

Parent Perspective on the Impact of COVID-19 on College Students – Current State and Future Plans



April 2020

INVESTMENT BANKING + STRATEGY CONSULTING

Parents are critical of the current remote learning experience, and uncertain about fall enrollment in a continued distance-learning scenario

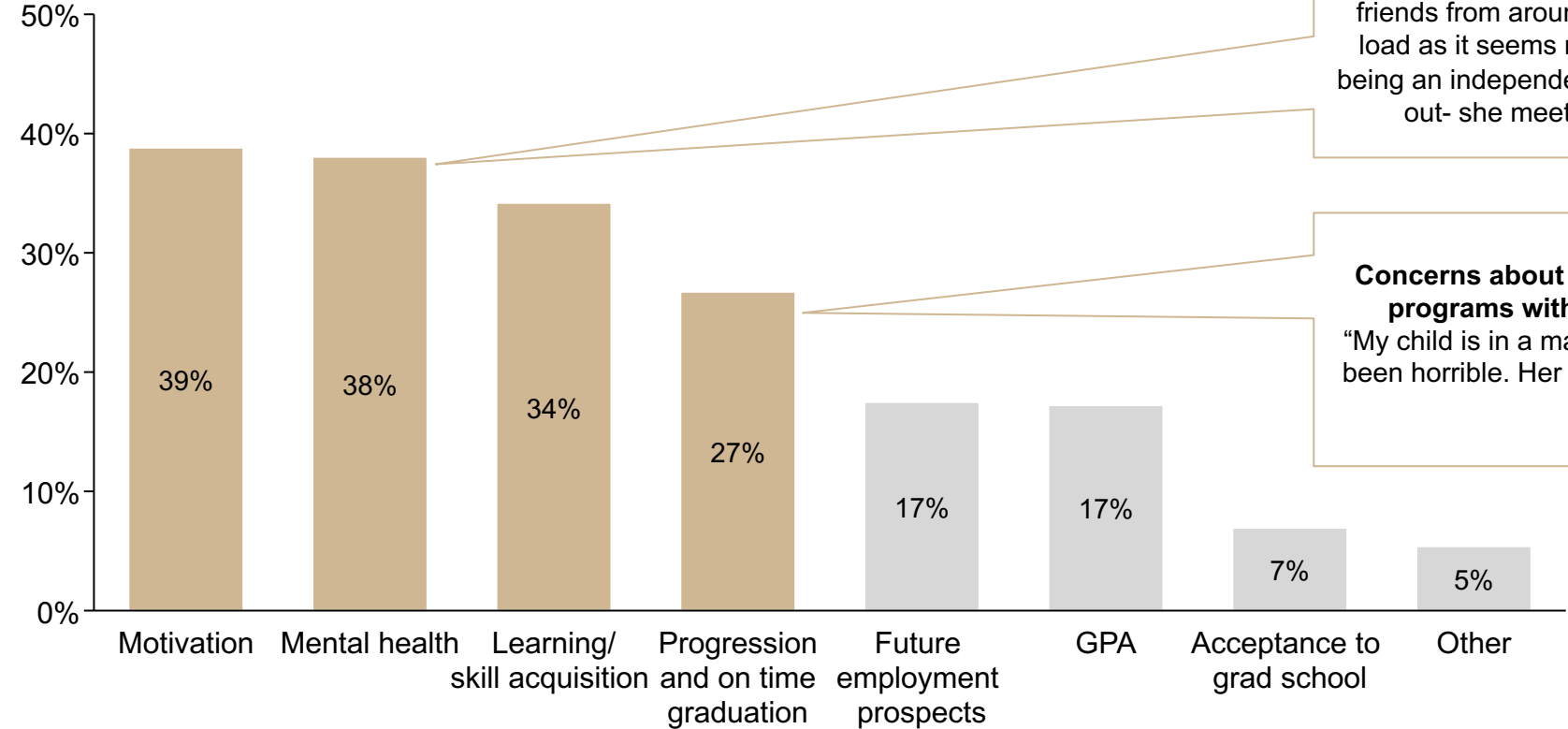
- **Parents note their immediate, primary concerns are about their child's well-being, continued learning and progression** – Parents are concerned first and foremost about their children's well-being and mental health (36%) followed by their continued engagement in their learning and skill-acquisition (32%), and thirdly about their on-time progression towards their degree (27%)
- **Current remote learning experiences don't measure up to parent expectations** – Parents score current remote learning experiences a 5.6 on a scale of 1-10; their concerns center around a mismatch between an in-person expectation and the reality of a hasty transition to remote learning. There is a perception that the learning experience is not as “high-quality” as the prior face to face experience, that instructors are not prepared, and that interactivity and engagement is low.
 - Parents whose children are meeting synchronously are more satisfied, as are parents who had a positive perception of online learning before the COVID crisis
- **Parents are uncertain about fall enrollment** – 40% say their child is unlikely to return in the fall in a continued remote learning environment.
- **Parents expect quality improvement or price reductions if remote-learning continues into the fall** – this expectation is most pronounced among parents of students enrolled in private institutions and least pronounced among those at 2-year institutions.
- **Parents of high-school seniors are most apprehensive** – almost 10% of parents report that they are planning to not send their student, and they are most likely to expect improvements and /or cost reductions.



