

K-12 State of Learning: Parents' Perspectives on Fall 2020



July 28, 2020

INVESTMENT BANKING + STRATEGY CONSULTING

About the survey

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- Tyton Partners launched a short nationwide online survey to parents of PreK-12 students on July 15-21, 2020 to better understand how parents are preparing for the the Fall semester (F20) and in what ways the K-12 community can best support them
- This study follows an initial parent pulse survey in March 2020. In selected areas, we have made comparisons to data from this spring survey (i.e., SP20)
- Survey questions for the July administration focused on several issues including, but not limited to:
 - Challenges with remote learning
 - Expectations for the fall semester
 - Ways that schools and providers can best support families during a fall remote learning scenario
- Respondents include 295 parents from 47 states with children in grades PreK-12
- Parent identifiers include geography and grade-band. Other personal demographics (e.g., socio-economic status, household income, education levels) were not included in the survey
- Tyton Partners has donated to [The Remote Learning Relief Fund](#) to ensure teachers get the tools they need to deliver quality instruction that engages all their students, no matter where the learning is taking place
- If you have any questions, please contact Managing Partner Adam Newman at anewman@tytonpartners.com

Key observations derived from K-12 parents' perspective

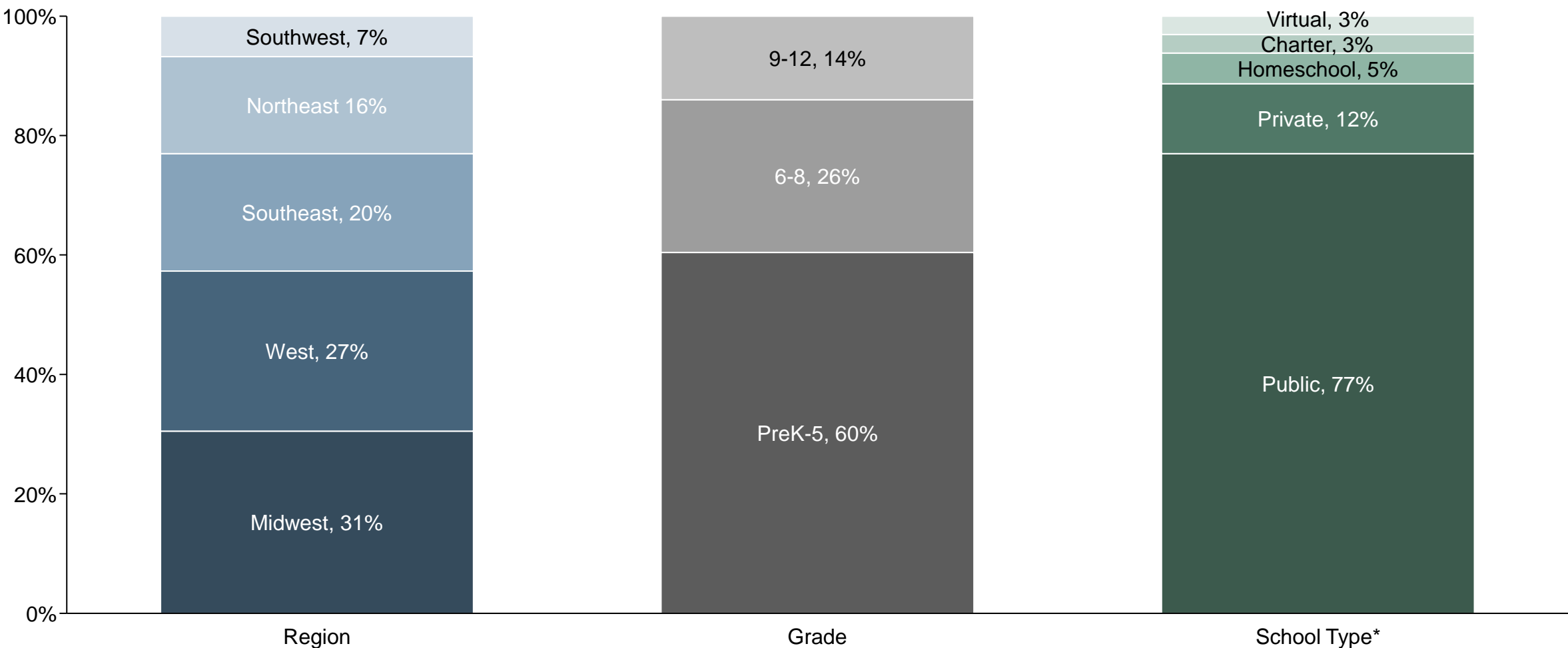
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- **Students have suffered as a result of school closures**
 - More than half of parents believe their child has fallen behind academically
 - This dynamic is more pronounced for parents of high schoolers, where 66% of respondents believe their child fell behind academically
- **K-12 enrollment patterns could dramatically shift**
 - Only 64% of parents have committed to keeping their child enrolled in the same school this fall; the percentage of parents who have decided to homeschool their children has increased 7% from the spring
 - Public school parents are most likely to seek alternative options
- **Parents report their child's school reopening plans are still in limbo**
 - ~75% of parents have not received a concrete re-opening plan from their school for the fall
 - Of those who have not received a concrete plan, 22% predict their school will resume full in-person learning, while 17% expect a fully remote experience
- **Parents are more optimistic about their role in remote learning**
 - Should remote learning continue, nearly half of parents indicate they are better equipped to support their children now than they were six months ago
 - Most parents (i.e., 51%) plan to leverage free online resources to supplement their child's learning should remote classes continue

