Fall 2021 COVID-19 Impact

THE SPRING COMPARISON STUDY

APRIL 2021

CARNEGIE DARTLET™

THE POWER OF HUMAN CONNECTION

FALL 2021 IS NEARLY HERE

The Class of 2021 has spent their senior year in unprecedented circumstances—for many, their final year of high school has been fully virtual. Carnegie Dartlet wanted to understand the effects this experience had on their intentions for higher education and provide strategic insight into how to reduce melt and adapt to the needs of the incoming freshman class.

CONTINUED COVERAGE OF FA-21

Carnegie Dartlet has been monitoring trends in enrollment behaviors for college-bound students since the start of the pandemic. In March 2021, Carnegie Dartlet gathered new survey responses from more than 4,100 fall 2021 prospects from across the country utilizing the CollegeXpress platform. In this report, we'll provide a third update on the opinions of the Class of 2021, following our previous studies in May and October 2020. We'll also provide insight into how their opinions and intentions have changed over time, and how they compare to that of the Class of 2020.

COVID-19 VACCINATION

65% of students are certain they will get vaccinated for COVID-19, while only 12% are prepared to refuse.

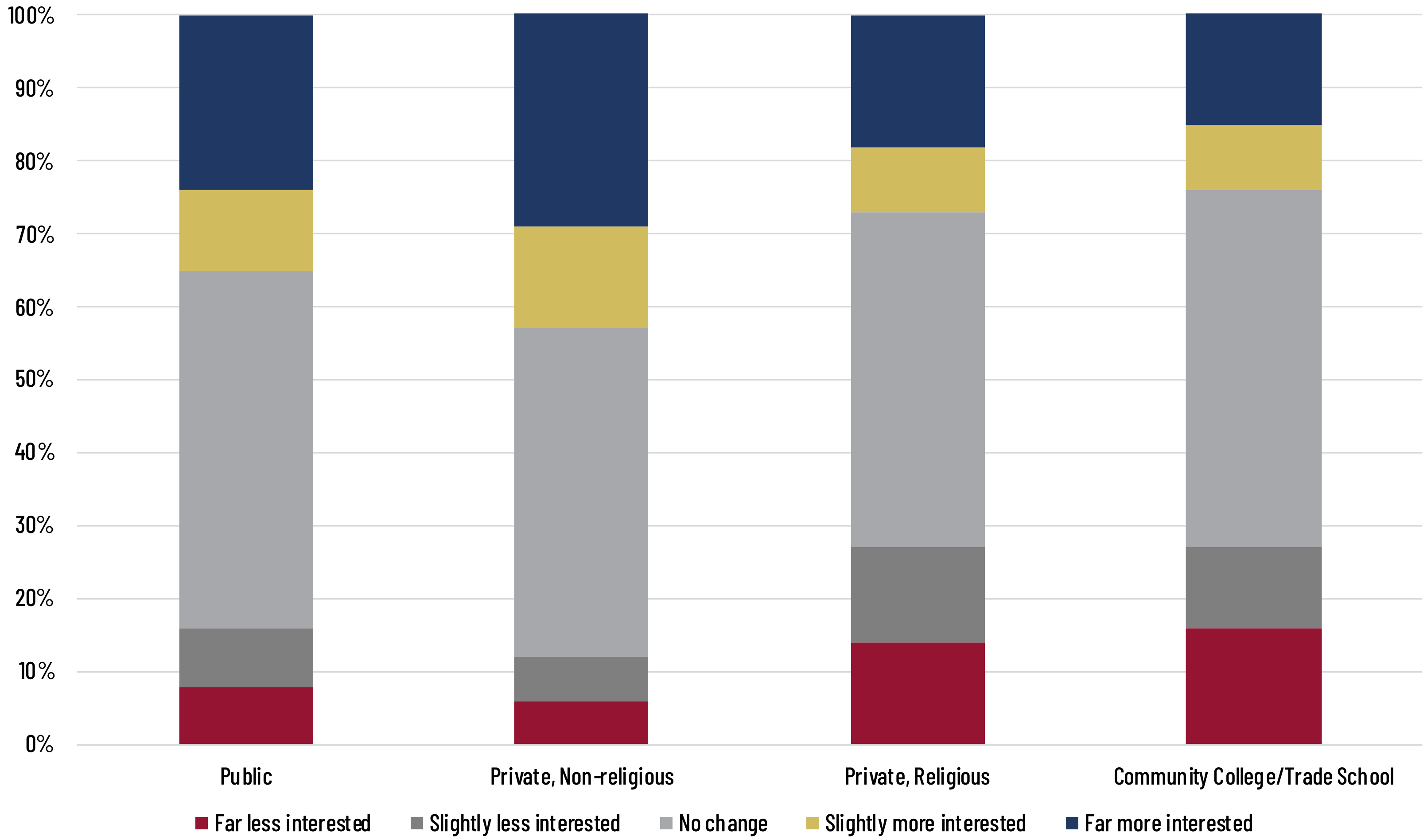
22% ARE UNSURE AND 1% ARE IMMUNOCOMPROMISED AND CANNOT BE VACCINATED.

While men in our study are more likely to want to be vaccinated than women, people of Asian descent are the most likely to say yes to the vaccine—83% have had or want the vaccine. White students were the most likely to say no at 15%. Black students are the most hesitant: 34% say they have not yet decided.

If a prospective school required vaccination for all medically eligible students, faculty, and staff, 34% of seniors would be more interested in that school.

Another 50% of students say this requirement wouldn't change their interest. Students interested in private (non-religious) or public schools view this requirement more favorably than students interested in private (religious) schools and community colleges/trade schools. Students planning to be vaccinated viewed this requirement very favorably. Those not planning to be vaccinated were strongly opposed to this requirement, with 73% saying they viewed this unfavorably.