Transparency and communication to students and parents is key to managing through the crisis, careful scenario planning for new modes of learning is key to managing out of the crisis.

Parents note concerns about their child’s motivation and mental health, continued learning and skill acquisition, and progress to degree

Current concerns over child’s education*
n= 389

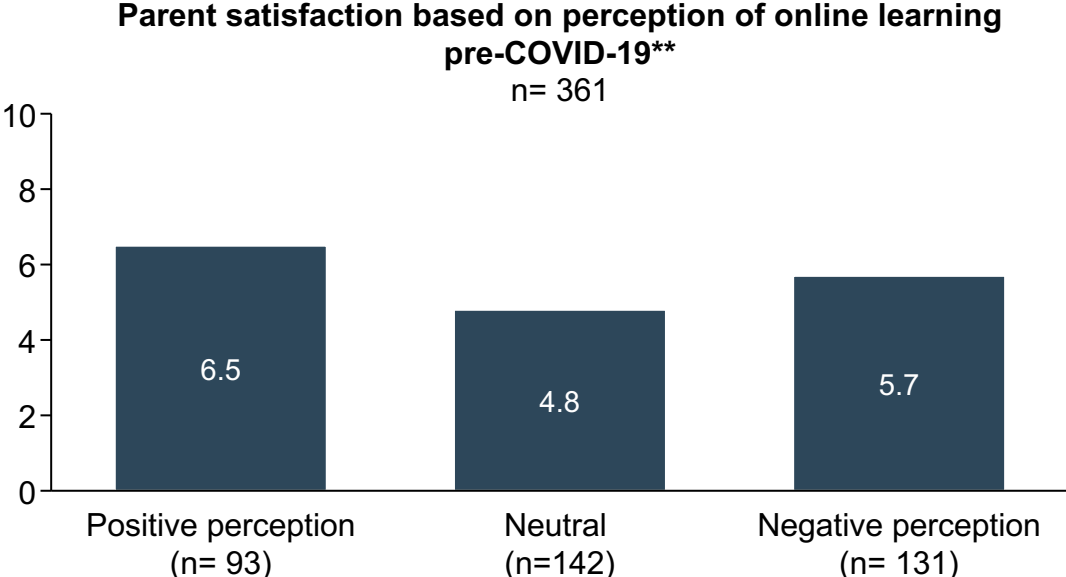
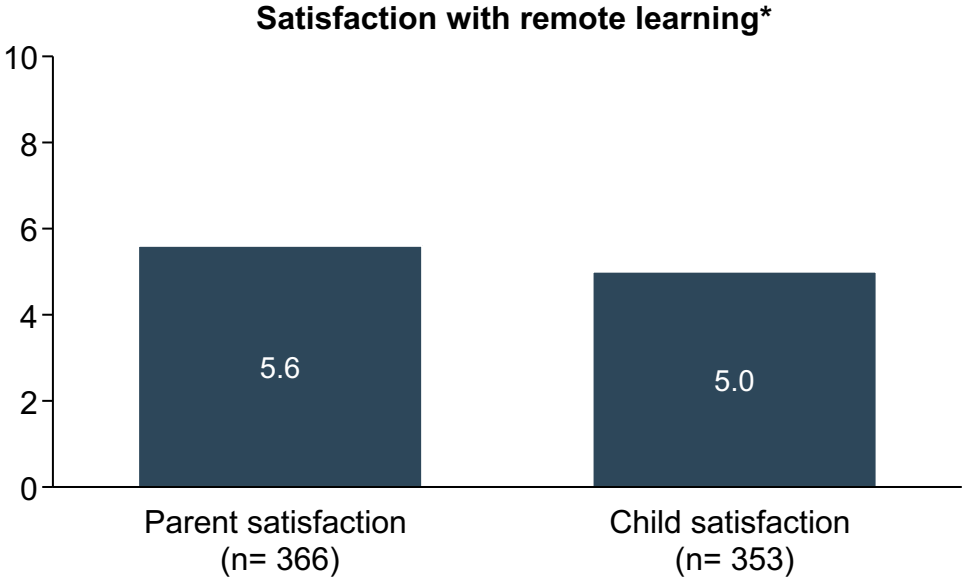


Parents note significant concerns that the transition is having on the mental health and motivation to study.
 “She’s depressed about her loss of independence and missing her friends from around the country- feeling overwhelmed with the course load as it seems more is being required than before- she’s gone from being an independent adult to living back home with no opportunity to go out- she meets often with friends online but it’s not the same.”

Concerns about progress toward degree are particularly acute in programs with clinical, lab-based, and applied components.
 “My child is in a major that requires lab experiences... this situation has been horrible. Her expected graduation date is now going to be delayed for at least a semester.”

