Senior Fall Decision

THE AFTER-MAY 1ST COVID-19 STUDY

MAY 14, 2020

CARNEGIE
MARKETING AND ENROLLMENT STRATEGY

The latest word in senior response

Based on two congruent studies—the most recent being conducted after the May 1 deadline—we are pleased to offer you new insight into the minds of college-bound high school seniors. Bottom line: students are determined to go back to school; it's just a matter of "how."

STUDENTS ARE READY FOR THIS CHALLENGE. YOU SHOULD BE TOO.

Prospective college students are navigating a complicated situation this spring. Mass unemployment, high levels of uncertainty, lockdowns, and the struggles of online courses all loom while pivotal life moments like graduation and prom slip away.

And yet, students persist.

Carnegie recognizes the pain students are in and how that will be felt in the higher education industry. This report covers the results of two surveys of current high school seniors. Some of the information is surprising. Others may change strategies or offer hope. What is apparent immediately is that it's a good time to breathe. Hope is not lost.

HOPE IS NOT LOST

only 2%

OF STUDENTS HAVE PLANS TO DELAY PRESENTLY

42%

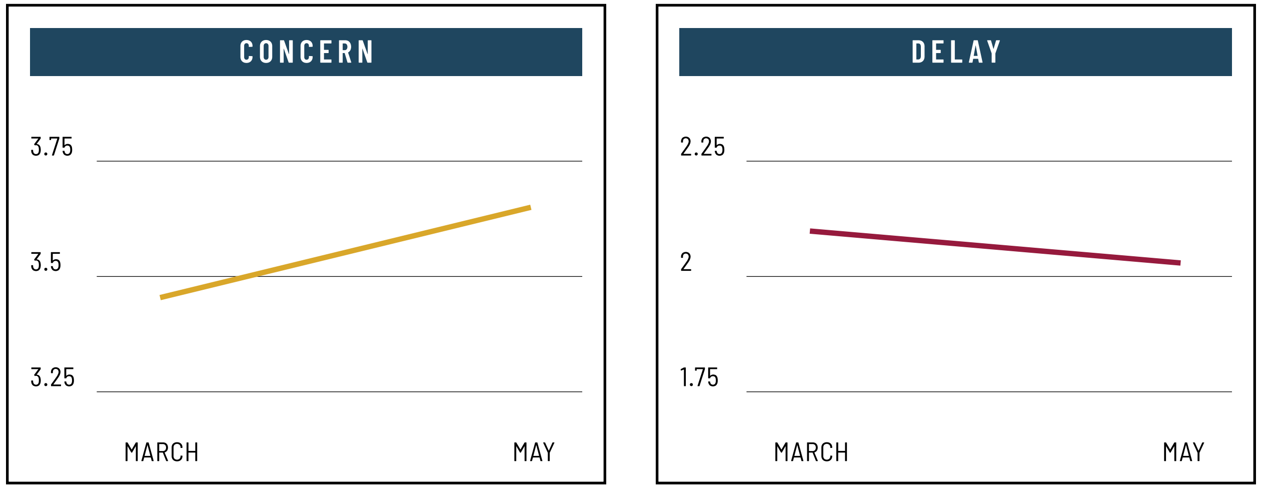
WILL NOT DELAY UNDER ANY CIRCUMSTANCE

While concern has risen, student determination holds

In the six weeks between surveys, the concern prospects have about COVID-19 negatively impacting their education increased significantly. About three in five respondents said they had "a lot" of concern or worse, while in March that number was around one in two. Additionally, the number of students who said they had little or no concern about COVID-19 dropped from 16% to 9%. Importantly, concern rose in almost every demographic group except for historically underrepresented populations who had greater concern in March that stayed more consistent into May.

Despite this shift, students are holding strong to their planned educational journey. Intent to delay did not increase from March to May, and in some groups actually dropped slightly. This can be attributed at least partially to the students who made commitments by May 1 feeling greater confidence in their choice than in March when there was greater uncertainty. Still, this fact suggests that while students may be more careful and discerning about the outbreak, they are not ready to drop their plans. Only 2% of students have plans to delay presently, and 42% will not delay under any circumstance (up from 34% in March).

CONCERN AND DELAY (5-POINT SCALE)



STUDENTS ARE HOLDING STRONG TO THEIR PLANNED EDUCATIONAL JOURNEY

A CAMPUS THAT PHYSICALLY OPENS
WITH SIMPLE SOCIAL DISTANCING MEASURES
IS LIKELY TO RETAIN 95% OF THEIR COMMITMENTS

HOWEVER, TIMING OF DECISIONS IS KEY.

THE LATER AN INSTITUTION WAITS TO MAKE THEIR FALL DECISION, THE MORE APPREHENSION STUDENTS HAVE.

33% of students may defer or cancel if classes go fully online

While the data suggests that few students are opting to delay, presenting fall format scenarios reveals the truth about deferrals: **students are more likely to delay if online classes become the norm. About one in three students is willing to defer or cancel their fall semester if schools go totally online.** However, simpler solutions—like virtual options for larger lecture classes while campus opens or social distancing with a return in the fall—score much higher.