REACTION TO VACCINE REQUIREMENT BY INTENDED COLLEGE TYPE

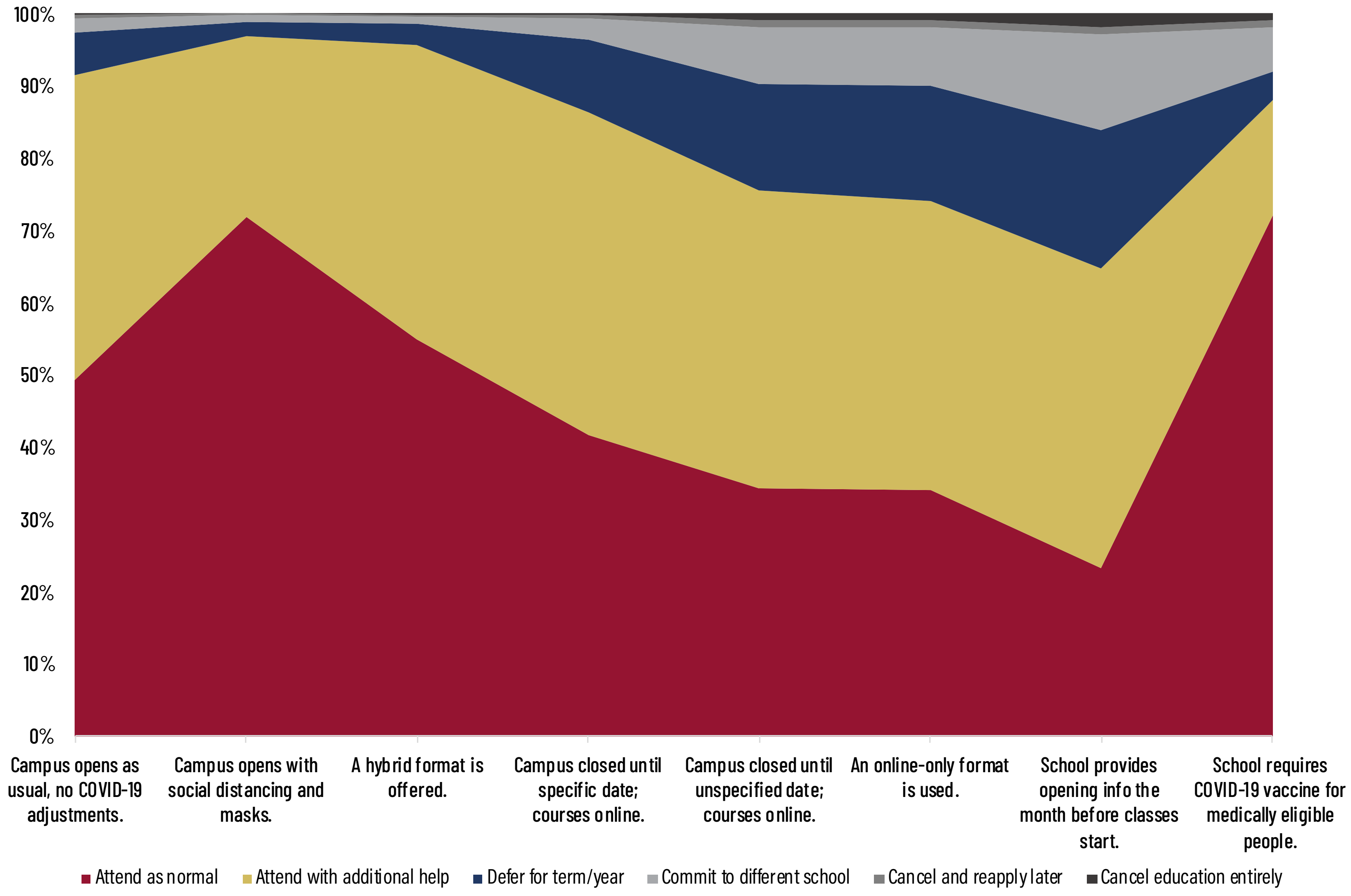


Regarding campus opening, scenario mapping further suggests a vaccine requirement is acceptable to many students. However, the option of social distancing and using masks had nearly the same "attend as normal" percentage while resulting in fewer planned cancellations or deferrals.

Students, both committed and uncommitted, strongly prefer a campus opening with social distancing and mask requirements. Generally, students reported they would be willing to attend as normal or with additional academic support as long as institutions were specific about when they would reopen, with last-minute decisions being unpopular but acceptable with additional support. Ambiguous opening dates were the most likely to lead students to different schools or to defer.

Uncommitted students were more likely in general to indicate they'd need additional academic support than committed students and also were far more likely to defer for a semester or an academic year.

COMMITMENT AND ATTENDANCE ACTIONS BY SCENARIO



Only 2 in 5 students had fully committed to a school by mid-March.

This amount (42%) is about 10% lower than the same time last year for the Class of 2020 (53%). A higher proportion of White students have committed already compared to students of color, and well over half of students surveyed have not yet made a commitment. This presents a unique opportunity for institutions to adapt their strategy to the needs of their prospects.

2.35	2.14	6.21	7.19
CLASS OF 2021 CAMPUS VISITS	EARLY APPLICATIONS BY OCTOBER 2021	INTENDED APP TOTAL IN OCT. 2021	ACTUAL FA-21 APPLICATIONS

The Class of 2021 had fewer early applications than most cycles and reported an intention to apply to fewer schools (6.21 versus 6.92 pre-pandemic). However, by this report, the actual applications reported by our sample is actually slightly higher than a similar sample in 2019 (7.19 versus 6.74).

While women have visited more campuses, men have applied to more. Similarly, students of color, on average, have visited fewer campuses than their White peers but have applied to more schools. As confidence in affording higher education increases, so does the number of campuses visited—but there is no similar trend in applications. The further students intend to go for their higher education experience, the more schools they apply to—intending to stay local resulted in an average of 5.46 schools to an average 8.62 for those with national interest. Most notably, students who have already committed applied to an average of 4.81 schools compared to an average 8.86 for uncommitted students.