Note: *Survey question: We recognize you are facing increased challenges and uncertainties – many of which are not related to your child’s education right now. However, regarding your child’s education, what are the most important concerns at the moment? Please select top two.
 Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

Parents are not impressed with the current remote learning experience as many value the in-person learning experience their child had opted for



Prior perceptions of online learning color parent satisfaction with the current remote learning experience. Those parents who had a negative perception of online learning as an effective tool for learning pre-crisis are less satisfied, and vice versa.

Notes: *Survey questions: How satisfied are you with your child's learning experience during this term?, How satisfied is your child with their learning experience during this term? 0 = not at all satisfied, 10 = extremely satisfied; **Survey question: Prior to the COVID-19 public health crisis, to what extent did you agree with the following statement: Online learning is an effective option for undergraduate education. Positive perception = strongly agree or agree, Neutral = neutral, Negative = Negative perception
Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

Several themes color parent perceptions of the current experience

<p>Remote-learning is seen as lesser quality</p>	<p><i>“The content seems very poor. Mainly it is the student reviewing online content then taking quizzes and tests. I’m concerned my student will not receive the same quality of education in this format as compared to actually being on campus.”</i></p> <p><i>“She’s a science major and has three difficult labs. The recorded labs are not done well, and she has no real access to professors or teaching assistants. It’s very frustrating to her and doing the lab homework takes a long time to figure out.”</i></p>
<p>Instructors are unprepared</p>	<p><i>“Inconsistency of delivery of instruction. Per my child. The professors with limited technology skills and knowledge are not instructing. They are only providing reading assignments without any lecture, requiring students to take an exam and show their work without any guidance.”</i></p> <p><i>“What is most challenging is her professors learning curve with the new technology. Each professor is not completely comfortable with online learning which makes it more difficult.”</i></p>
<p>Valued parts of student experience are missing</p>	<p><i>“All that my student enjoyed about college has been removed, and he is struggling with online instruction and lack of peer support.”</i></p> <p><i>“My child attends a small, private university. We chose this school collaboratively so that he could partake in getting to personally know his professors and fellow students. This is impossible to achieve online. Therefore, collaborative learning in his passionate classes is stunted.”</i></p>

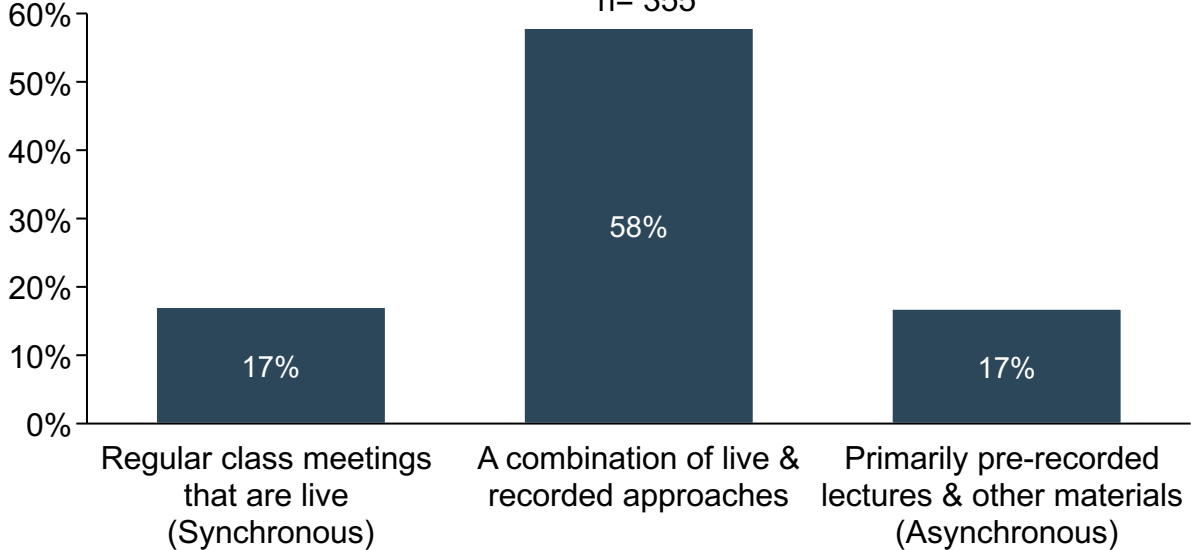
Parents who report at least some synchronous learning are more satisfied than those who report primarily asynchronous learning

Most institutions note that they are using a combination of live (synchronous) and recorded (asynchronous) methods of instruction