Survey demographics

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K-12 parent respondent demographics



Note: 295 total respondents; *2019 K-12 enrollment: 82% in public school, 9% in private school, 5% in charter schools, and ~3% homeschooled
Sources: EducationData.org; National Center for Education Statistics; Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

Parents’ priority remains ensuring their child is on-track academically; however, they report experiencing greater tension balancing this with their job responsibilities

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Top parent priorities related to their child’s education

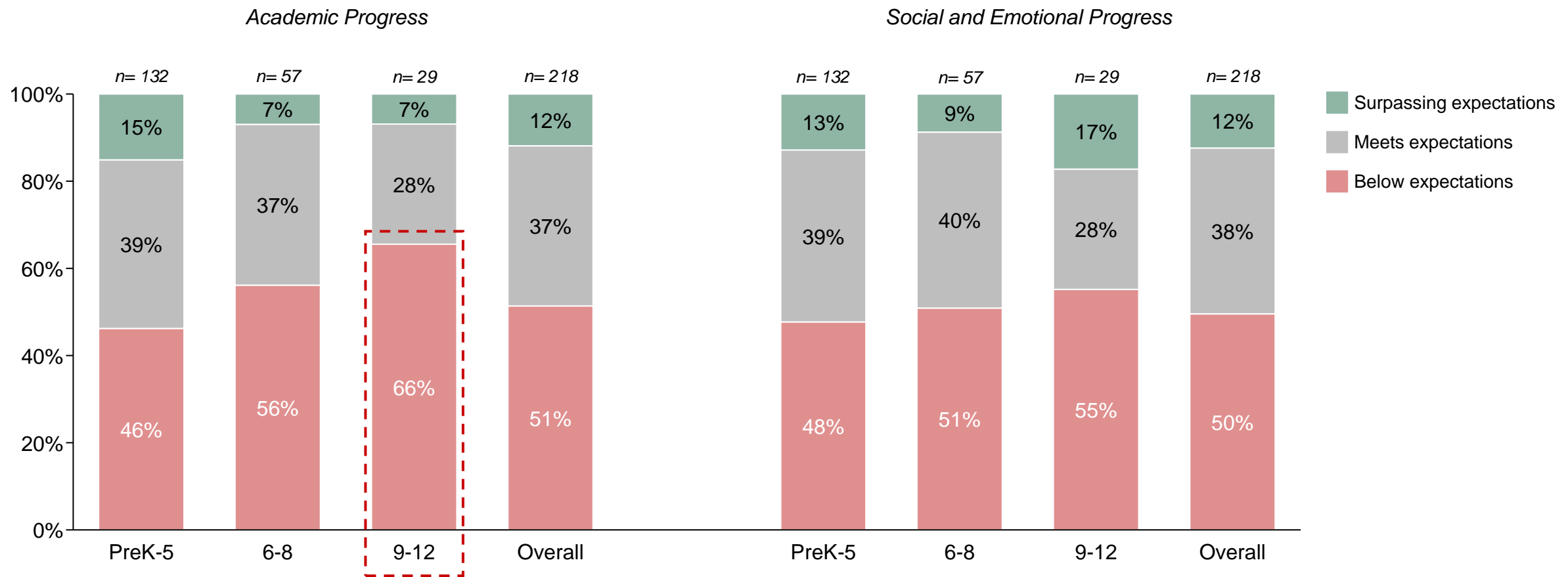
March 2020					July 2020				
	Overall	PreK-5	6-8	9-12		Overall	PreK-5	6-8	9-12
1	Keeping child on-track academically for next school year	On-track academically	On-track academically	On-track academically		Keeping child on-track academically for next school year	On-track academically	On-track academically	On-track academically
2	Helping child remain connected with friends/ teachers	Keeping child focused	Keeping child focused	Helping my child remain connected		Balancing my workload with child’s educational needs	Balancing workload	Balancing workload	Keeping child focused
3	Keeping child focused on learning throughout the day	Helping my child remain connected	Easing my child’s anxieties	Easing my child’s anxieties		Keeping child focused on learning throughout the day	Keeping child focused	Keeping child focused	Easing my child’s anxieties