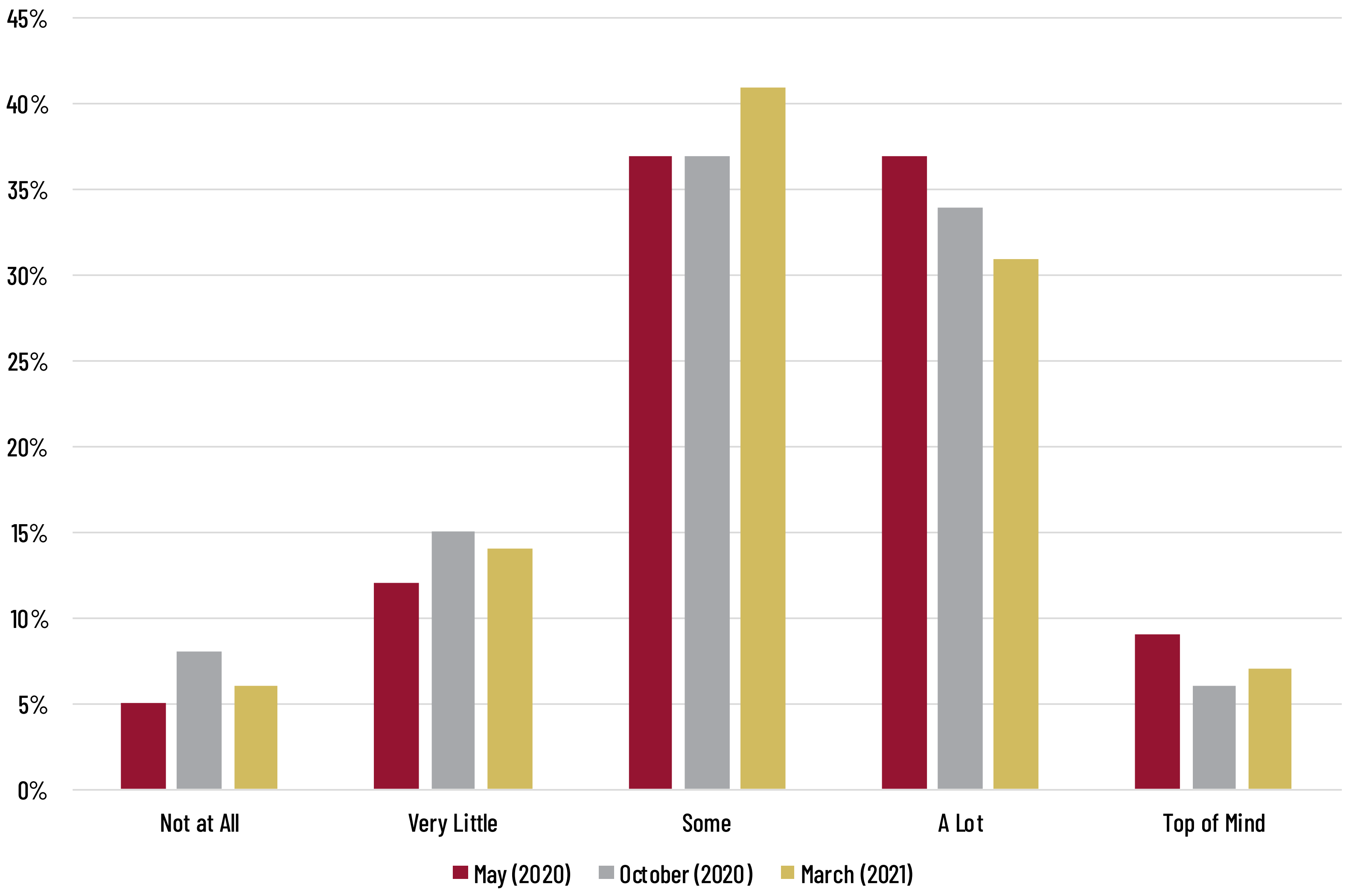
Despite concerns, students are not likely to delay.

Fewer than 3% of the Class of 2021 says an enrollment delay due to COVID-19 is likely, compared to more than 8% from the Class of 2020 at this time last year. More than half of students (56%) said nothing will delay them, up by 13% from the Class of 2020.

Concern about COVID-19 was highest last May for the Class of 2021, with an average concern level of 3.33 on a 5-point scale. This dipped slightly to 3.17 in the fall and has remained steady this March at 3.20. This concern is far higher among women than men; nearly 10% of men said they were "not at all" concerned compared to 3% of women. White students are substantially less concerned than students of color. Financially confident students are far less concerned about the effects of the pandemic than their less confident peers.

Although 26% of students say their GPA has fallen during the pandemic, **94% are confident they'll graduate high school on time**. Despite the hardships of the pandemic, the Class of 2021 has proven their resiliency and determination to succeed.

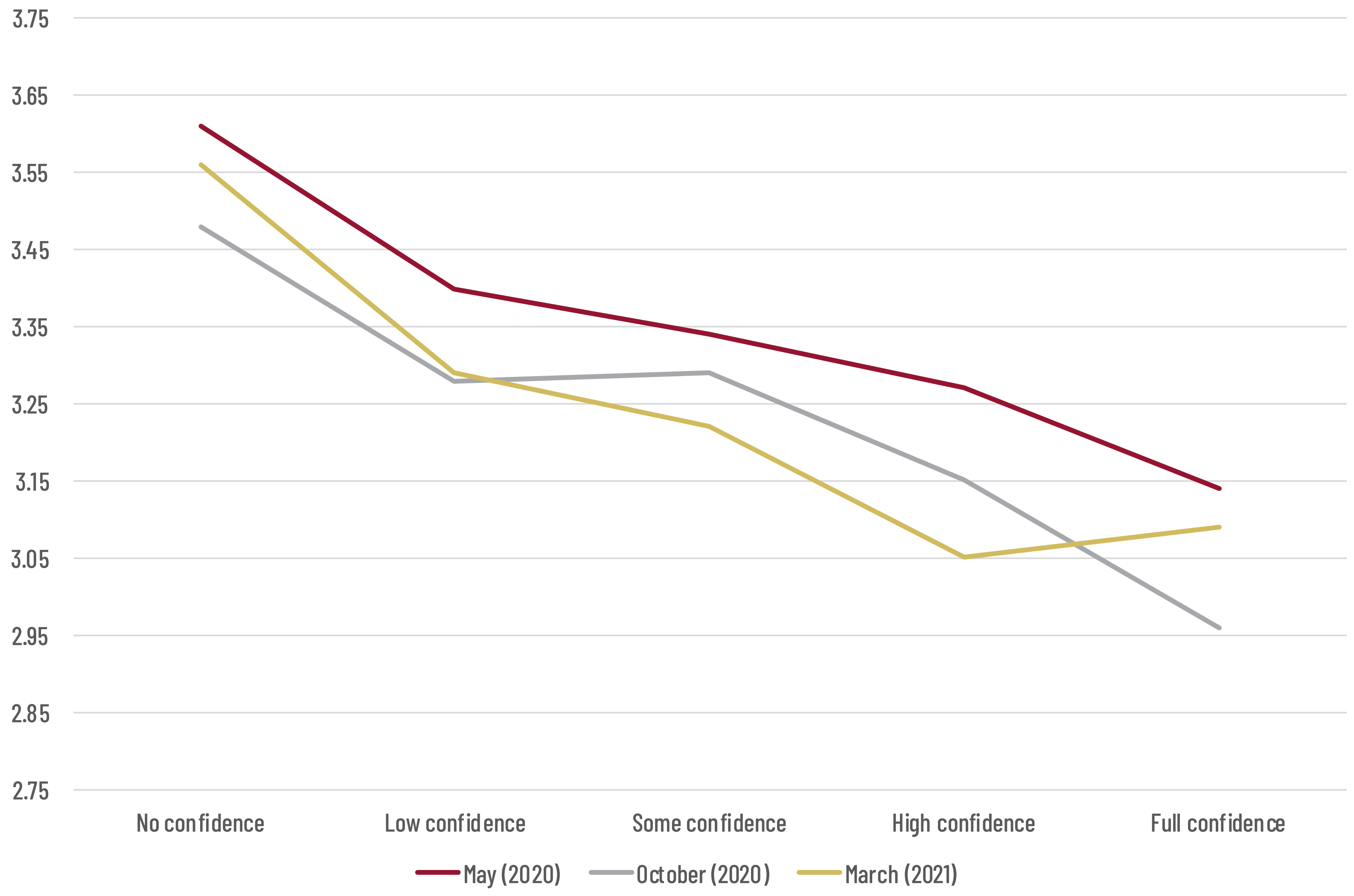
CONCERN REGARDING COVID-19'S IMPACT ON HIGHER EDUCATION