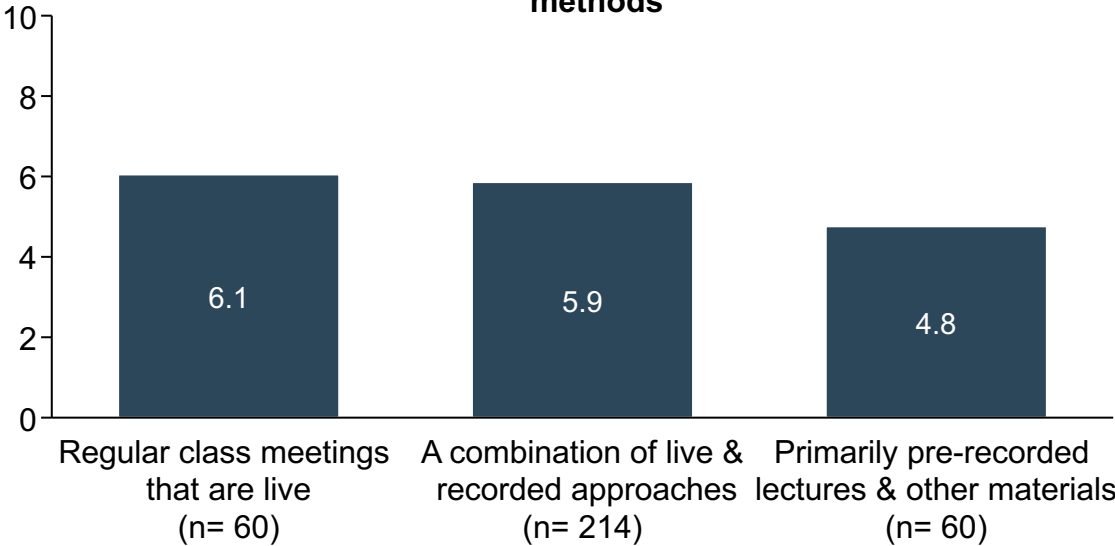
And parents value the live instruction based on differences in satisfaction scores

Current methods of online instruction delivery*

n= 355



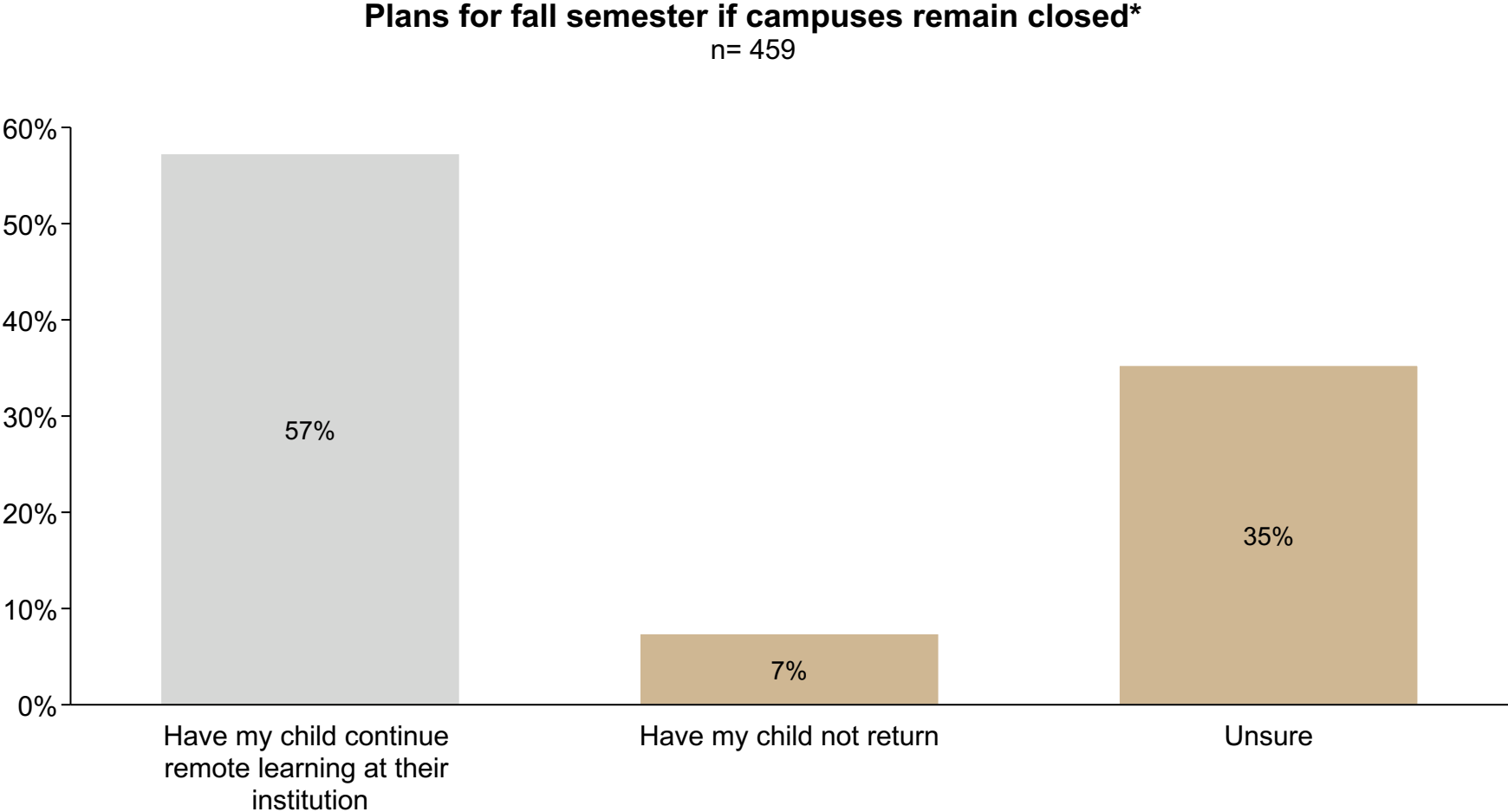
Parent satisfaction with online instruction delivery methods**