Question: “In regards to your child’s education, what is your top priority? Select your top two priorities;” n=253
Source: Tyton Partners COVID-19 K-12 Education Parent Survey, March 2020; Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

66% of high school parents believe their child fell behind academically this spring; PreK-5 parents express slightly less concern

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Student progress during school closure, spring 2020



Question: Compared to normal conditions, which of the following best represents your child's academic/SEL progress during school closure?
Sources: Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

Parents attribute academic and social-emotional struggles to a lack of new material and infrequent social interactions; they remain concerned about the future

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Parent commentary on academic and social-emotional progress

Academic

Majority of parents feel their child is behind academically, and 17% indicate the disruption has led to *significant loss*

- “There was literally no accountability, and the kids know how to get around that system [remote learning] and took the path of least resistance.”
- “Our district did not teach 4th quarter standards. Instead, they chose to focus on **reviewing standards already taught.**”
- “I’m afraid that he will **fall way behind** without the full in-person school experience.”

Social and Emotional

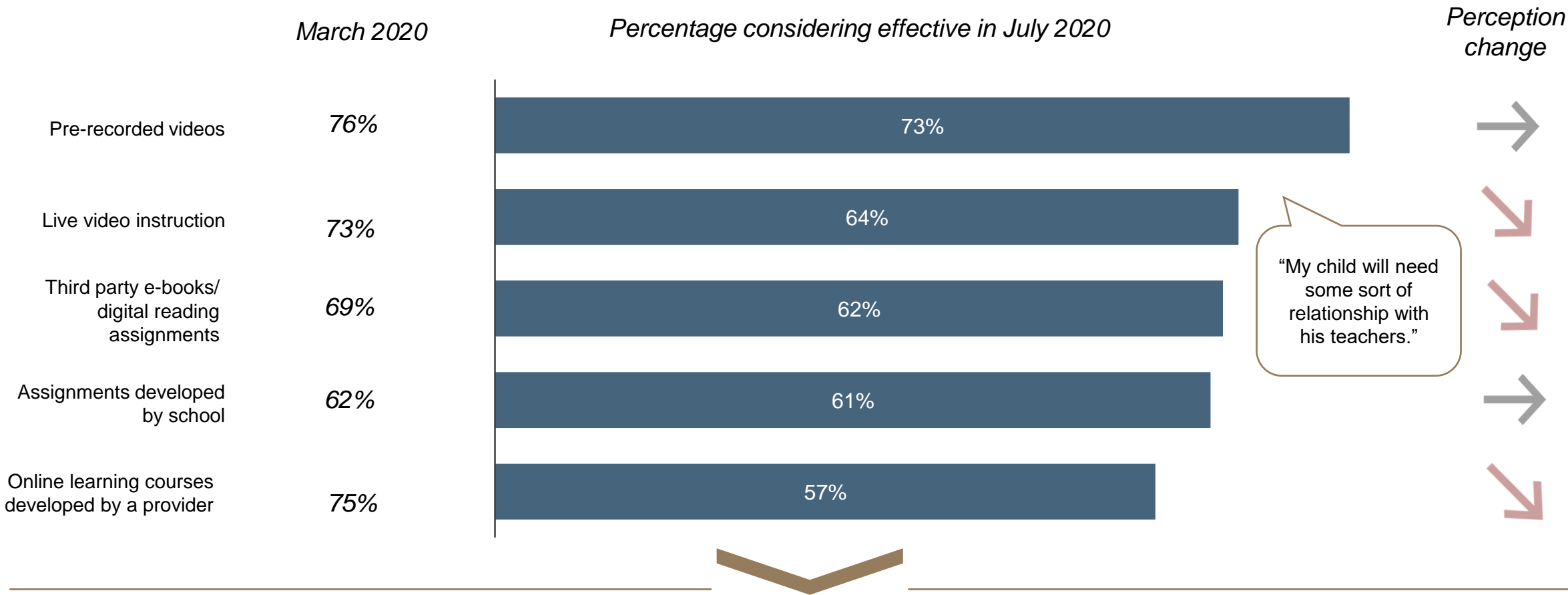
Half of parents believe their child’s social-emotional development was adversely impacted, with 19% indicating a *significant impact*

- “Not being able to socialize took an emotional toll on my child. Her **mental health began to concern me.**”
- “Establishing routines and a schedule is important.”
- “My child’s **social and mental** abilities have been **very negatively affected** by all of this.”
- “I’m concerned about the health risks of being exposed to Covid if in class, as well as the **social-emotional impact of not being in school.** It’s an impossible decision.”