17% of seniors have no confidence that they can afford higher education. Just 6% are completely confident they can afford it.

This financial insecurity influences perceptions of the pandemic. Those who have greater worries about paying for college also see the pandemic as a whole being more influential and concerning than those who are still financially secure. This trend has been consistent since we started gathering data in May 2020 for this class.

LEVEL OF CONCERN BY CONFIDENCE IN PAYING FOR SCHOOL



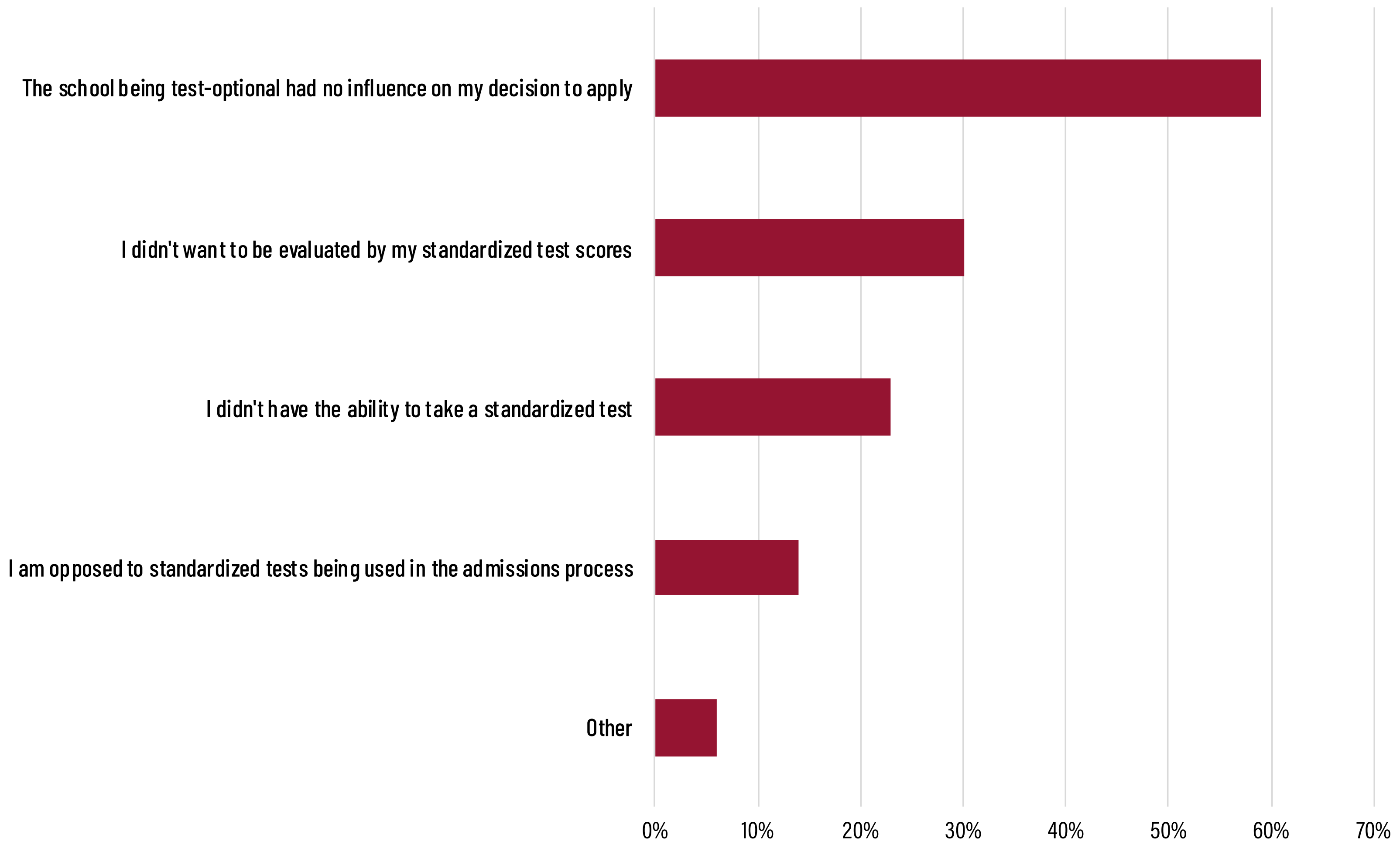
Most (94%) standardized testing took place in person despite the pandemic.

54% OF THE SAMPLE TOOK A STANDARDIZED TEST DURING THE PANDEMIC. OF THOSE, ONLY 6% OF OUR RESPONDENTS' TESTING WAS VIRTUAL.

84% of students said they applied to a test-optional school. While this is an all-time high, it is likely due to the fact that many more schools became test-optional in the past year. Enthusiasm for test-optional is greatest among marginalized groups.

