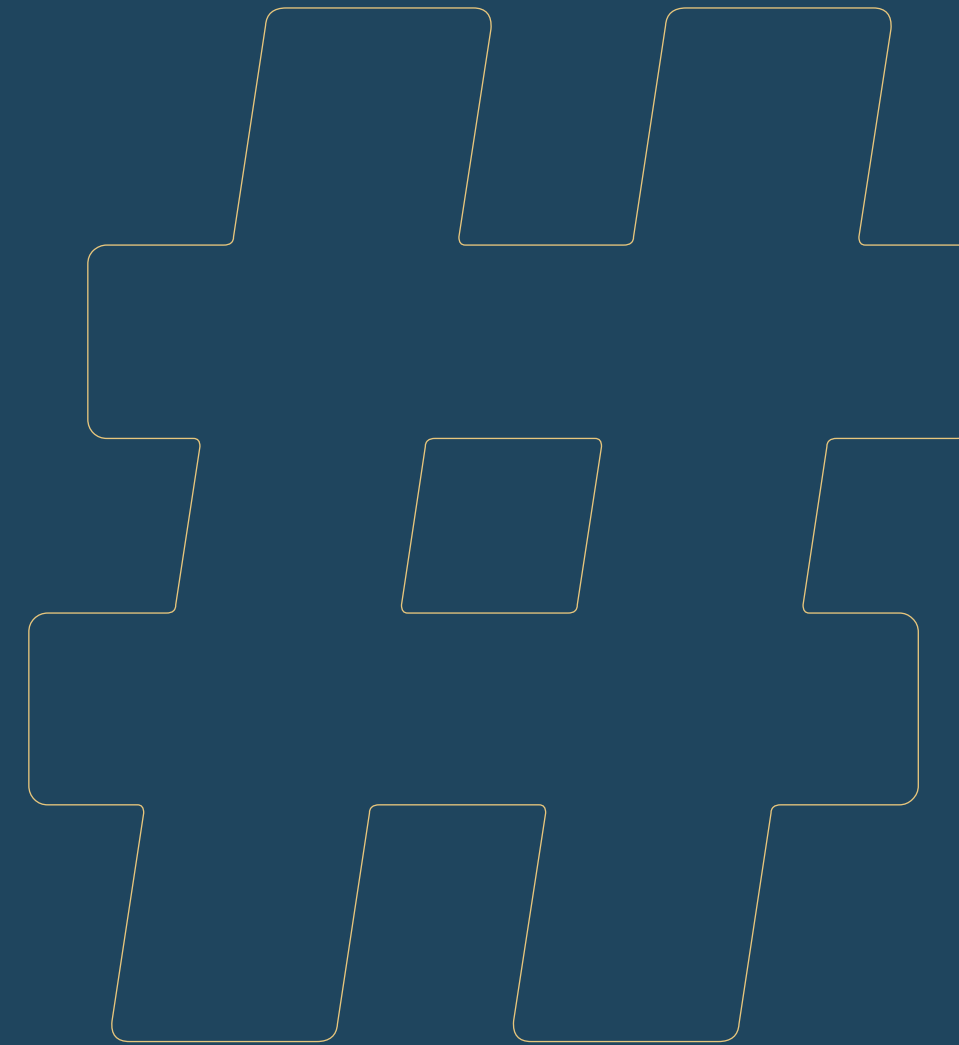
1 Assess and reimagine your communications flow and sync it with digital marketing strategy.

It doesn't appear the application cycle for fall 2021 will be disrupted from an online perspective, at least not yet. The majority of rising seniors indicate confidence in being able to decide where to apply by mid-fall, although reinforcement of that decision through activities like fairs and visits may be lacking. This data point reinforces the importance of a revised and strong marketing campaign to rising seniors, one that will build deep affinity through storytelling and encourage (at least for now) virtual engagement. In the absence of in-person interaction, this comm-flow might be the most important one you ever design in terms of impact on institutional sustainability. The frequency of communication will have to be higher, the messaging more targeted and personalized, and the stories more relevant and powerful. In terms of delivery, cross-channel integration is critically important. Not only will your CRM email

campaigns need to be fine-tuned, but they'll need to be in perfect sync with your digital marketing efforts. You'll need to execute from market cultivation and lead generation through paid search, social media advertising, TV/radio streaming services, and display advertising, to hyper-targeted list-based tactics like IP Targeting, Facebook/Instagram, and Snapchat. Your content strategy on your .edu will need to mirror and amplify what's happening in the paid digital space as well. Once you drive them to your website—where more and more of them are actively seeking connection—the user experience will be more important than ever. What's the path you need them to take? Do you make it easy for prospective students to request information or sign up for a virtual session? If you can't answer those questions, or the answer is no, you're behind the curve and missing an opportunity.