Although parents believe that their children fell behind, they believe pre-recorded and live videos are effective remote learning tools

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Top 5 most effective remote learning instructional methods

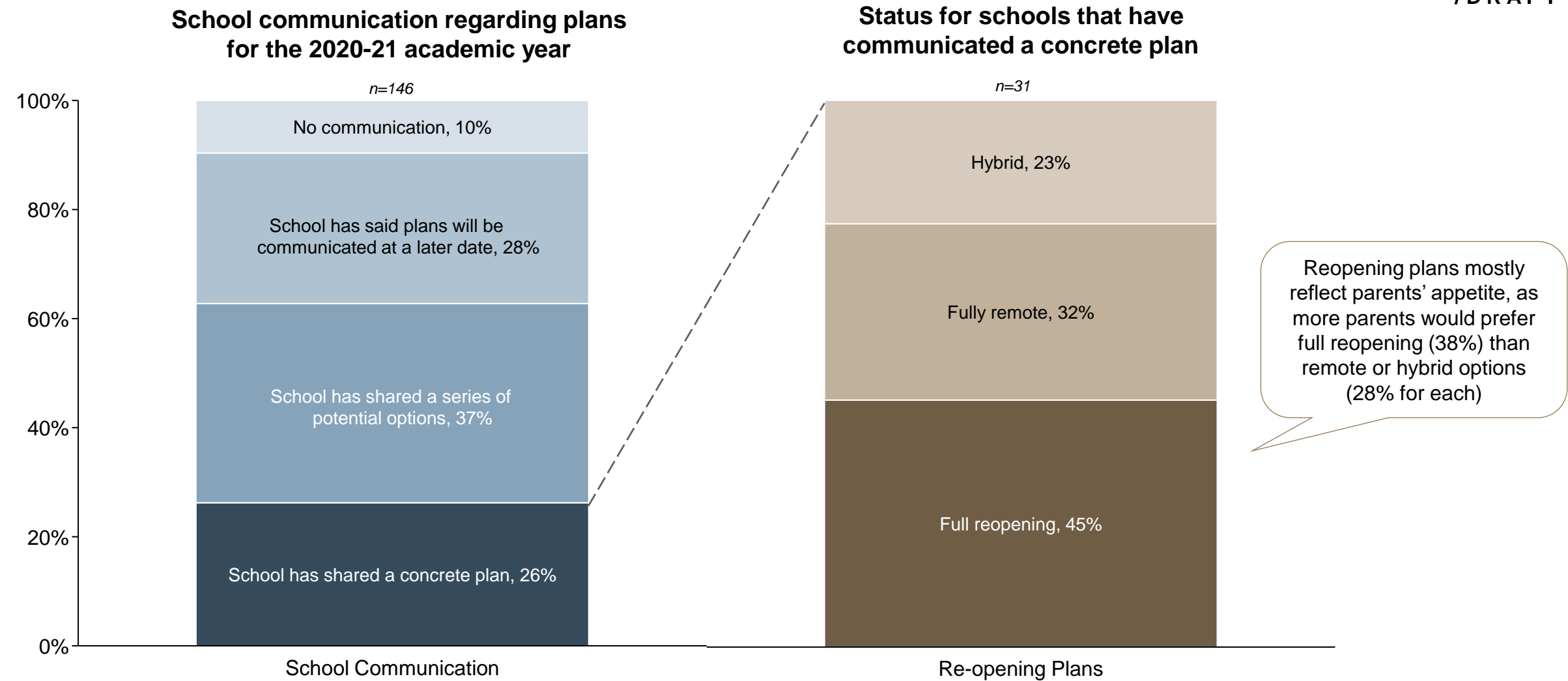


While some faith has eroded, majority of parents find virtual instruction and online assignments to be effective

Question: “How effective were these remote learning supports for your child?”; n=143
Source: Tyton Partners COVID-19 K-12 Education Parent Survey, March 2020; Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

Only 26% of schools have shared reopening plans for the fall; of those with concrete plans, nearly half will reopen for in-person instruction