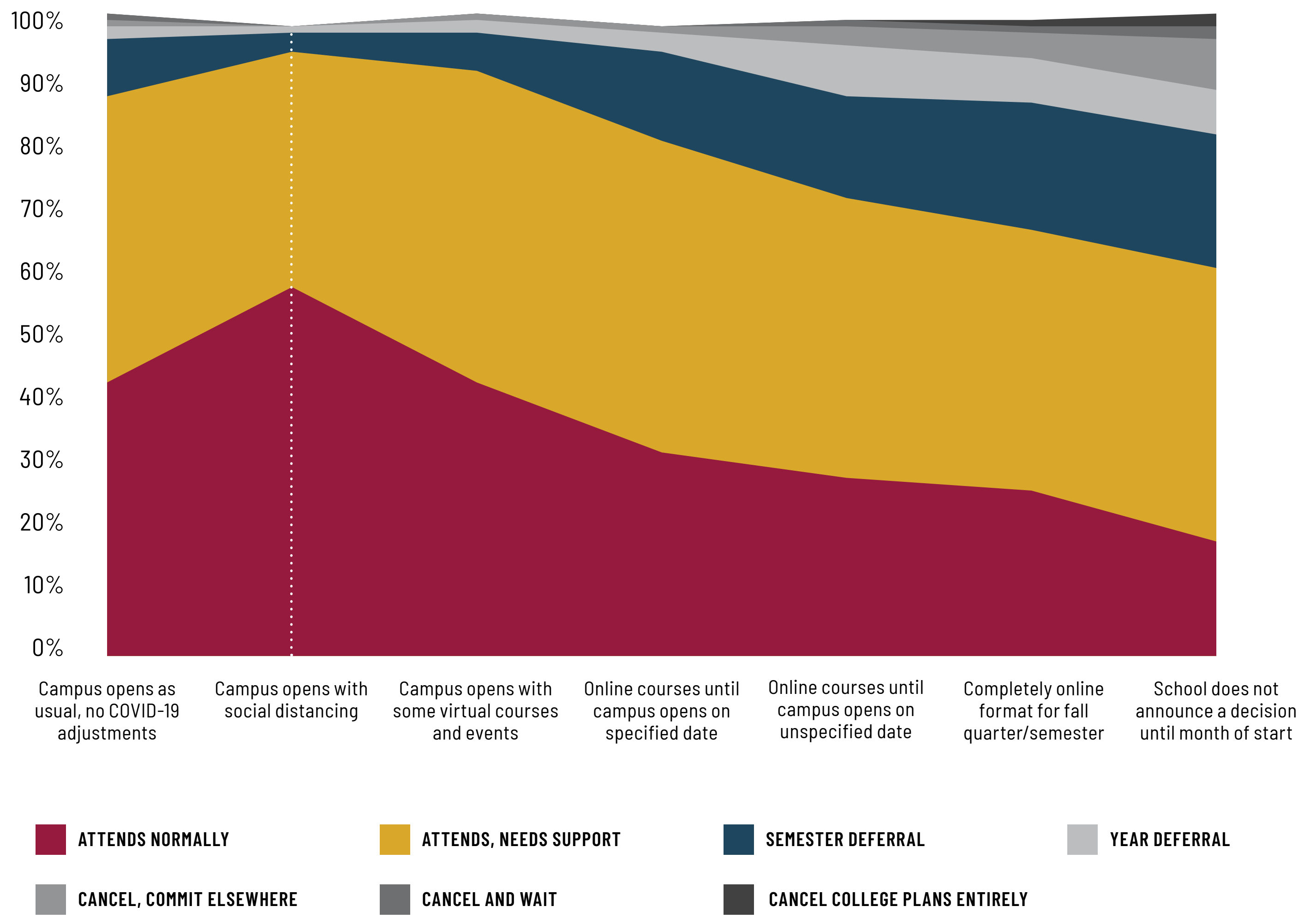
Fall Scenarios and Commitment Melt

Although many students have already committed to a school, the unprecedented COVID-19 situation raises the question of how many will keep those commitments through to fall. While the delay to education result suggests few are slowing down, presenting fall format scenarios reveals the truth about deferrals: **students are more likely to delay if online classes become the norm. About one in three students is willing to defer or cancel their fall semester if schools go totally online.** However, simpler solutions—like virtual options for larger lecture classes while campus opens or social distancing with a return in the fall—score much higher. This suggests that melt may be less of a concern than some other alarmist studies suggest. In fact, a campus opening with simple social distancing is likely to retain 95% of their commitments. However, timing of decisions is key. The later an institution waits to make their fall decision, the more apprehension students have.

Around 33% of students will cancel, wait, or defer if classes go completely online in the fall.

Of note, lower SES prospects were more likely to delay or cancel regardless of solution. White prospects are more likely to delay in the online situations but less likely to delay with an open campus. Community colleges may also experience a cross-directional flow. While many of the usual community college audiences are choosing to wait, some of those students who would normally attend a four-year institution may fill in those open spots. Online classwork also affects community college audiences the least, as many already have it as a primary option.