We also asked participants why they applied to test-optional schools, with nearly 60% saying it was the result of a school they already wanted to attend being test-optional rather than a great influence to apply. In the qualitative responses, those who selected "other" indicated many barriers to test taking were logistical—they couldn't find a seat at a testing site, lost access to test prep, or simply couldn't afford it. It's unsurprising, then, that nearly a third of students said they didn't want to be evaluated by their test scores, and almost 15% opposed test use in the admission process. Generally, those in marginalized groups (students of color and those with little financial confidence) were more likely to select those options.

REASONS TO APPLY TO TEST-OPTIONAL SCHOOLS



59%
MAY 2020
IMPACT

58%
OCTOBER 2020
IMPACT

55%
MARCH 2021
IMPACT

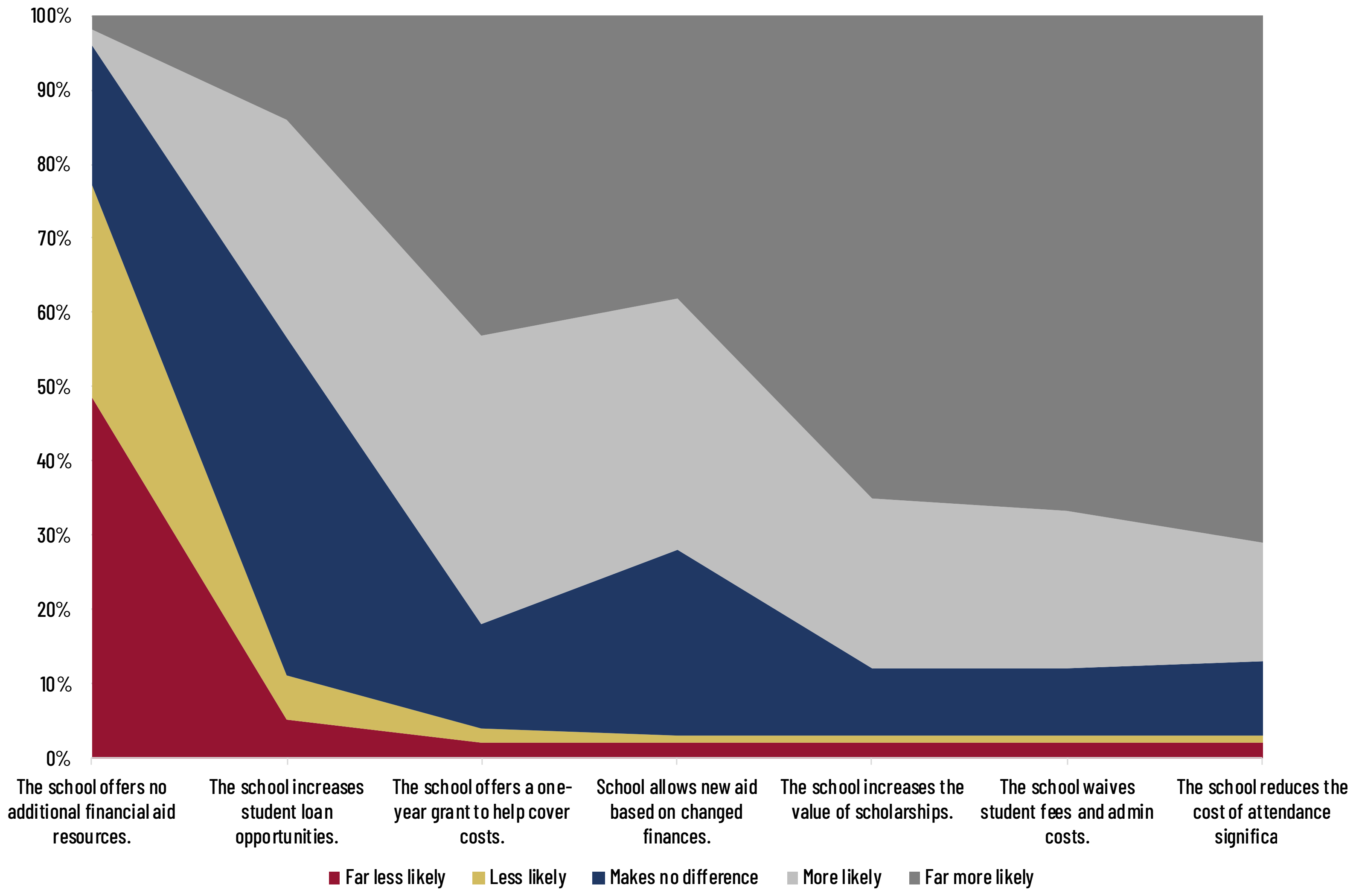
The financial impact of COVID-19 cannot be overstated. As cost of attendance remains high or even increases, students are increasingly concerned about the value of their education. **More than half of participants in the study reported having some type of a significant financial hit due to the pandemic.** This amount is approximately the same as our previous studies. Consistent with findings from the Department of Labor, women and students of color were more likely to be affected by financial hardships in general.

Nearly half of the Class of 2021 is far less likely to attend a school if it offers no additional financial aid resources due to the pandemic, up nearly 20% from the Class of 2020.**

Offering no additional aid to prospective students based on COVID-19 impact all but guarantees they will seriously consider other schools. While trends are similar across the two classes, the Class of 2021 expects and likely needs more aid than the Class of 2020.

While men were most likely to attend as normal regardless of additional aid, women responded more favorably than men to all additional aid options. Significantly reducing the cost of attendance motivated uncommitted students and students with little or no confidence in their ability to afford higher education to say they were far more likely to attend as normal.

