



BILL & MELINDA
GATES *foundation*

Continuing to Explore the Exodus from Higher Education

Year Two

Findings from Focus Groups and Surveys with High School
Juniors and Seniors and Non-Enrolled Adults

MARCH 2024

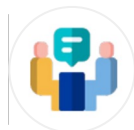
Research Objectives and Questions

In 2022, the Bill & Melinda Gates Foundation commissioned a study to better understand what is driving declines in enrollment in 2-year and 4-year colleges. The research was focused on high school graduates, ages 18-30, who had either chosen not to attend college or had dropped out of a college program. This study builds on the 2022 learnings and expands the scope to include high school juniors and seniors.

Key Questions Explored

- Is this audience looking at college options in the same way as they did last year?
- Has there been a change in value perceptions given social/political/economic forces?
- What type of learning does this audience value and why?
- What is the education journey like and where does the system lose people?
- What solutions/policy proposals are appealing?

Research Process

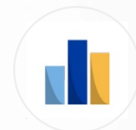


FOCUS GROUPS

JUNE 2023

10 virtual focus groups:

- 3 groups of high school juniors and seniors
- 7 groups of high school graduates who decided not to attend college or dropped out of a 2- or 4-year program
- Mix of gender, race, ethnicity, geography, first generation vs. not



NATIONAL SURVEY

SEP-OCT 2023

Online survey (total n=4848):

- n=1718 **high school** juniors and seniors
- n=3130 **Non-Enrolled**: High school graduates, ages 18-30, who had decided not to go to college or have dropped out of a 2-year or 4-year college program
- Oversamples of key audiences and states

Green/Red text throughout indicates **higher** and **lower** statistically significant differences across subgroups.

▲ ▼ indicate **higher** and **lower** statistically significant differences from 2022 survey.

Majorities of Non-Enrolled Adults See the Many Benefits of Getting a Degree, but the Perceived Importance Declined Across the Board From Just a Year Ago

Very/Somewhat Important as a Reason to Get a College Degree (Among Non-Enrolled)



Red text throughout indicates **lower** statistically significant differences across subgroups.

Arrows indicate **lower** statistically significant differences from 2022 survey.

*Question not asked in 2022 study

High Schoolers are More Likely to Equate College Importance with Future Job Placement, Earnings, and Job Security vs. Knowledge and Skill-Building

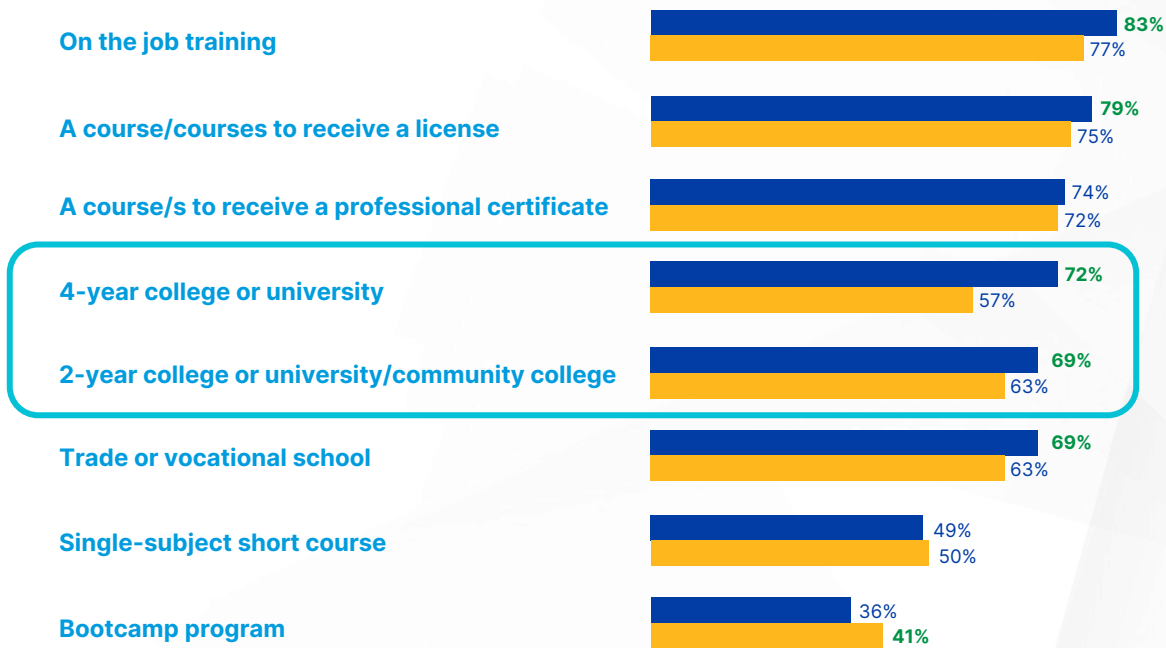
Very/Somewhat Important as a Reason to Get a College Degree (Among High Schoolers)



Green numbers indicate significantly higher value by audience.