COMMITTED STUDENT COURSE OF ACTION BASED ON SCENARIOS



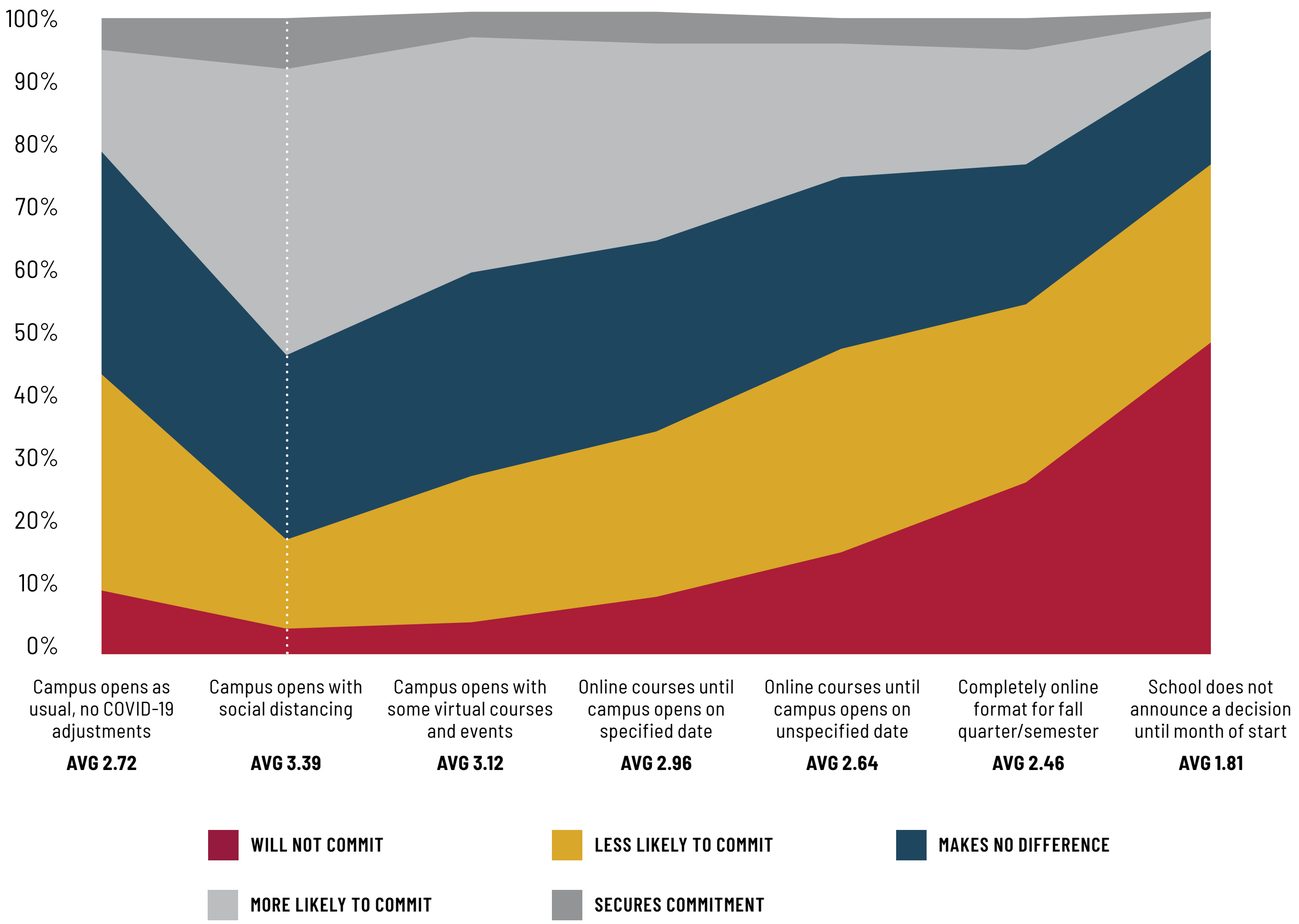
Fall Scenarios and New Commitments

For students yet to commit to a school, having a fall plan in place has been shown to be highly valued in other Carnegie research studies. After the May 1 deadline, we asked those who were still uncommitted how each scenario would influence their likelihood to select a school. The only two options with a result averaging above a neutral score were an open campus with social distancing and an open campus with some virtual options for large lecture courses. **More than half of students said their likelihood to commit to a school would drop if the school went entirely online, and three out of four are less likely to commit to a school without a solidified plan in place by the month classes begin.**

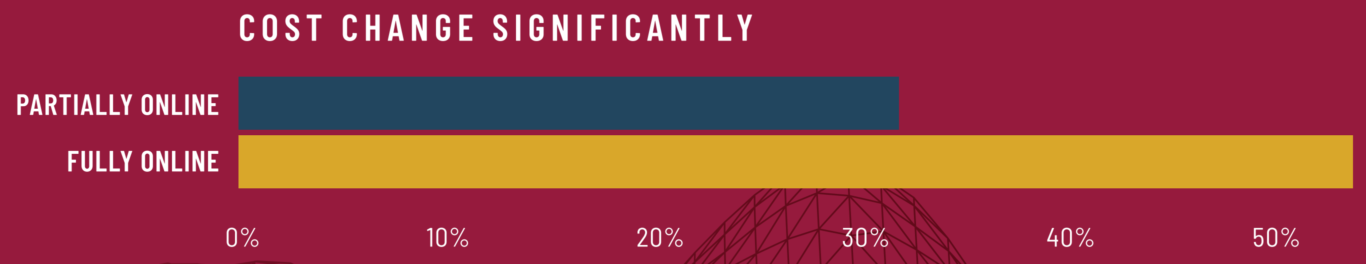
Delaying an announcement until the month of classes could result in a nearly 50% loss of your potential new commits.