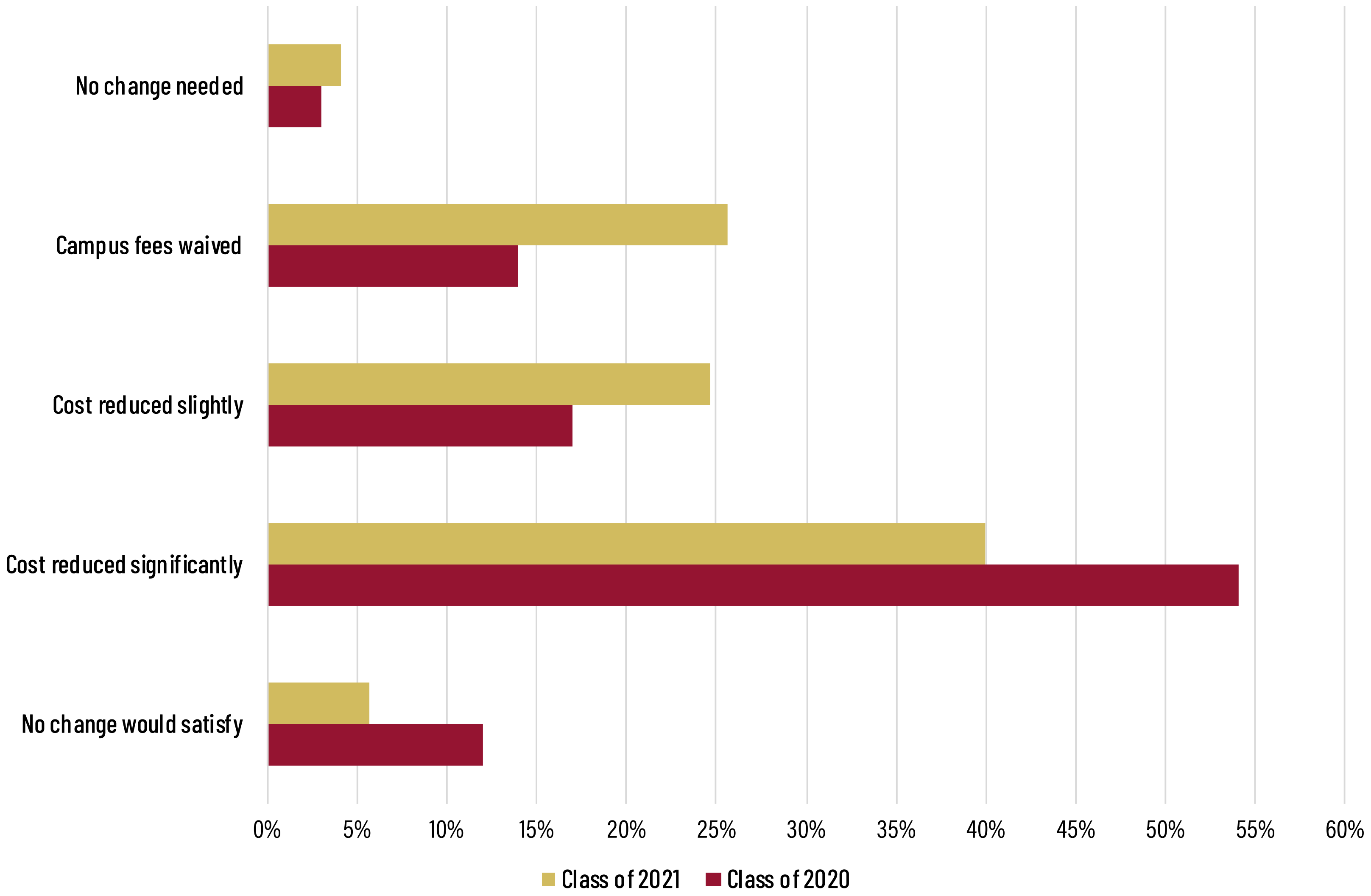
COST CHANGE SCENARIOS AND LIKELIHOOD TO ATTEND



Although most schools have plans to be in person in the fall, schools offering online programs should be aware of a perceived value differential for virtual learning. Echoing the findings for the Class of 2020, **95% of the Class of 2021 want at least some cost reduction if coursework takes place entirely online**. The Class of 2021 was less demanding than the Class of 2020 regarding the size of the cost reduction they'd find acceptable, but only 4% said they'd be happy with no change in cost. About a quarter were looking for a slight cost reduction, and another quarter were looking for waived fees.

Regardless, a plurality of students (just under 40%) wanted a significant cost reduction. White students wanted the largest cost reduction. Those with no confidence in their ability to afford higher education and, interestingly, those with full confidence were looking for the largest reduction in cost. Those looking to attend a private school regardless of religious affiliation were the most likely to claim that no change would be satisfactory.