2 You may want to consider going test-optional.

The disruption to standardized testing through ACT and the College Board has generated a lot of buzz around higher education and significant momentum for the "test-optional" movement. A couple of interesting data points showed that 42% of rising seniors say they are more likely to apply to a school that is "test-optional," while 48% said it makes no difference to them. For most institutions that are not truly selective, at least for the class of 2021, a move to test-optional will not have an adverse impact on application volume and might, in fact, help attract more interest.

College Choices and Communication Tactics

1 Understand your market and the ways in which you can disrupt it.

Most colleges and universities have local or regional footprints. COVID-19 has not had a significant impact, as of yet, on willingness to travel, according to this survey. More than half (53%) said their ideal institution was either in their hometown or within 150 miles. Only 18% said they were planning to attend a school out of region, including only 10% who are conducting a national college search. If you're like most schools drawing from within that regional footprint, there has never been a more important time to understand your position within that market and among your competitors. If you understand your market, you can develop a strong strategy to disrupt it and grow market share. This intelligence will inform messaging strategy for differentiation and tactical approach to marketing across all channels.

2 Ensure your website can delight, help build affinity within your audiences, and is optimized for search.

Rising seniors are relying more and more on college and university websites, with some 75% indicating the .edu as their top resource for connecting with schools. This is up from 66% one year ago. This data emphasizes the need for your website content and user experience to delight your audiences, not just deliver them information. It will be an avenue—*the avenue*—to create connection-building affinity. College websites aren't known for being user-friendly, but that has to change—and quickly. Your content strategy needs to evolve to deliver both distinct storytelling and relevant, valuable information that serves prospective students and their families through the process. It must be up-to-date on a daily basis, providing new and engaging content regularly, as well as easy access to RFI forms. It's also

critically important for your content to be optimized for search engine performance, as the research shows that rising seniors' #2 resource behind the .edu website is Google Search. Make sure you're building optimized content and populating page metadata aligned with early college search–related keywords so your website rises to the top of search results organically. In addition, paid search cannot be ignored as a vital piece to ensuring your institution shows up as a top result in Google when students are actively searching. It's also important to note that digital Display ads and social media advertising drives branded keyword search in Google and helps conversions. In fact, people are 70% more likely to convert on your website after seeing an ad, so making sure you have a good digital marketing outreach plan is critical.

3 Leverage the increased receptivity to digital advertising with hyper-targeted digital tactics.

As they visit college websites more, rising seniors are indicating increased receptivity to and engagement with digital advertising, no doubt because they're spending more time connected to devices and consuming streaming media than they ever have before. This represents a significant opportunity to reach and influence students with hyper-targeted digital tactics that will drive them to your website, where you can delight with your content and superior user experience. Notable tactics to leverage currently are Mobile Footprinting and OTT (Over The Top) video streaming. Mobile Footprinting allows you to "look back" 180 days to capture a student audience of mobile devices that was present at your target high schools, then deliver ads to those devices while also using them as a conduit to capture the IP address of student homes. You can then deliver Display ads to any device logged in to those networks, reaching students and influencers in their homes. OTT lets you leverage your video assets to reach students on Hulu and other paid TV streaming services. This platform has become increasingly potent in the past several months as students and families have been streaming more and more media in their homes. Additionally, the power and influence of social media advertising cannot be overlooked. With 51% of Gen Z reporting that they're using social media constantly—and almost 40% of rising seniors indicating social media is among their resources to seek out information about colleges—networks like Facebook, Instagram, and Snapchat should not be disregarded. Finally, YouTube is an extremely important platform to consider, arguably now during the pandemic more than ever. With 81% of teens using YouTube in the US, and with students spending more time at home and using YouTube daily for both discovery and learning as well as entertainment, this is a moment on which higher education marketers can capitalize. Beyond these specific tactics, it's important to develop a holistic omnichannel digital strategy that will be present at all stages of the college search, responsive to student behavior and delivering relevant messaging specific to who they are and where they sit within the enrollment ecosystem.