There were few differences in response based on demographics for this question. However, non-religious private schools may have a harder time attracting remaining uncommitted students if they shift completely online for fall. Women are also less likely to commit if no plan is in place.

UNCOMMITTED STUDENT LIKELIHOOD TO SELECT SCHOOL BASED ON SCENARIOS



AN OVERWHELMING MAJORITY (95%) OF PROSPECTIVE STUDENTS SAID A MOVE TO ONLINE COURSEWORK, EVEN PARTIALLY, REQUIRES AT LEAST SOME CHANGE TO THE COST OF ATTENDANCE.



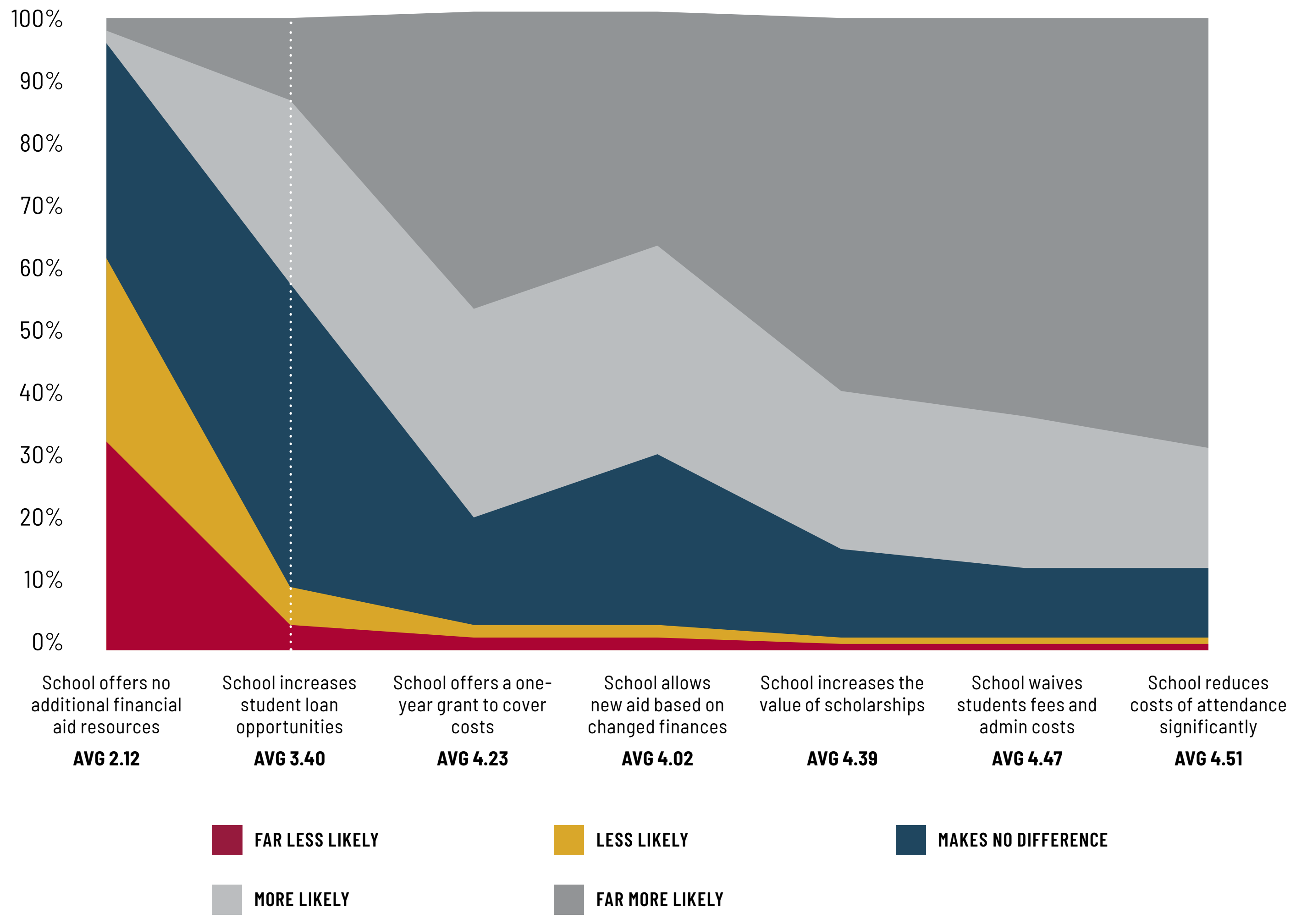
Cost Scenarios

The impact of format decisions is only one student consideration. Another is the cost of attendance due to the immense financial impact COVID-19 has had on families around the country. As such, scenario-based scoring was also introduced to evaluate whether a person will feel more or less comfortable attending school normally as a result of different financial actions taken by a school. **Nearly two-thirds of students, both committed and uncommitted, said that a school making no additional resources available makes them less likely to attend.** Adding additional student loan opportunities shifts many to a neutral standing. The other potential options—including a year-long grant, increasing scholarships, reducing costs, and subtracting fees—were all rated as increasing likelihood significantly.

Even a temporary financial offering like a one-year grant can significantly offset a school's losses.