COST CHANGE EXPECTATIONS FOR A FULLY ONLINE EXPERIENCE

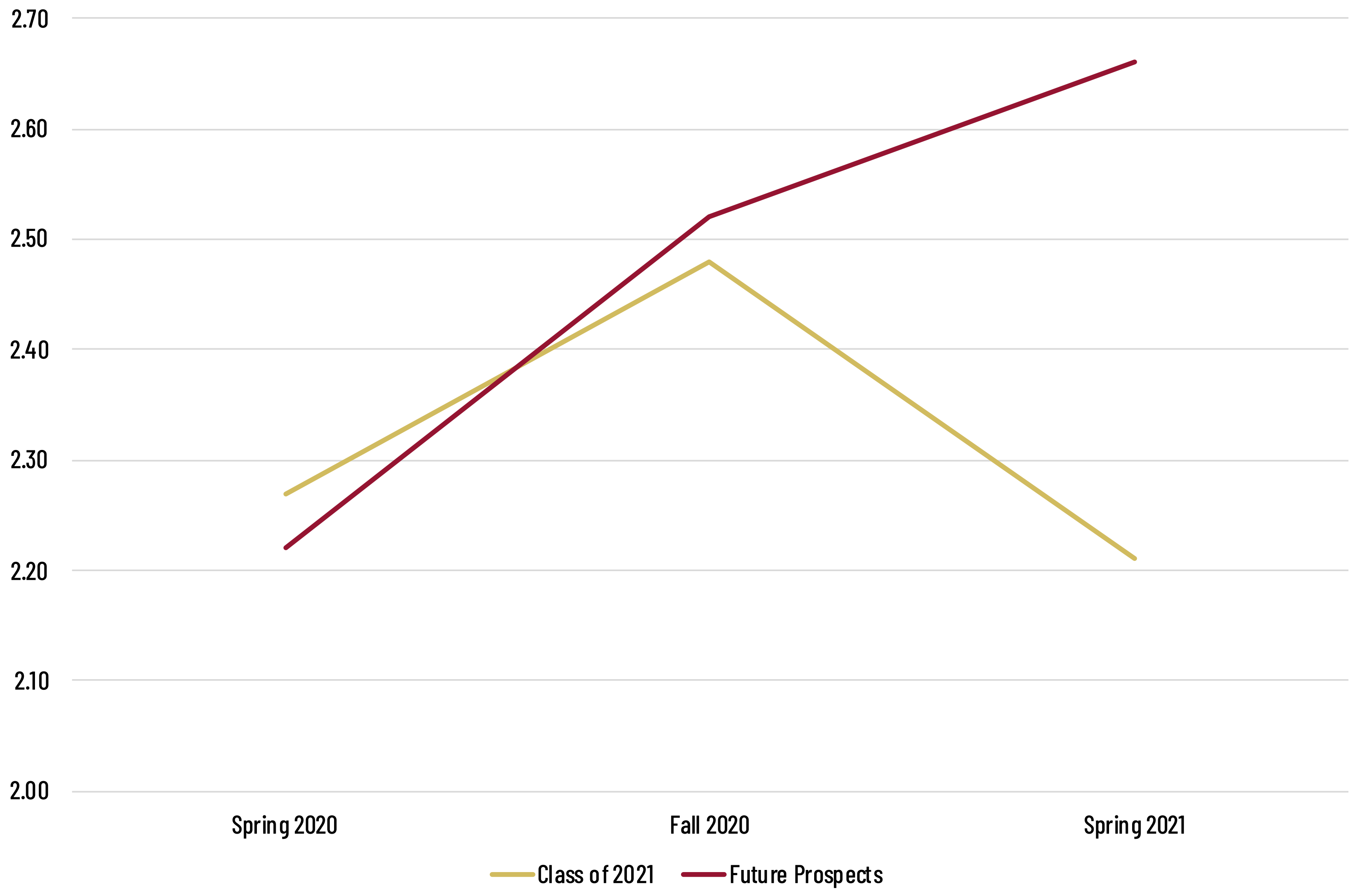


other shifting perceptions & behaviors

For the Class of 2021, interest in online classes has reverted back to scores seen around the start of the pandemic. Zoom fatigue, as well as highly positive feelings toward reopening with a vaccine in place, means that students going into 2021 are more prepared to be back on campus than they were in the fall. Comparably, two smaller studies by Carnegie Dartlet looking at audiences not yet ready for school showed acceptance has grown, suggesting that only once options are imminent do students begin to fully confirm their modality preference.

Notably, those planning to attend a community college or trade school are far more amenable to online courses compared to other school types. Those interested in attending a private religious institution were most opposed to online coursework. Consistent with findings from the Class of 2020, women are less willing to take the majority of their coursework online than men. Students of color were more amenable to online learning than their White peers, and those with high (but not full) confidence in their ability to afford higher education were less willing than other financial confidence levels to learn online.

ACCEPTANCE OF TAKING COURSEWORK ONLINE



MAY

01

90% OF STUDENTS SURVEYED WERE EITHER NEUTRAL OR FAVORABLE TO LENIENCY ON COMMITMENT DATE BECAUSE OF THE IMPACT OF THE PANDEMIC. THIS IS CONSISTENT WITH THE CLASS OF 2020.

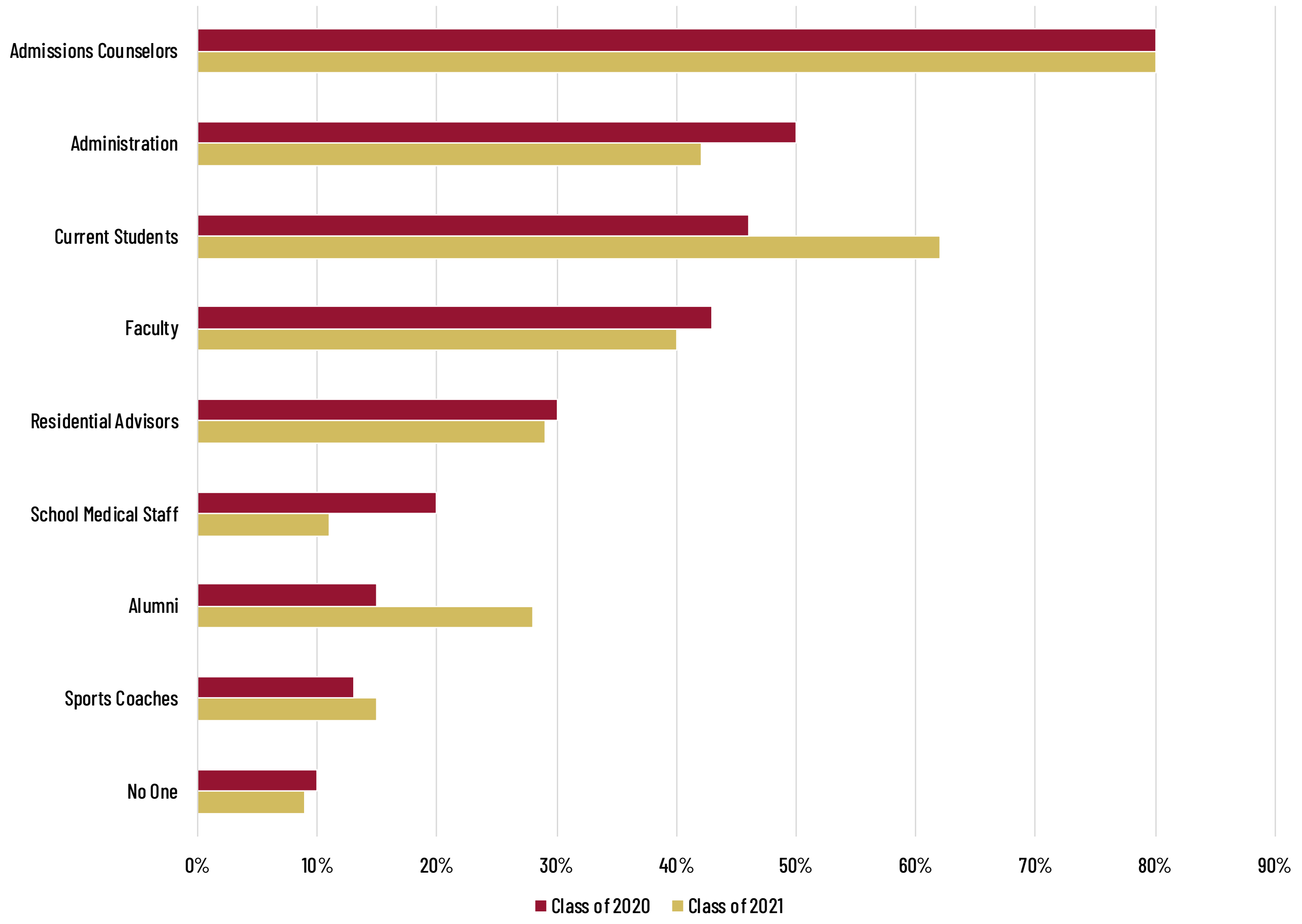
60% OF STUDENTS STILL UNCOMMITTED HAD A POSITIVE REACTION TO THE IDEA OF AN EXTENDED DEADLINE.