Financial Impact

1 Focus on need-based financial aid leveraging over merit-based discounting.

Mirroring what we saw in surveys of graduating seniors this spring, there has been a drastic decline in confidence in the ability to pay for college among rising seniors. Sadly, one in four students reported a parent being laid off, and nearly the same number has lost their own job. The economic impact of COVID-19 is going to have deep and lasting ramifications for an already broken and ineffective pricing and discounting system in higher education. Very few schools actually practice financial aid leveraging, which is the strategic distribution of aid to meet student need while also influencing their decision, based on many variables that indicate likelihood of enrollment. The majority of schools use formulaic merit-based discounting models that distribute financial aid dollars according to academic achievement levels, commonly a combination of grade point average and standardized test scores. This system is going to have to evolve rapidly away from merit-based discounting to need-based leveraging in order to meet the needs of the students who require additional financial support to access higher education.

2 It's highly recommended to revisit and even communicate your appeals processes for financial aid.

Should COVID-19 continue to be active and detrimental to the economic situation across the country throughout next year's cycle, doing this will be a strategic imperative. Ensure these parts of your admission operation are well conceived, documented, and marketed to the upcoming class.

3 Institute one-time awards if grant aid needs to be allocated above and beyond the current financial aid regimen.

Given the number of unknowns regarding treatments, vaccine availability, and general longevity of the COVID-19 pandemic in society, this may prove critical to making your class. Such aid can always be reissued for another year if needed but not taken away if the aid is extended for four years from the outset.

The Online Format Boomerang

1 **Colleges and universities must demonstrate the clear and detailed difference between the stopgap online experience delivered by high schools and what the further evolved experience will be like in college, a sector that has a longer history of delivering education online.**

Just as colleges and universities shifted coursework online this spring, high schools were doing the same, and rising seniors overwhelmingly were dissatisfied with the experience. Naturally, fewer of them have interest in an online format as they consider colleges and universities. Within the context of the real possibility that colleges will have to deliver at least a portion of their coursework in an online or hybrid format, these students will require some convincing. If your school's online course delivery was subpar this spring, it must be improved. And your plans for improvement have to be communicated clearly and in detail so prospective students can understand what they're getting into and be able to differentiate your institution's online or hybrid experience from that of your competition as well as what they experienced this spring.

About Our Sample

STUDENT VOICES

Using the nationwide CollegeXpress platform, Carnegie Dartlet sent a survey invitation to its high school rising senior user base on Monday, May 18 to evaluate their thoughts about COVID-19. Impressively, more than 1,500 students responded in under 48 hours. Students responded to a varied question set that included college search options, worries about competition with gap year students, and thoughts on online coursework. Without a doubt, these students had strong opinions to share. Giving them a space to respond to the outbreak, the survey garnered thousands of open-entry, written responses as well as the quantitative data reported here.

THE POWER OF 1,592 VOICES

Robust sample sizes allow for more options statistically in understanding and slicing data. More importantly, perhaps, it level sets the realities of the information. A sample is rarely perfect, so being able to see the amount of response in varying groups demographically is critical to understanding what can be most important to each group. Our demographics totals are reported here, and the breakout tables in this report allow for statistically relevant comparisons across groups.

OUR BREAKDOWN OF PARTICIPATION

GENDER

Female	69%
Male	29%
Transgender	1%
Other	1%

SOCIOECONOMIC STATUS

Below Average	40%
Average	41%
Above Average	19%

SCHOOL TYPE PREFERENCE

Public	69%
Private (Religious)	9%
Private (Non-Religious)	17%
2-Year College	5%

RACE (ALL THAT APLLY)

American Indian/Alaska Native	2%
Asian	11%
Black or African American	19%
Hispanic or Latinx	20%
Middle Eastern/North African	1%
Pacific Islander	1%
White	58%
Other	2%

LOCATION

Midwest	15%
Mountain West	8%
Northeast	22%
Heartland	16%
South	22%
West Coast	17%

For access to the full breakout tables, **visit this link**.

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The Power of Human Connection

Since 1983, Carnegie has been a leader in higher education marketing and communication. We activate the power of psychometrics to deliver original, industry-leading communication solutions that cause clients to move forward with confidence. The accuracy, approach, and statistical credibility of this psychometric study is just one example of how we propel client interests and drive enrollment. **You have goals, and we can partner with you in diverse ways to achieve them.**

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