Male and White audiences were less affected by these potential shifts. Female, Latinx, or low SES students were most motivated by these options. In fact, the single-year grant option moved low SES students into the "Far More Likely" to attend category at a two out of three rate—much higher than the average field, but indicative of how even a temporary fix would help some of the most financially strapped students.

COST SCENARIOS AND LIKELIHOOD TO ATTEND



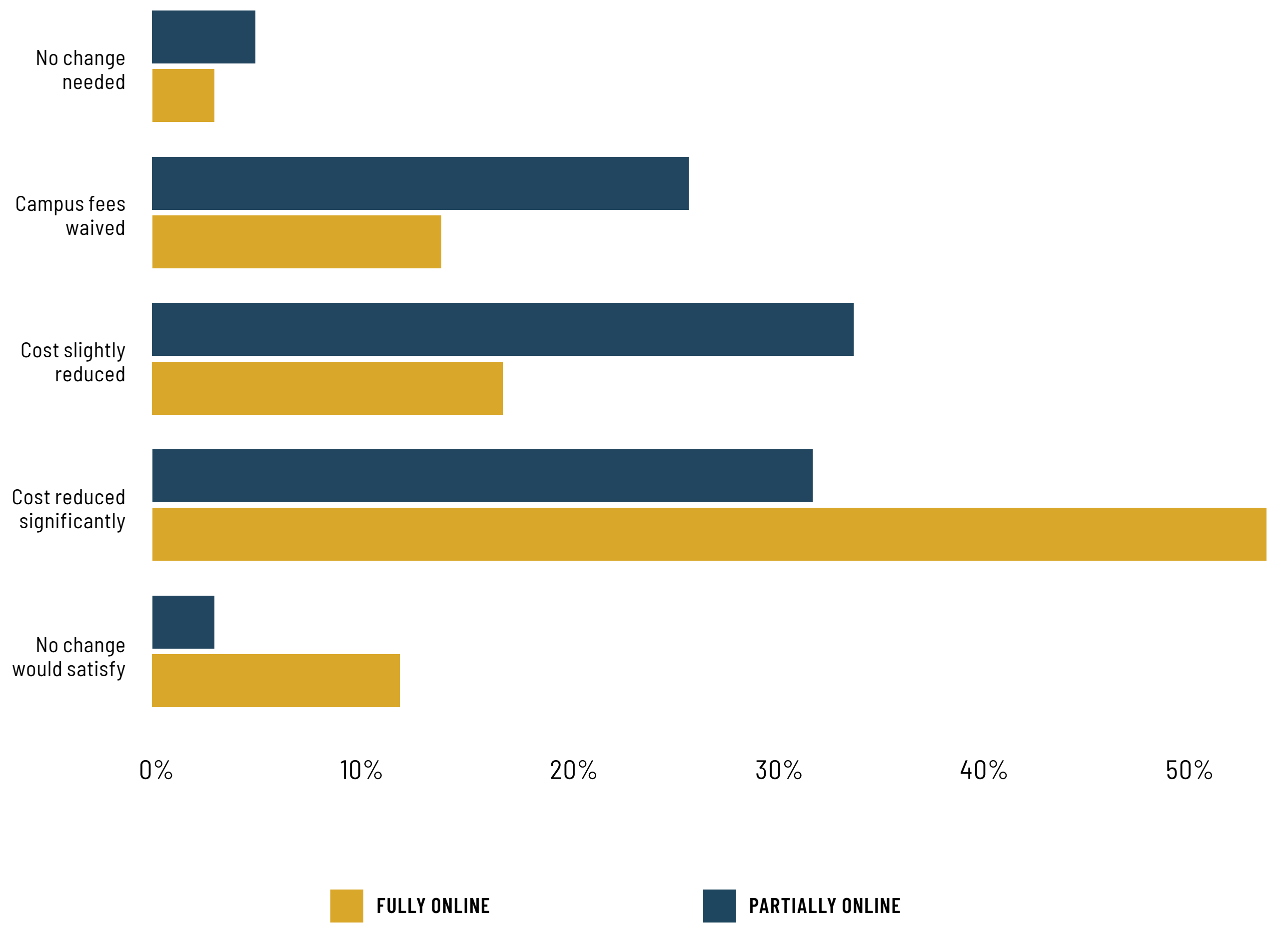
The Intersection of Cost and Online Coursework

An overwhelming majority (95%) of prospective students said a move to online coursework, even partially, requires at least some change to the cost of attendance. Respondents reacted to scenarios of a school going online for part of the fall semester or going online for the entirety of fall. In the case of a partial shift to online, only 3% of students said there was no way they could be satisfied about the value of their education. **About a third is looking for a slight reduction in cost, a third would seek a significant reduction in cost, and a quarter was satisfied with simply waiving campus fees associated with living on campus.** This did not differ much across audiences, though uncommitted students may keep a closer eye on this decision.

If going fully or evenly partially online, a change in cost or financial aid is critical.

The fully online scenario was more drastic, with 12% saying no change in price would make them satisfied with the value of online coursework. A majority (54%) said significant cost reductions would be needed, while both waiving fees and slight tuition reductions dropped to under one in five. The only significant demographic difference here was that low SES respondents were even more adamant about a financial shift based on online course offerings.