Notes: *Survey question: What does remote learning look like for your child right now?; **Survey question: How satisfied are you with your child's learning experience during this term? 0 = not at all satisfied, 10 = extremely satisfied

Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

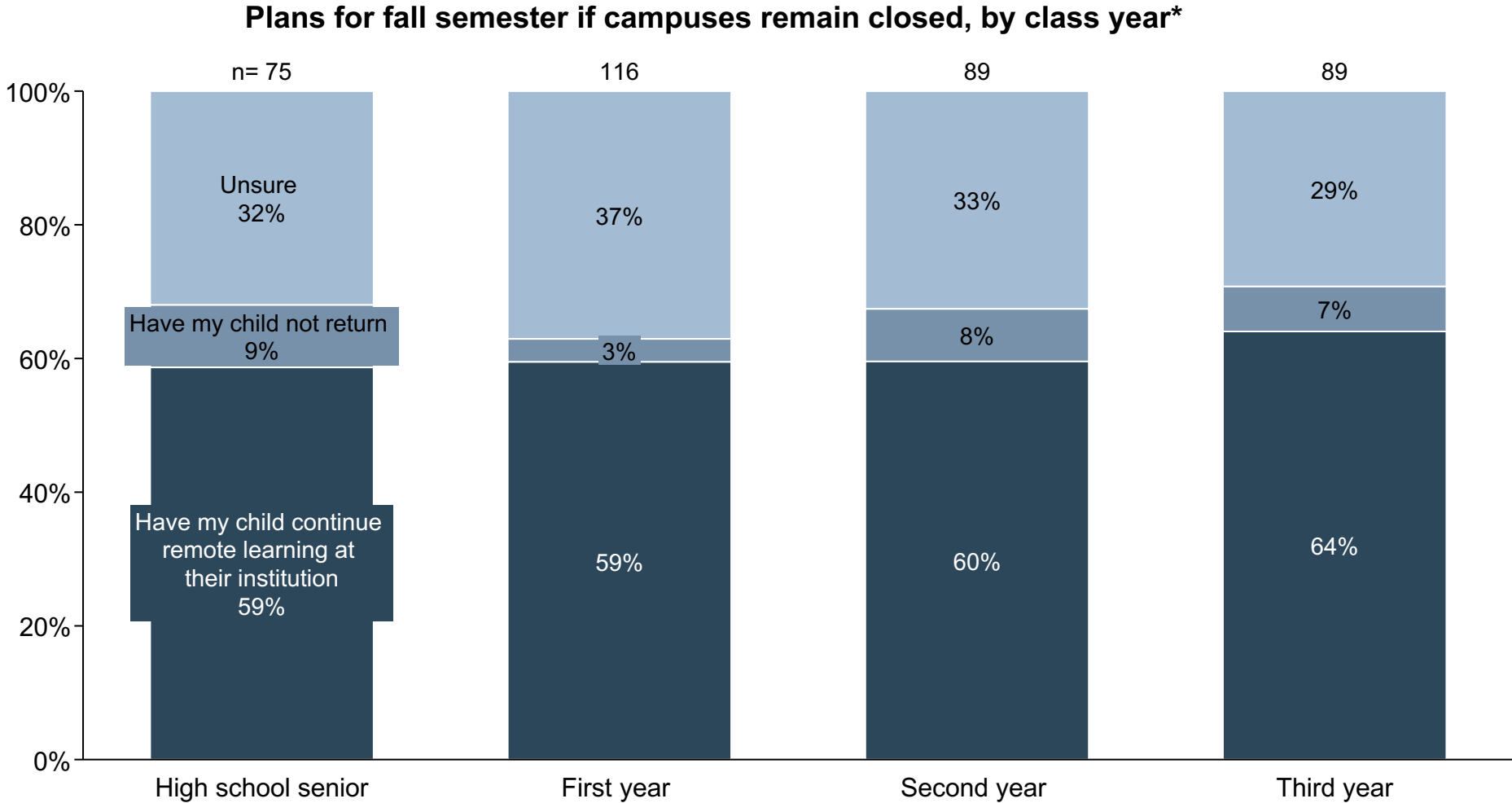
Parents are uncertain about fall enrollment in an environment with fall campus closures – 42% of parents report they are unsure or will not have child return



Note: *Survey question: If your child's institution does not reopen its physical campus for the fall semester, but continues to deliver courses remotely / online, what do you plan to do? Please select one.

Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

Uncertainty is high across all class years; Highest for incoming freshman, ~10% of incoming freshman parents saying their child will not attend in remote-fall scenario

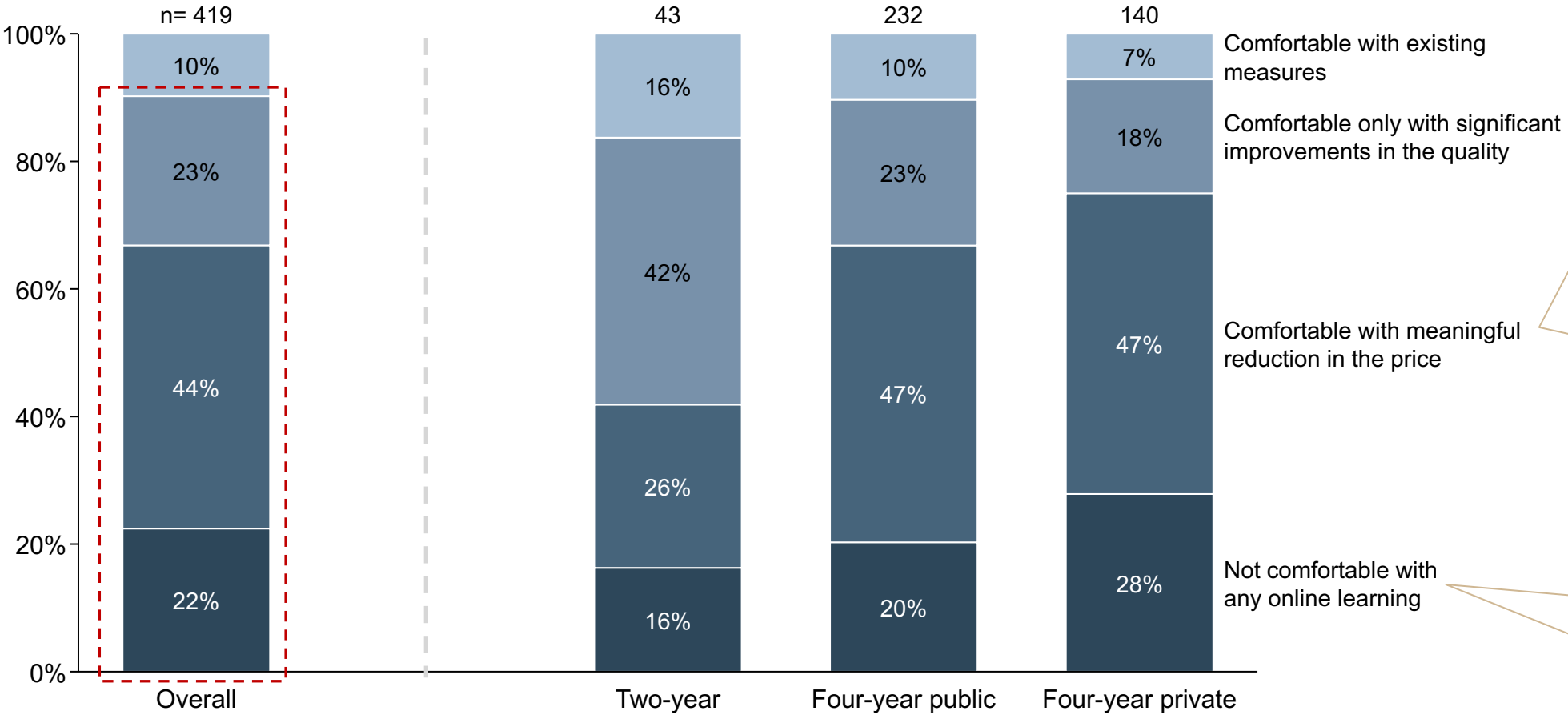


Note: *Survey question: If your child's institution does not reopen its physical campus for the fall semester, but continues to deliver courses remotely / online, what do you plan to do? Please select one.

Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

90% of parents say they are not comfortable with their child returning to the existing state of learning experience; 2-year parents most comfortable with existing state

Circumstances under which students will return in fall semester*



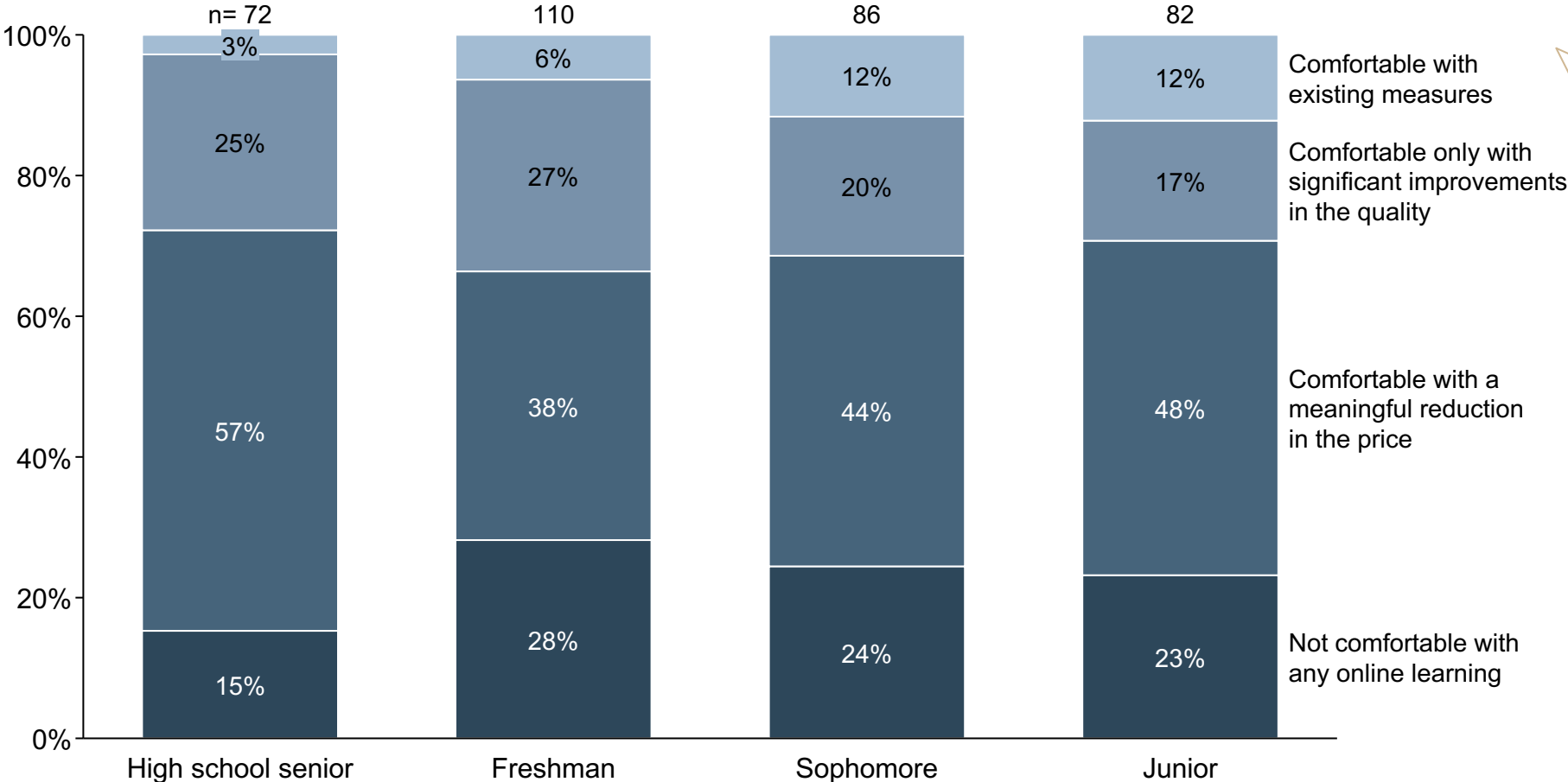
Parents at 4-year public and private institutions have highest expectations for price reductions. “I am seriously thinking about deferral if college doesn’t start on time. Paying 55 thousand dollars a year to sit in front of a computer is the worlds biggest rip off.”

And parents at 4-year private institutions note highest discomfort with any online or remote learning

Note: *Survey question: Under which of the following conditions are you most comfortable with your child attending their school this fall? Please select one.
 Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

And parents of high school seniors are most likely to expect improvement and not be comfortable with any form of online learning