High Schoolers Rate the Value of 2- and 4-year Credentials Higher Than Non-Enrolled Adults, but for Both, College Value is “Middle of the Pack”

Excellent/Good Value



34% of High School and **49% of Non-Enrolled** view **online learning via YouTube or TikTok** as an excellent/good value.

The Non-Enrolled Audience Sees Even Greater Value in Licenses, Certificates, and Trade School than a Year Ago

Good/Excellent Value (Non-Enrolled Only)



These days, a good job requires a certification as proof of someone's skills (69% High School, 65% Non-Enrolled agree)

These days, a good job requires a college degree (58% High School, 51% Non-Enrolled agree)



The College Journey: Where Do They Feel Prepared and Where Do We Lose Them?

Methodology

The study explored three key phases of the college journey to understand where the system is most helpful, and where prospective students need the most support. Students were asked:

- How well high school prepared them for various aspects of the journey?
- Where they feel most challenged?

Then we then did a driver analysis to understand which areas have the biggest impact on intent to go to college.



Pre-College

- Understanding postsecondary options
- Deciding where to apply, major
- Test prep and application process
- Being prepared academically, emotionally
- Getting into college of choice
- Advice on career and salary potential



Paying for College

- Understanding cost/what family can afford
- Learning about scholarships, grants
- Learning about financial aid: what qualify for, how to fill out forms, turning in on time



Attending College

- Selecting classes, major
- Succeeding academically
- Social and emotional support
- Covering expenses, balancing responsibilities, job opportunities
- Maintaining financial aid

The College Journey: High Schoolers

High school feelings of preparation are based on what they *currently* know – The Pre-College Phase

Pre-College

They feel most prepared, but fear making the wrong choice

Areas of Strength

(Drivers of interest, feel more prepared):

- Understanding educational options that lead to high demand jobs
- Standardized test prep
- Being prepared academically

Need the Most Help

(Challenges or drivers of interest, feel less prepared):

- Deciding what to study/major
- Deciding where to apply
- Being prepared socially/emotionally

Paying for College

Less confident and need more assistance

Areas of Strength

(Drivers of interest, feel more prepared):

- Learning about scholarships, grants, and other opportunities to cover costs

Need the Most Help

(Challenges or drivers of interest, feel less prepared):

- Cost/what family can afford
- What financial aid you may qualify for
- How it works once you receive it
- Turning in forms on time

Attending College

More worried about finances than academics

Areas of Strength

(Drivers of interest, feel more prepared):

- Succeeding academically

Need the Most Help

(Challenges or drivers of interest, feel less prepared):

- Being able to cover expenses
- Balancing responsibilities
- Selecting classes/major
- Maintaining financial aid

The College Journey: Non-Enrolled

On almost all dimensions – particularly the first two phases – the Non-Enrolled felt less prepared than High Schoolers; but many of the same patterns for support emerge

Pre-College

Feel like high school failed them on many dimensions

Areas of Strength

(Drivers of interest, feel more prepared):

- *(Nothing in this stage)*

Need the Most Help

(Challenges or drivers of interest, feel less prepared):

- Prepared socially/emotionally
- ***Understanding educational options that lead to high demand jobs***
- ***Completing applications***
- Deciding what to study/major in
- ***Getting into college of choice***

Paying for College

Understanding financial aid is a key barrier

Areas of Strength

(Drivers of interest, feel more prepared):

- Learning about scholarships, grants, and other opportunities to cover costs

Need the Most Help

(Challenges or drivers of interest, feel less prepared):

- What financial aid you may qualify for
- Cost/what family can afford
- How it works once you receive it
- ***Understanding how to fill out financial aid forms***

Attending College

Significantly less prepared with finances/responsibilities vs. academics

Areas of Strength

(Drivers of interest, feel more prepared):

- Succeeding academically

Need the Most Help

(Challenges or drivers of interest, feel less prepared):

- Being able to cover expenses
- Balancing responsibilities
- Maintaining financial aid
- ***Finding internships and other job opportunities***

Items in bolded italics are where they differ from high school students.