COST CHANGE EXPECTATIONS FOR PARTIALLY OR FULLY ONLINE FORMATS



50%

INTEREST IN LIVING ON CAMPUS HAS RETURNED TO ITS PRE-COVID SCORE, WITH NEARLY 50% SAYING

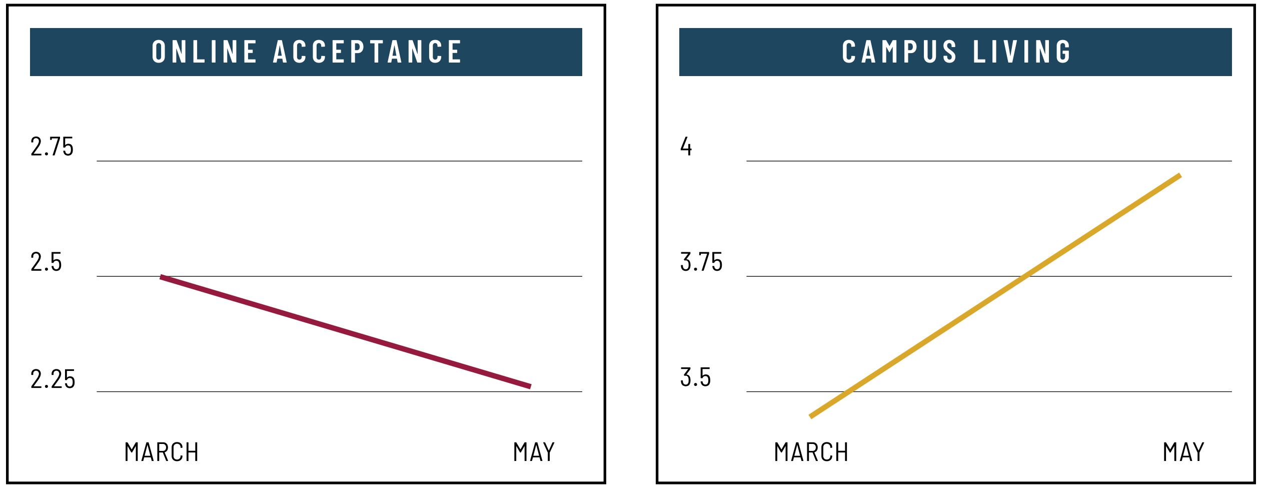
IT'S THE ONLY COLLEGE LIVING EXPERIENCE THEY WILL CONSIDER.

Student Opinions on Online Coursework and Campus Living Are Reverting to Pre-COVID Levels

Findings in March suggested that students were beginning to feel more open to online coursework and were less likely to be excited about living on campus. By May 1, these realities have reverted to nearly pre-COVID levels. Consideration of taking a majority of classes online has dropped a quarter of a point on a five-point scale—a significant mark. Qualitative entry quotes suggest this drop is at least partially due to students having poor online course experiences, while the lower score for committed students suggests those who made their choice did so partially on the promise of a campus experience. More than a quarter of students will not consider taking the majority of their coursework online at all.

Mirroring this, interest in living on campus has returned to its pre-COVID score, with nearly 50% saying it's the only college living experience they will consider. This is up more than half a point on a five-point scale from March. Every single demographic group had a significant rise in interest of living on campus. Committed students have a very high interest score, suggesting again that going to campus, even with some distancing or other measures in place, is critical to their college experience.

ONLINE COURSEWORK ACCEPTANCE AND CAMPUS LIVING INTEREST (5-POINT SCALE)



March Online Acceptance Score: 2.50
May Online Acceptance Score: 2.26

March Campus Living Score: 3.37
May Campus Living Score: 3.91

MARCH AVG

2.89

Confidence Still Persists

DESPITE THE CHANGING SITUATION AND DIRE IMPACT OF COVID-19 ON THE COUNTRY, STUDENT CONFIDENCE IS HOLDING STEADY.

MAY AVG

3.00

Respondents indicated a slightly higher score in confidence for staying on track than in March. Though not a statistically significant leap, the fact that students are still pushing forward against all odds is promising.

Anxiety About Orientation and Communication Needs Are Steady

Much like in March, the anxiety about an on-campus orientation is noted highly in about one out of five respondents. About 15% have no fears, while the majority say they only have some or slight fears. **This lack of movement suggests that having optional and robust online orientation measures in place will help many students.** Fears did raise more among Asian audiences but dropped for those in the Mountain West and Heartland or those who intend to go to a private religious school.

At the same time, colleges can continue to expect that students want more communication than previous cycles, though the amount has increased only slightly since March and not by a statistically significant margin. About a quarter want multiple updates from their school of choice each week, though a plurality (40%) say that once a week is preferred. Interest in communication increased for African American students from March to May, as well as for those intending to go to a public school. Careful consideration toward overload and platform choice, as well as providing only useful and new information, can foster a more healthy pipeline.

ORIENTATION ANXIETY (5-POINT SCALE) AND COMMUNICATION NEEDS (6-POINT SCALE)

ORIENTATION

NOT AT ALL NERVOUS	SLIGHTLY NERVOUS	SOMEWHAT NERVOUS	HIGHLY NERVOUS	WOULD NOT ATTEND
15%	30%	34%	15%	6%

COMMUNICATION FREQUENCY

ONLY WHEN ASKED	MONTHLY	EVERY OTHER WEEK	WEEKLY	MULTIPLE PER WEEK	DAILY
6%	6%	14%	40%	28%	7%

March Orientation Anxiety Score: 2.70

May Orientation Anxiety Score: 2.66

March Communication Needs Score: 3.87

May Communication Needs: 3.97

Change of Commitment Dates Was Erratic but Mostly Appreciated

Nearly three in four prospects said at least one of the schools they were/are considering moved their commitment date beyond May 1. However, because it was rarely all their schools of interest (12% at the time), the situation was somewhat complicated. In the qualitative responses, many students noted having to make their choice despite some schools moving deadlines back because of one institution that did not. Others noted that a lack of an extension blacklisted a school from their choices, even if they made the decision by May 1 anyway.