Circumstances under which students will return in fall semester*

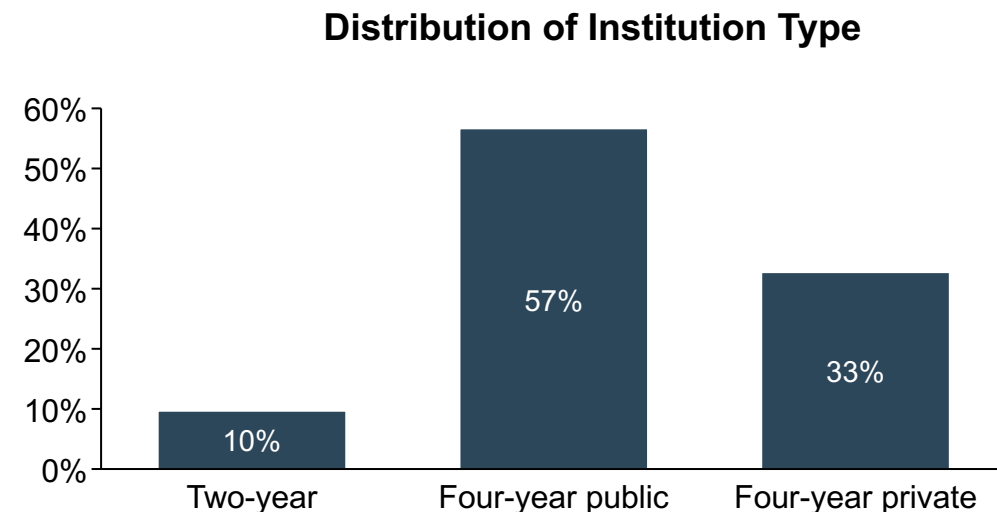
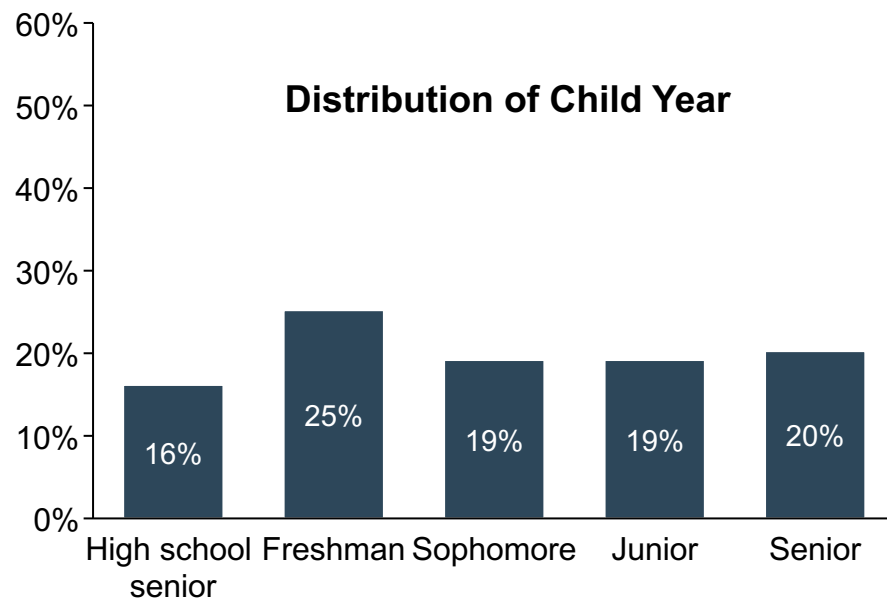


The parents of high school seniors in particular note anxiety and want transparency, “Colleges need to communicate their contingency plans now or extend decision days until they do. Decision day is May 1 and the majority are saying nothing. They are just waiting to see what their ‘yield’ will be... We understand the financial uncertainty, we have it too and are ready to commit to you, if you are honest with us and show you are making well thought out contingency plans.!”





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Source: Tyton Partners College Parent COVID-19 Pulse Survey April 2020

About the Survey and Methodology

- Between April 10-14, Tyton Partners conducted a short survey of 464 parents of enrolled college students (389) and college-bound high school seniors (75) using social media ad targeting parents of entering and current college students
- The survey focused on querying parents about the experience their children are having with remote learning, and their concerns about what they can expect in the fall.
- The sample includes a balanced mix of parents of high school seniors, and first through fourth year students. It included a roughly proportionate sampling from parents of students attending two- and four-year institutions, as well as public and private colleges.
- Given that parents opted in to share their opinions, we expect that there is some response bias. These are parents who are involved in and concerned about their children's education. Given that the survey took place online, they also have internet/ device access. Thus, responses should not be considered "representative" but as directional and illustrative of uncertainty in the market
- In gratitude for the time and perspective of parents who participated, a donation has been made to [Feeding America](#)



About Tyton Partners

	Evolved Advisory	An evolved advisory platform serving clients across the global education, media and information markets
	Investment Banking	Investment banking services built on a foundation of strategy development and operating experience
	Strategy Consulting	Strategy consulting built on a foundation of transactional experience and data-based market insight
	Unique Insights	A dynamic firm delivering insights, connectivity, and outcomes to a diverse range of companies, institutions, organizations, and investors

How we work with our clients

Institutions



Strategy development supporting:

- Revenue diversification and growth
- New program development
- Public / private partnership
- Mergers & affiliations

Initiative planning and execution in pursuit of:

- Teaching / learning innovation
- Student success
- Workforce alignment and outcomes
- Administrative / operational efficiency

Commercial and Non-profit Providers



- Growth strategy and development
- Product strategy and portfolio assessment
- Go-to-market strategy development
- Customer segmentation and prioritization
- Partnership strategy and execution

Investors



- Due diligence and acquisition support
- Post-close 90-day strategy audit
- Investment thesis evaluation
- Market segment evaluation

Foundations



- Market assessment and development
- Theory of change enablement and network development
- Grant-making strategy development
- Grantee scaling technical assistance

To discuss these survey findings or our work, contact us

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