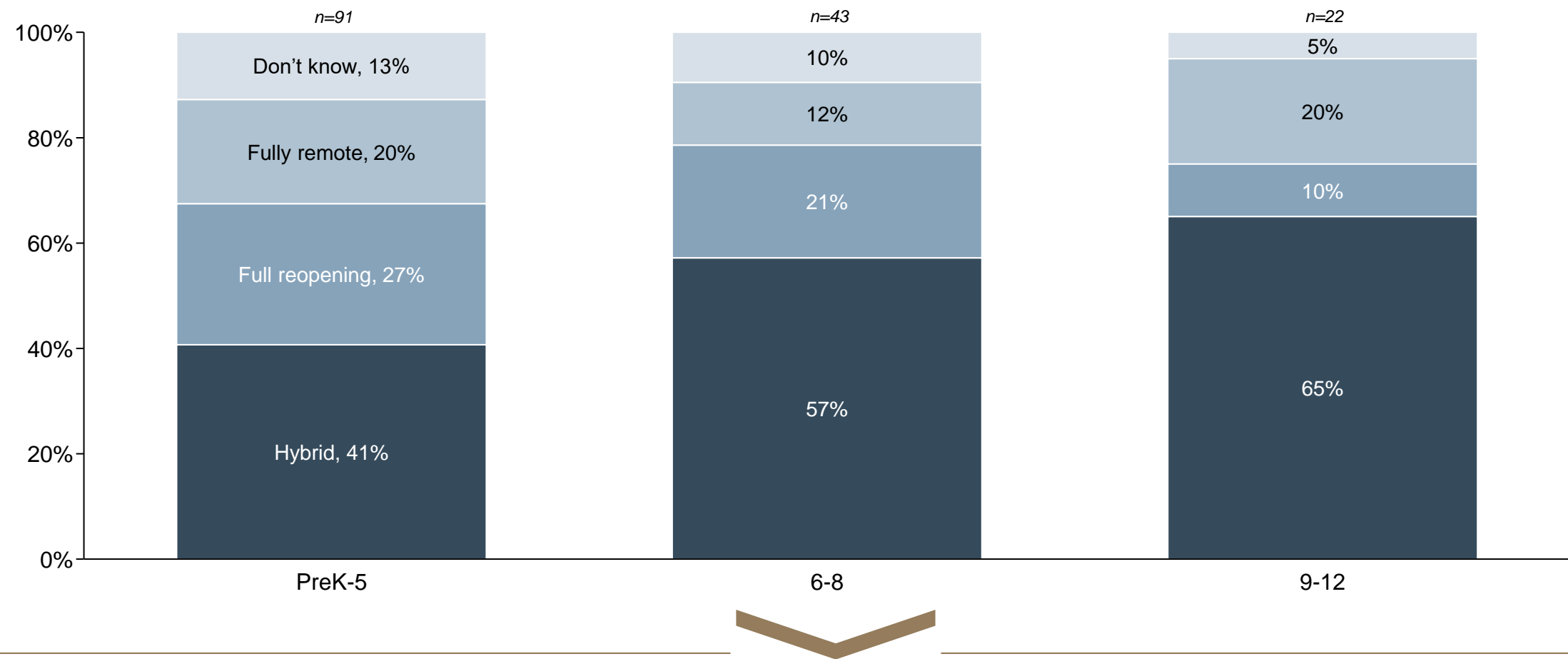
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Parents of younger students are most likely to believe their child’s school will resume in-person instruction; parents of high schoolers expect remote or hybrid

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Predicted reopening plans for schools that have not communicated concrete plans for F20