This outlook was reinforced with a question about opinions on changed commitment dates. A third of all respondents said a change was "highly favorable," while only 8% saw it unfavorable in any way. Shifting the date was seen as most favorable from minority audiences, those with lower SES, and especially those who were still uncommitted as of the survey. It's important to note that less than 10% of those who did commit by May 1 had a negative outlook toward institutions making the change.

COMMITMENT DATE CHANGE STATUS (5-POINT SCALE) AND REACTION OUTLOOK (6-POINT SCALE)

ALL DATE CHANGE STATUS

AUDIENCE	NONE MOVED DATE BACK	MORE DID NOT THAN DID	ABOUT HALF AND HALF	MORE DID THAN DID NOT	ALL MOVED DATE BACK
ALL	24%	22%	21%	21%	12%

ALL STUDENT REACTION

AUDIENCE	HIGHLY UNFAVORABLY	SLIGHTLY UNFAVORABLY	NEUTRAL	SLIGHTLY FAVORABLY	HIGHLY FAVORABLY
ALL	5%	3%	42%	17%	33%

REACTIONS COMPARED COMMITED TO UNCOMMITED

AUDIENCE	HIGHLY UNFAVORABLY	SLIGHTLY UNFAVORABLY	NEUTRAL	SLIGHTLY FAVORABLY	HIGHLY FAVORABLY	AVG
COMMITED	5%	4%	45%	17%	29%	**3.62**
UNCOMMITED	5%	2%	19%	14%	60%	**4.23**

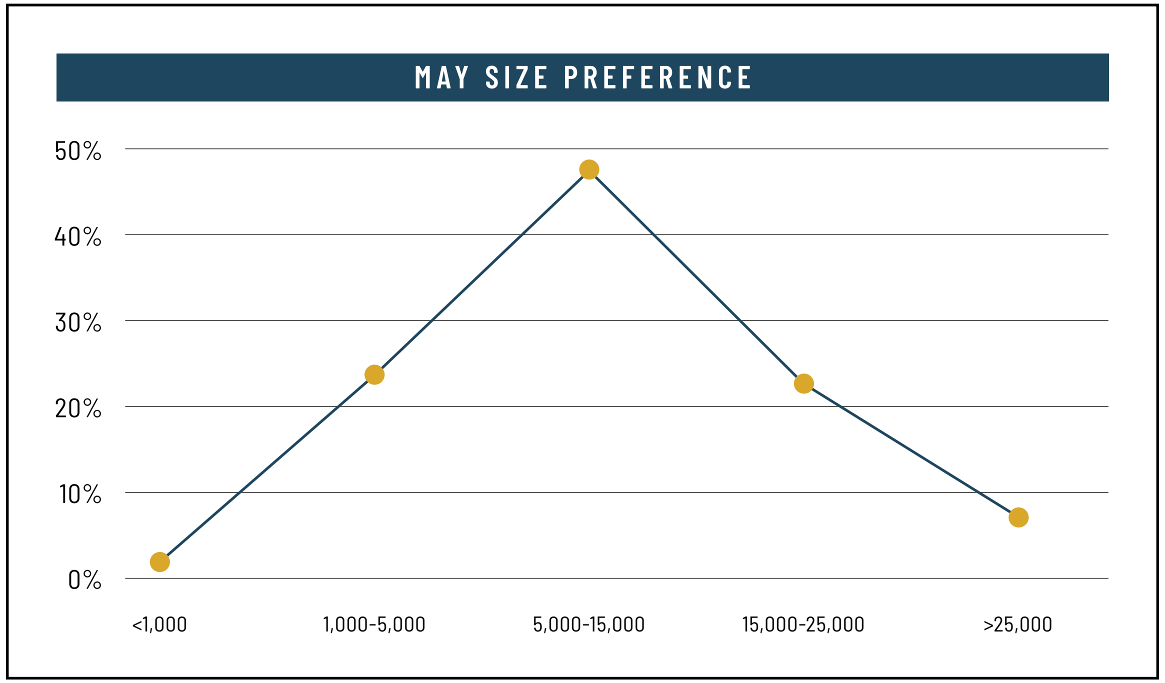
Some School Choice Preferences Are Changing, Others Reverting

About two-thirds of students said COVID-19 had no impact on their opinion about the ideal distance from home an institution would be. However, the remaining third was nearly all more interested in staying closer to home. This was truer of uncommitted students, so the remaining catch basin for enrollment is getting slightly smaller. Those who wanted a closer experience cited a need to be near family in times of crisis and the potential savings since low SES prospects were also more likely to say they wanted to stay closer to home as a result of COVID-19.

In March, many students had interest in attending a smaller school than before the outbreak occurred. However, this score has rebounded to pre-COVID levels, with a nearly perfect bell curve on either side of midsize institutions. This shift back occurred with almost every demographic group.