The Biggest Barriers are Concerns About Cost/Debt and Value, but also the Pressure and Uncertainty About “Getting it Right”

Reasons Not to Go/Complete College (only asked among those who may not go)	High School	Non-Enrolled
Too expensive/do not want to take on (more) debt	46%	44%▲
Do not enjoy going to school	39%	31%▲
Not worth the money it costs to attend	34%	31%▲
Too stressful/too much pressure	32%	35%▲
Unsure about major/future career	30%	29%
Can get skills/credentials through other educational programs	27%	14%
More important to get a job and make money	27%	26%
It's more important to get real-world experience	22%	17%
Not prepared academically/classes too hard	21%	17%▲
Do not feel like I fit in/like I would fit in	19%	19%▲
Not prepared for the college experience/living on my own	18%	16%▲
Life moves quickly, and college takes too much time	17%	21%
Unsure how to pick the right classes	13%	16%
There is not enough flexibility given all of my other responsibilities	10%	16%
Did/do not feel like I would be supported in college	9%	17%▲
Don't/didn't know where to get advice on the best college options	9%	13%
Family obligations	8%	18%
Not accepted to the school I want(ed) to attend	6%	5%
College cannot keep up with the changes in my chosen field/career	4%	5%
Did not like classes/chosen major	3%	8%

4-in-10 High schoolers do not enjoy school

Several reasons **not** to attend college **increased for Non-Enrolled** compared to 2022

Green text throughout indicates **higher** statistically significant differences across subgroups. Arrows indicate **higher** statistically significant differences from 2022 survey.

After Debt Relief, These Audiences Want Expert Assistance Designing a High School to College Experience that Puts Them on a Path to a Career and Greater Certainty

Eliminating debt for anyone who gets a degree from a community college or trade school.

Having an expert assigned to you – such as a mentor or counselor – to help you navigate the college experience—they would help you choose what classes to take, find ways to help you if you are struggling in some classes, and help you take the steps necessary to graduate on time.

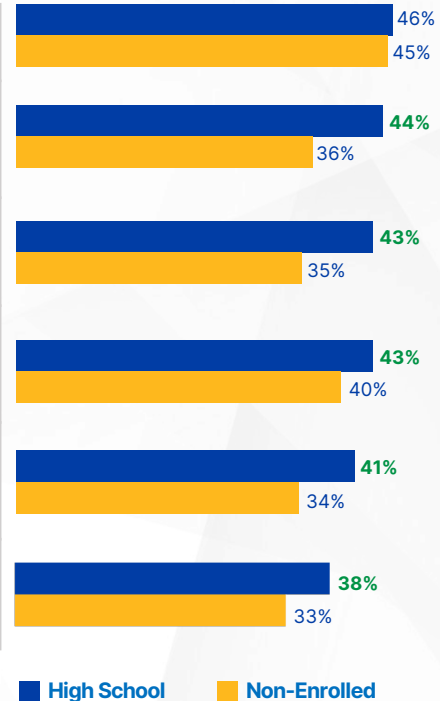
Having an expert – such as a mentor or counselor – assigned to you in high school to help you understand how to finance your education, including helping you fill out the FAFSA and other scholarship/financial aid applications.

Having a program in high school that helps students determine what careers best match their skills and interests, and then working with students to understand which colleges can best help them pursue that career and find a job after graduation.

Being assigned to an expert in your college major/field of study to help you find apprenticeships/internships and to help you navigate the job market/get a job in your field for up to 12 months after you graduate.

Having more dual enrollment opportunities in high school. Dual enrollment means being able to take college classes during high school so that you can earn college credit while in high school. These classes cost less and can reduce the time it takes to get a 2- or 4-year college degree.