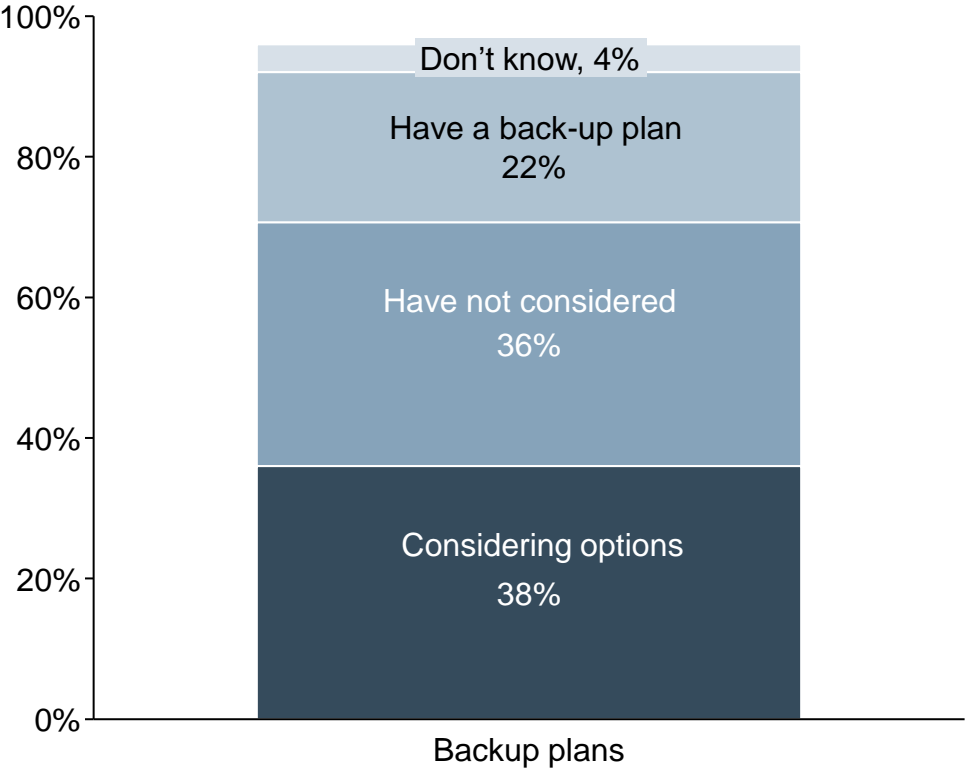


More than two-thirds of parents expect there to be an in-person component to the F20 semester

Given that 74% of schools have not communicated a concrete plan for the fall, parents are actively considering alternative learning options

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Parents considering backup plans for F20



When asked what types of alternatives are being considered....

39% involve
homeschooling

“My husband and I are prepared to alternate work schedules so we can homeschool five days a week.”
– Public school parent, Kentucky

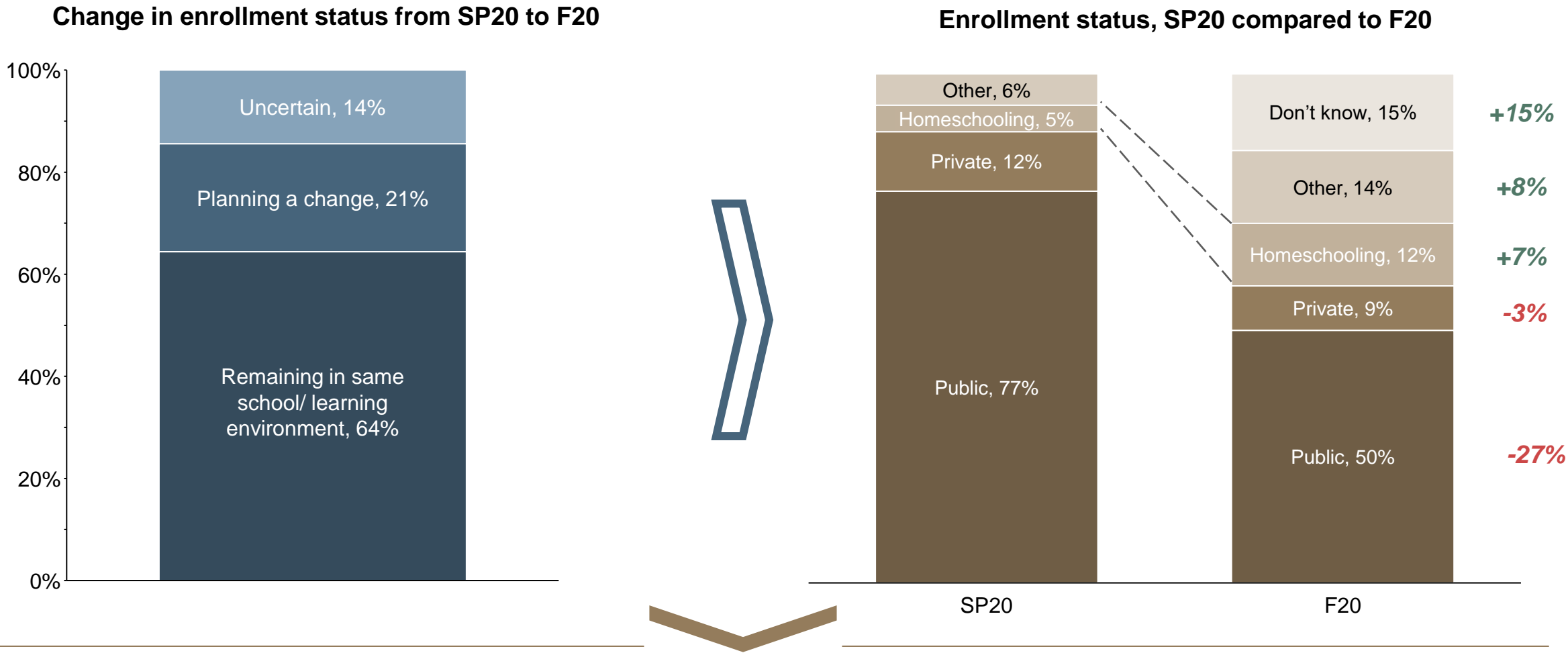
31% involve
virtual schools

“Finding an online accredited school where I can trust he can work at his own pace to meet his needs.”
– Public school parent, Virginia