LOCATION PREFERENCE AND CHANGE IN SIZE PREFERENCE

LOCATION					
AUDIENCE	FAR MORE INTERESTED IN CLOSE	SLIGHTLY MORE INTERESTED IN CLOSE	COVID-19 MADE NO DIFFERENCE	SLIGHTLY MORE INTERESTED IN FAR AWAY	FAR MORE INTERESTED IN FAR AWAY
ALL	16%	16%	63%	3%	2%



Top Findings at a Glance

1 **Students are concerned about COVID-19 impact to format, but they are determined to be in school this fall.**

Students are more concerned about the impact of COVID-19, but their determination not to delay has not changed.

2 **So much hinges upon a school's decision to bring students back on campus this fall—both format and finances.**

The likelihood of committed students changing their minds to defer—and uncommitted students to sign a letter of intent—is critically influenced by the decision your institution makes for the fall semester regarding both opening campus and offering financial incentive.

3 **Online learning is not worth as much to students as in person.**

Students do not feel they should pay the same amount for an online course as compared to one in-person.

4 **The bottom line is that students desire to be back on campus. If doors open, students will come.**

Online course interest has fallen back to pre-COVID levels, while interest in campus living has risen back to pre-COVID levels.

5 **The May 1 deadline move was universally favorable.**

Not all students had their school options move commitment dates beyond May 1, but it was universally recognized as a favorable decision by prospects, especially those still making a decision.

6 **Students are resilient.**

Their confidence has not swayed since March.

Where This Data Comes From

On March 19, we launched a prospective student needs survey focused on the COVID-19 outbreak with high school seniors from around the country. The response was overwhelming. Students were ready to talk, and more than 4,800 participated in the online survey. Six weeks later, timed strategically after the May 1 commitment date, we went back to our audience and collected new data to ask about unique scenarios moving forward and to measure change over time on some of the most important measures for our March survey. The result is this report, as well as a data table supplement that includes more than 20 breakouts by demographic and school interest factors.

WHAT IS CHANGE OVER TIME ANALYSIS?

When considering research, some of the most powerful insights originate from analyzing opinions at two different time periods. The timing is critical. Carnegie's first survey was conducted at the height of the first rise in concern over COVID-19, along with social distancing and lockdown measures. Now, our follow-up survey looks at audiences after the crucial May 1 college decision deadline. A shorter window would miss the apex of both moments, while a longer window would lose important time for decision-making.

Change over time analysis is not simply comparing a percentage at time A to time B. This ignores latent factors of change and makes assumptions about different audiences within the survey. Using robust analysis of covariance using the first time point as a predictor allowed for a comparison of March to May to have indicators of statistical significance. Without this, there would be no indication if a drop in 5% is actually due to a change in opinions or pure chance based on sampling. Carnegie believes in a depth of analysis that offers trust beyond simply "running the numbers." Our data tables always present statistical significance confirmation, and our insights take cues from what is truly significant rather than just the direction of the wind.

4,800

MARCH PARTICIPANTS

+

2,800

MAY PARTICIPANTS

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

Our Prospective Student Audience

For both surveys, March and May, Carnegie sought the help of their prospective student users of the CollegeXpress platform. On May 4, nearly 3,000 students gave us follow-up data and information. In terms of research, this high level of responses allows for demographic breakouts and a wide range of statistical tests to help prove the validity of results across a larger audience. Perhaps more important than the numbers, our samples at both time points were nearly identical demographically.

WHY DOES A SIMILAR SAMPLE MATTER?

When doing an analysis over time, having two congruent samples is key in reporting overall statistics that come from consistent sourcing. The breakouts performed in both rounds of surveys show why it's so important: different types of people answer questions in a different way. Having the same demographic makeup in two surveys allows for a comparison of apples to apples. Transparency in sampling, both from the source of sample and demographic breakouts, is crucial for determining the importance and insights of findings for each institution individually. If a certain demographic group is critical to the enrollment efforts of your institution, it is highly suggested to also refer to our demographics breakout tables while reading this report for important context. A report without a robust explanation and transparency in its sample cannot be interpreted with context.

OUR BREAKDOWN OF PARTICIPATION

	MARCH	MAY
GENDER		
Female	67%	68%
Male	30%	30%
Transgender	2%	1%
Other	1%	1%
SOCIOECONOMIC STATUS		
Below Average	42%	40%
Average	38%	37%
Above Average	20%	23%
SCHOOL TYPE PREFERENCE		
Public	67%	65%
Private (Religious)	10%	11%
Private (Non-Religious)	13%	15%
2-Year College	10%	9%

	MARCH	MAY
RACE (ALL THAT APLLY)		
American Indian/Alaska Native	2%	2%
Asian	11%	12%
Black or African American	10%	13%
Hispanic or Latinx	18%	19%
Middle Eastern/North African	2%	2%
Pacific Islander	1%	1%
White	57%	59%
Other	1%	2%
LOCATION		
Midwest	16%	17%
Mountain West	9%	8%
Northeast	25%	25%
Heartland	15%	14%
South	17%	18%
West Coast	18%	18%

HAVING TWO CONGRUENT SAMPLES IS KEY IN REPORTING OVERALL STATISTICS THAT COME FROM CONSISTENT SOURCING

CARNEGIE

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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