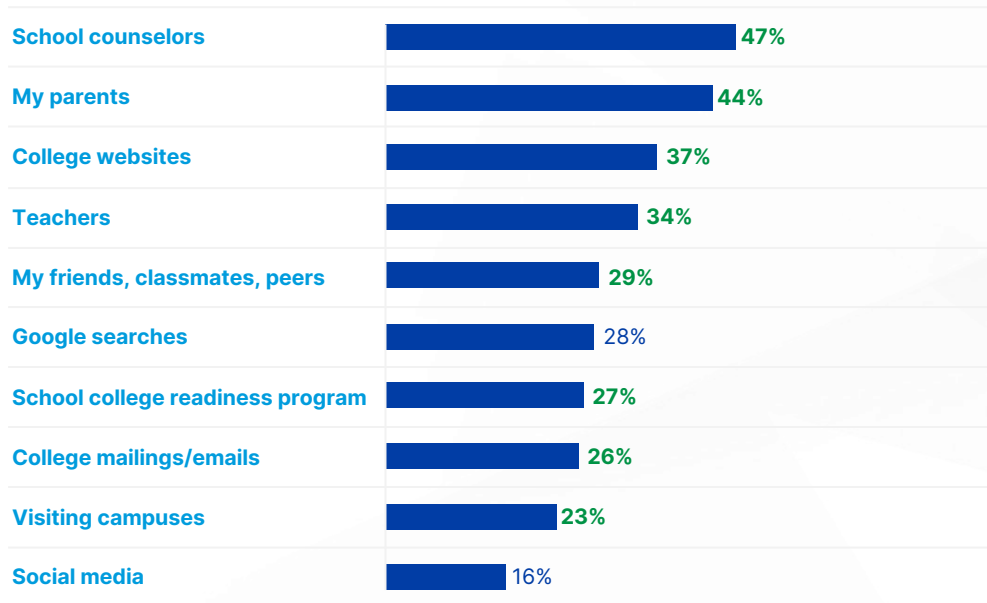
Extremely Helpful



Green numbers indicate significantly higher value by audience.

The Surround-Sound High Schoolers Receive About College is Mostly Positive

Top 10 Sources for College Information



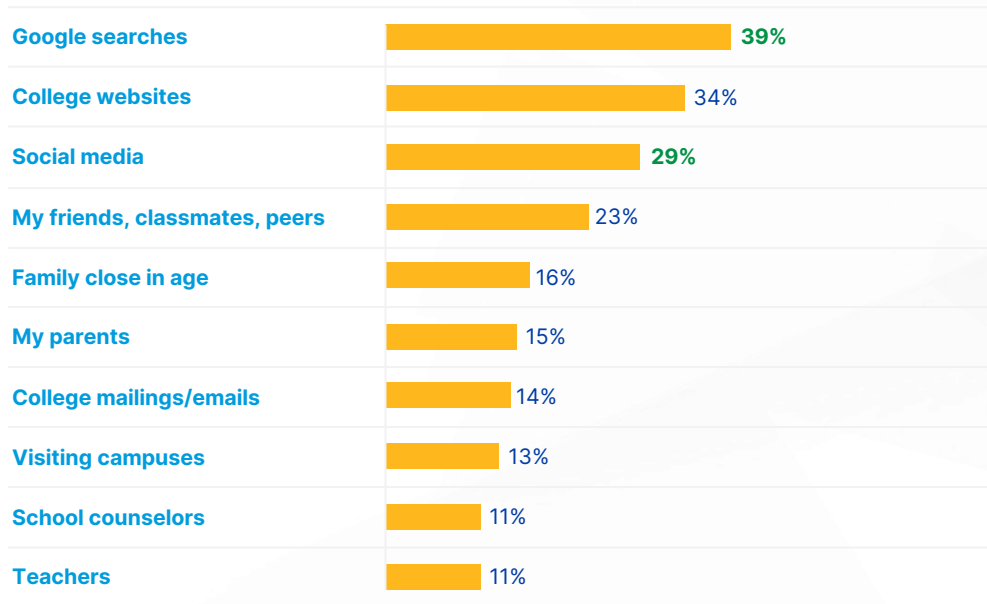
Green numbers indicate significantly higher vs. Non-Enrolled audience.

Perceptions of the Info Getting



Non-Enrolled's Receive Less Targeted Information, and Find Information Less Favorable

Top 10 Sources for College Information



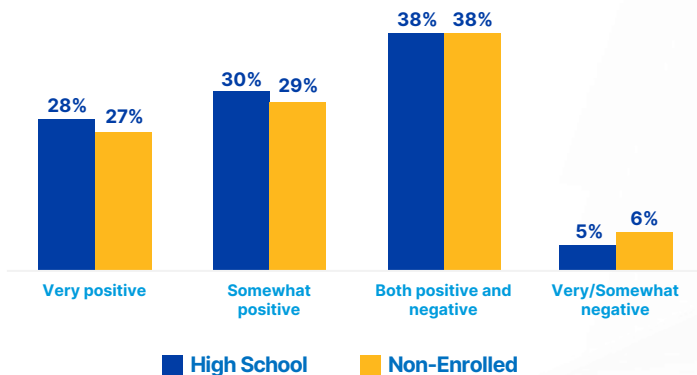
Green numbers indicate significantly higher vs. High School audience.