The final plans communicated by K-12 school districts will have significant implications on K-12 enrollment

Overall, ~64% of parents plan to keep their child enrolled in the same school this fall; 15% are still unsure, and sizable percentage are planning to homeschool

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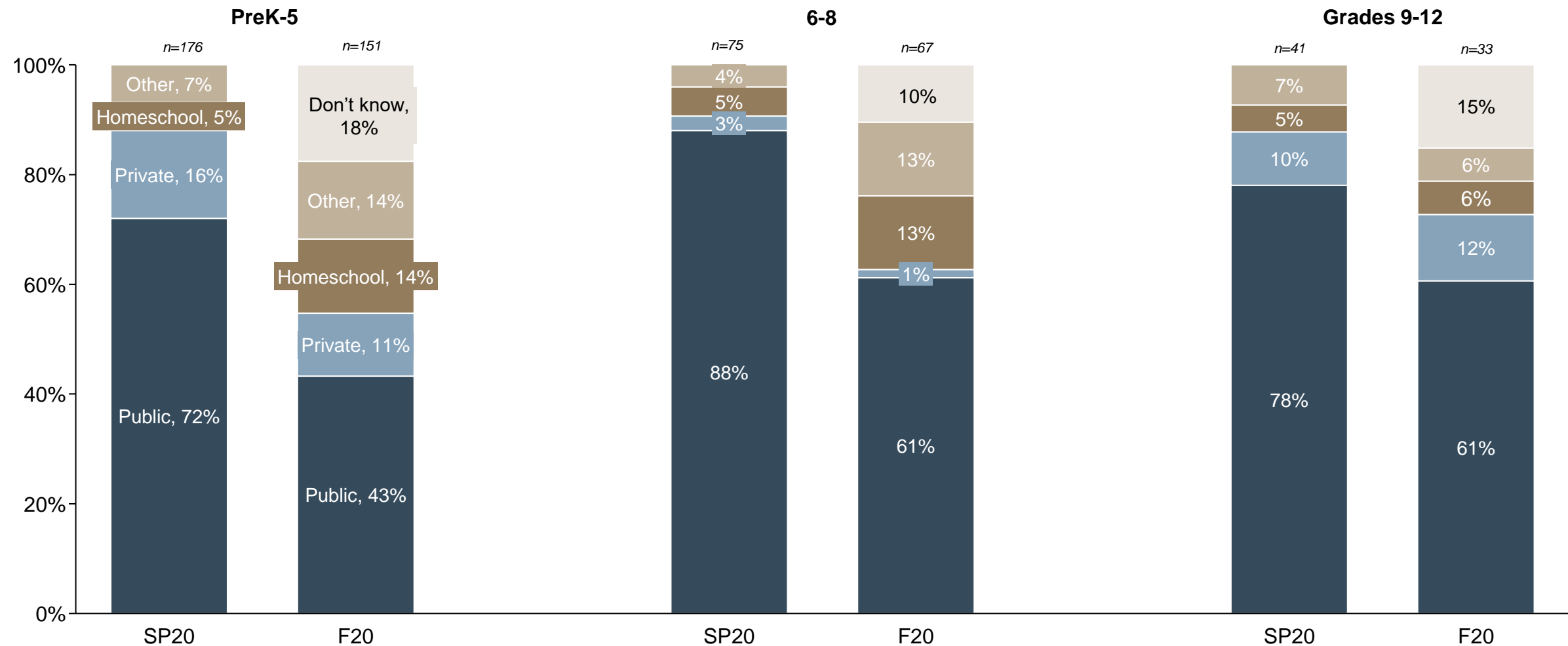
Enrollment changes will have an outsized and adverse impact on public schools

Note: Other includes charter schools, virtual schools and choose not to enroll; Question: "What type of school will your child attend in the fall?;" n=252
Source: Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

While parents of students at all levels are considering alternatives, PreK-5 parents are most likely to enroll children in new learning environments this fall

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Enrollment over time, by grade level



Note: Other includes charter schools, virtual schools and choose not to enroll
Question: "What type of school did your child attend this past year?; What type of school will your child attend in the fall?"
Source: Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

Key factors impacting parents' enrollment choices are their child's mental health and physical safety; they predict a challenging academic experience regardless

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Key factors playing into enrollment decision-making

Parents believe remote learning has a negative impact on students' mental health...

- "My child's **mental health** has been significantly impacted by being home so long, so I hope he can return to school soon."
- "The lack of in-person education is going to be a **detriment to the social and emotional well-being** of my children."