Most students at this stage want to hear from schools frequently—weekly or more than once a week. But striking a balance is key; only 8% of students want to hear from schools daily, and information should be fresh and relevant.

Since the Class of 2021 hasn't been able to visit as many campuses as they typically would, we see a shift from the Class of 2020 in preferred school contacts. The Class of 2021 is keen to talk with current students and alumni—far more than the previous cohort. Likely, this increase in preference for communicating with current students and alumni stems from a desire to determine if the "vibe" of the campus matches their own despite limited visit opportunities.

Those planning to get a COVID-19 vaccine in particular were interested in talking to current and former students. Uncommitted students were more likely to want to speak with alumni. Students planning to attend a community college or trade school were the most likely to indicate they weren't interested in speaking to anyone.

WHO STUDENTS WANT TO CONTACT AND COMMUNICATE WITH



INSIGHTS AND RECOMMENDATIONS

key strategic takeaways

The findings in this report, as well as those presented in Carnegie Dartlet's other pandemic-related research, are intended to assist colleges and universities across the higher education industry make strategic adjustments based on a deeper understanding of the pandemic's effect on the enrollment and engagement behavior of traditional undergraduate prospective students. There are several macro strategic takeaways from this latest round of research, and with the fall intake cycle quickly approaching, the ramifications for schools of different sizes and types may vary. We welcome conversations with anyone who would like to consider what this research may mean at a micro level for your institution.

In addition, the following key takeaways summarize considerations for the 2021 applicant cohort.

1

VACCINE INSIGHTS

For many institutions, the ability to offer a vibrant student life experience is a foundational distinctive. The good news is that students still crave these traditional college experiences. Despite this, students want to know what they're walking into regarding COVID-19 restrictions and campus policies, whatever those might be. Given this, it is up to the institution to provide clear messaging as to what students can expect on campus this fall. By and large, students are very open to vaccine requirements and continued mask and social distancing guidelines, so don't be afraid to clearly articulate your policies to ease students' lingering concerns. Strategic conversations on how to record vaccines and/or potential requirements need to begin now to be in the best position to launch fall programming that includes social gathering, in-person instruction, and student organizations.

2

DELAYS THIS YEAR VERSUS GAP YEAR

Whether it's financial aid or deadline extensions, students seek flexibility from colleges. Clearly communicating how a university plans to meet students' unique needs at this time is critical to gain the attention of those students who have yet to commit. Some students have delayed deposits to colleges this year, but the data suggest that they do not intend to delay their education. Students have also increased their number of completed applications, which is likely a result of a broad increase in universities offering test-optional application processes.
Both developments provide a window of opportunity for universities to increase their targeted marketing efforts with the goal of impacting yield. Students looking at schools nationally, and particularly students of color, have increased their total number of applications, which means schools have a unique opportunity to increase the potential to draw from new markets and further shape their class.

3

THE VISIT VOID

Although the virtual visit option is likely here to stay, it is a distilled stand-in for the power of an on-campus experience. Pandemic restrictions have resulted in a significant decrease in campus visits. What hasn't changed is the curiosity students have, as they are eager to understand the "vibe" of a campus and whether a particular university is a good fit for them. It could very well be that students who enroll this fall will be at greater risk for attrition due to getting the "feel" for the campus in real time as they experience the campus in person for the first time. Although this research did not directly speak to this, those universities anticipating a need for stronger retention strategies and interventions are likely to enjoy higher, more sustained enrollment counts.

4

EDUCATIONAL DELIVERY

Although students who are looking to enroll as a part of traditional, first-year cohorts this fall might be drawn to a hybrid delivery model—including both on-ground and virtual learning modes—there appears to be an ongoing expectation of reduced costs accordingly. Enrollment and aid strategies need to be mindful of the attraction of hybrid pedagogies as well as the potential impact on net tuition revenue (from decreased enrollments if hybrid models are not offered or from discounted pricing that meets student expectations based on virtual offerings). Messaging efforts need to mirror the institutional commitment to models of instruction while speaking to the value and advantages of how your campus offers a distinct delivery and student experience.

5

FINANCIAL NEED AND SECURITY

The pandemic has greatly affected students' confidence in paying for higher education. With over half of respondents reporting financial hardship caused by the pandemic, effective financial aid messaging will be critical. The Class of 2021 expects additional financial aid options as a result of the pandemic, and without those, institutions can expect to get overlooked. Messaging these additional options will help move the needle for uncommitted students, especially those students known to be hit hardest by the pandemic—women and people of color.

About Our Sample

STUDENT VOICES

Using the nationwide CollegeXpress platform, Carnegie Dartlet gathered information from current high school seniors looking to begin their college journey in the fall 2021 semester. More than 4,100 students responded to a varied question set that included application hurdles, testing frustrations, virtual tours, and overall college choice. 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 4,129 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.

Interested in more data? View our supplemental data tables.

GENDER	PERCENT
Woman:	72%
Man:	25%
Transgender:	<1%
Other:	3%

CONFIDENCE IN AFFORDING HIGHER ED	
Not Confident:	18%
Slightly Confident:	27%
Somewhat Confident:	33%
Highly Confident:	15%
Completely Confident:	6%

COMMITMENT STATUS	
Committed to a School:	42%
Not yet Committed:	58%

RACE (ALL THAT APPLY)	PERCENT
American Indian/Alaska Native:	2%
Asian:	19%
Black or African American:	16%
Hispanic or Latinx:	21%
Middle Eastern/North African:	2%
Pacific Islander:	1%
White:	54%
Other:	2%

LOCATION	
Midwest:	16%
Mountain West:	9%
Northeast:	27%
Heartland:	13%
South:	16%
West Coast:	19%

The Power of Human Connection

Since 1983, Carnegie Dartlet 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—we can partner with you to achieve them.**

RESEARCH | STRATEGY | CREATIVE | DIGITAL | LEAD GEN | TEAM DYNAMICS

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