Perceptions of the Info Getting



Media Matters – Those Who Perceive Mostly Positive Coverage are Significantly More Likely to Plan on Attending

College Education in the Media



If These Audiences Perceive...

The Audience	...Mostly Positive Coverage	...Mixed to Negative Coverage
High School	82% Definitely Plan on College	59% Definitely Plan on College
Non-Enrolled	52% Definitely Plan on College	31% Definitely Plan on College

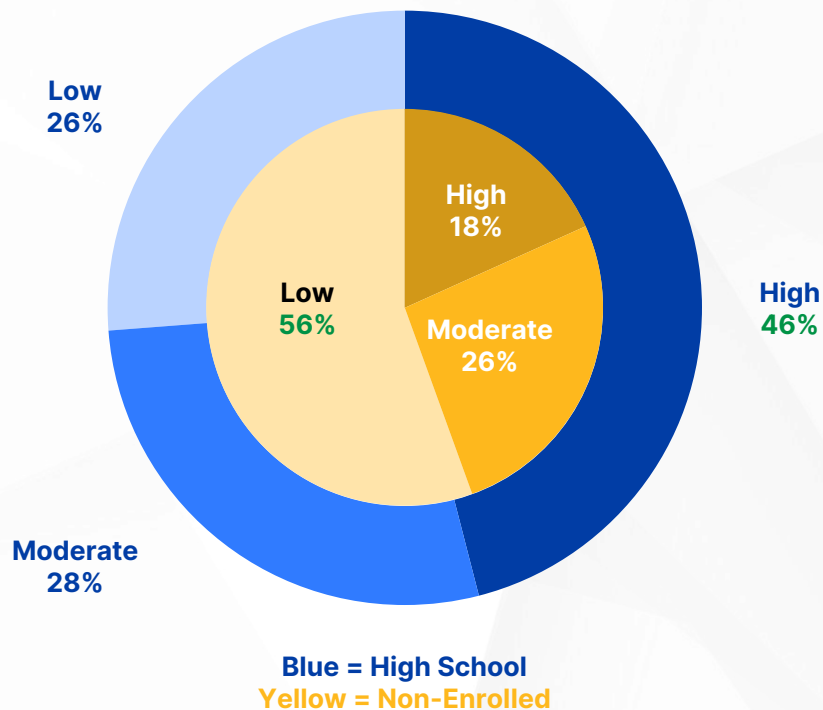
Green numbers indicate significantly higher value.

Data Points Reveal a More Realistic Picture of College Interest

College Interest Index

Index combines three data points to create a clearer picture of college-going intent:

- **Intent:** Stated intent to attend college
- **Timing:** How soon they plan to attend
- **Value:** Perceived value of 2-year and 4-year college degrees



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The Issue in a Nutshell...

The Audience	High School	Non-Enrolled
The Environment	<ul style="list-style-type: none"> Center of the college application “orbit” The norm/expectation is to apply Most info sources are directly focused on this audience and communication primarily paints college in positive light Outcomes-focused: job/earnings/security 	<ul style="list-style-type: none"> The further removed from high school, the further from college-focused info sources Information they receive is less positive Perceived value of licenses and certificates has gone up, while benefits of going to college have declined since last year
The Challenge(s)	<ul style="list-style-type: none"> Uncertain about making the <i>right</i> decision, given debt concerns and no job guarantee Not enough done to find post-HS path that best fits each student Struggle to understand cost and how financial aid works Worried about covering expenses at college 	<ul style="list-style-type: none"> Even fewer feel high school prepared them Greater opportunity cost when making the college decision; need more help understanding how education → good jobs Financial aid is a black hole Unsure how to re-engage, balance school with responsibilities, cover expenses
The Solution(s)	<ul style="list-style-type: none"> Debt relief, expert help with financing Expert assistance designing a high school and college experience that put them on the path to a career Alleviate uncertainty, ensure ROI 	<ul style="list-style-type: none"> Same solutions resonate Need someone to help connect dots between high school interests, college options, and ultimate career Recreate their on-ramp

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