...but in-person classes pose a risk to health and safety

- "There is **no distinction between students whose parents are trying to follow safety protocols and parents who are actively defying safety protocols**. The students are just thrown together."
- "I'm more concerned about him **becoming ill and long-term health effects** than about his education."

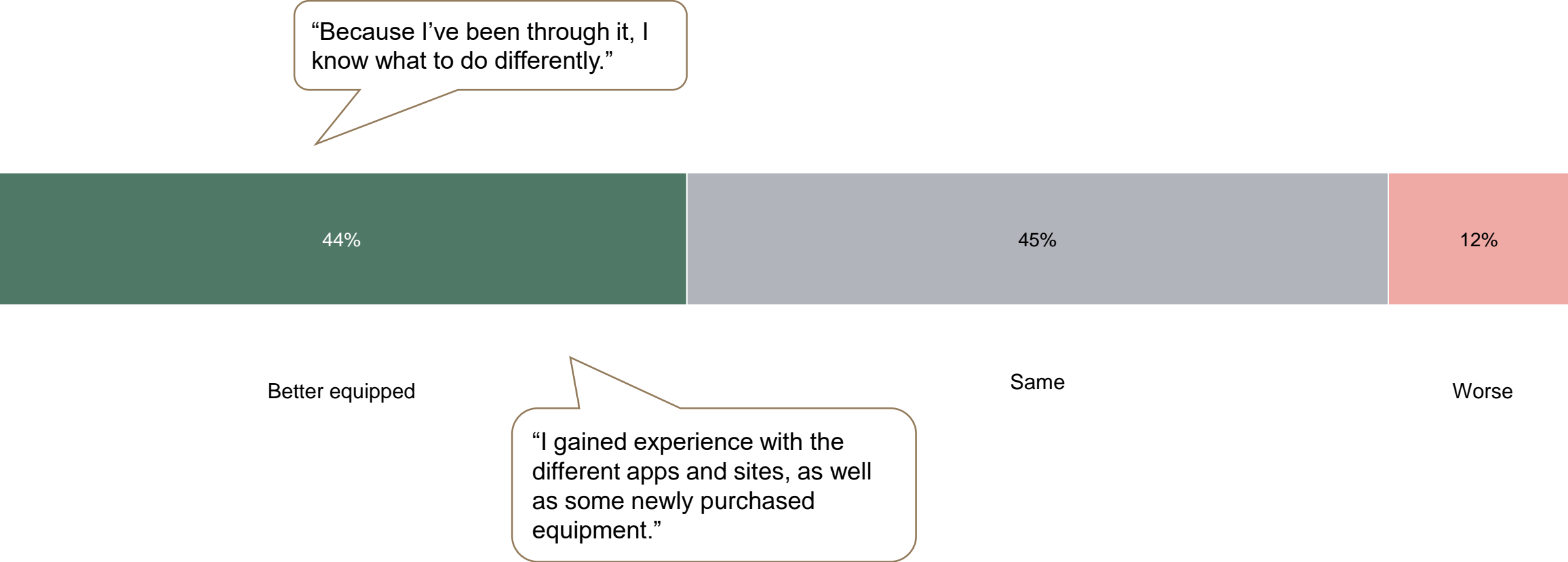
Regardless of setting, parents expect students to have a difficult academic semester

- "I think it will be a rough year and students **won't learn what they need to.**"
- "The constant worry over masks and social distancing will distract from what need to be taught."
- "It will be challenging starting with a teacher they don't know, with **none of the routines and scaffolds** that the teachers build in through the year in place."

Despite expected challenges, parents feel better equipped to support their child’s learning this fall, owing to their experiences with remote learning in the spring

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How parents feel about supporting their child's remote learning as compared to six months ago



Question: “If your child ends up in a remote learning environment this fall, do you feel better equipped to support your child as compared to six months ago?” n=137
Source: Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

In the fall, most parents plan to rely on free online resources and textbooks purchased outside of school to support their child’s academic growth at home

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Parent resource or support	Expected usage*	Parents most likely to adopt
Free online learning materials	52%	PreK-5 (58%)
Purchased textbooks or literature (outside of school)	27%	PreK-5 (34%)
Purchased physical learning resources	21%	PreK-5 (25%)
Purchased online learning materials	19%	PreK-5 (22%)
Free tutoring	11%	Evenly distributed
Purchased in-person tutoring services	5%	PreK-5 (7%)
Purchased online tutoring services	3%	9-12 (7%)

Note: *Expected usage includes those who selected “daily usage” or “at least a few times weekly”

Question: “With what frequency do you expect to use the following at-home supports this fall?” n=137





Source: Tyton Partners COVID-19 K-12 Education Parent Survey, July 2020

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16

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Our clients span the education ecosystem

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