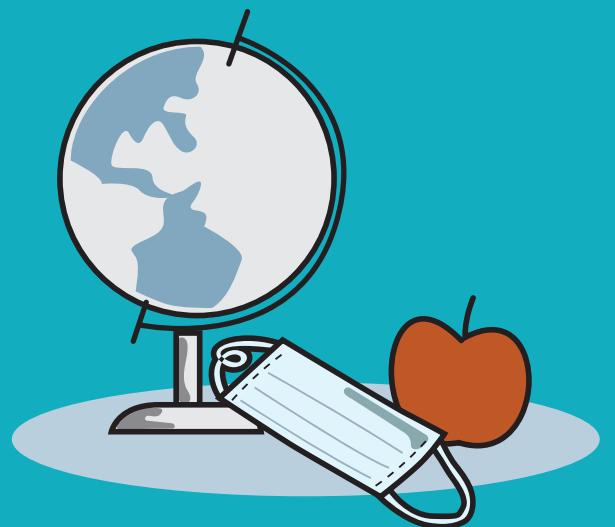


SCHOOL PART 3 DISRUPTED

The Future for Supplemental
Learning Pods

October 2021



Background

In December 2020, Tyton Partners, with support from the Walton Family Foundation, initiated a three-phase study to explore the impact of the COVID-19 pandemic on the K-12 ecosystem and resulting shifts in parents' decision-making regarding their children's education. Through our research, conducted between November 2020 and July 2021, we examined the scale and scope of alternative school types, such as learning pods, microschools and homeschooling, and the impact of COVID-19 on their acceptance and trajectory. We also studied the impact of school shifts on parent perceptions and expectations of education quality and the emergence of and potential sustainability of a new component of the K-12 ecosystem – supplemental learning pods (SLPs).

WALTON FAMILY
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In the first two phases of our research, we saw parents assuming greater agency over their children's education and traditional models of K-12 education, such as public and private schools experiencing marked decreases in enrollment while homeschooling numbers soared and other alternative school types gained traction. SLPs – in which children participate in small group learning experiences in addition to their core school – emerged as a model and gained traction. We learned that parents who turned to alternative school types or supplemental models reported higher levels of satisfaction with their children's education than those who did not, leading us to believe that these models may continue to be a part of the K-12 ecosystem not only in academic year 2021-22 (AY21-22), but into the future as well.

In this third and final phase of our study, based on a nationwide survey of 3,000 parents conducted in July 2021, we review the role that SLPs played for parents during AY20-21, exploring which groups of parents turned to them and the goals they were trying to achieve. We also examine parents' future expectations for SLPs and their child's overall educational experience once the effects of COVID-19 subside.

Acknowledgements

The findings and conclusions in this report are those of Tyton Partners and do not necessarily reflect positions or policies of the Walton Family Foundation. We are particularly grateful for the leadership and support from the Foundation's K-12 program officer Michele Leardo.

We are grateful to our graphic designer, Tara Pastina of Honeycomb Collaborative, and our writer and editor Lisa Wolfe. Both were patient and understanding partners who were critical to driving the execution of this publication.

Finally, we would also like to thank the parents who contributed to the more than 8,500 responses we collected over our three surveys and the school founders, executives and thought leaders we interviewed during this process. As we continue to move beyond the disruptions brought on by the COVID-19 pandemic, we are excited to explore the ways the shifts parents made in their children's education will bring about sustainable positive change in the K-12 ecosystem.

About Tyton Partners



Tyton Partners is the leading provider of strategy consulting and investment banking services to the education sector and leverages its deep transactional and advisory experience to support a range of clients, including companies, foundations, institutions and investors.

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Research methodology, including demographics and response rates, are available in the Appendices on page 20. If you have any questions on the publication or would like to further discuss any K-12 topics, please contact Adam Newman at anewman@tytonpartners.com.

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Introduction

It's hard to believe families have been coping with the impact of the COVID-19 pandemic for more than 18 months. We've gone from what we thought was a temporary closure of schools in mid-March 2020 to a second back-to-school season with uncertainty regarding potential virus outbreaks coupled with an ongoing debate about masks and other mitigation measures. Parents are continuing to balance ensuring their children are on track academically, developing socially and emotionally, and learning in a safe environment with the demands of daily life. Our three-phase research study examines the impact of the COVID-19 disruption from December 2020–July 2021 and looks at the changes parents made in their children's education during academic year 2020-21 (AY20-21) and their potential impact in the future.

In part one of our series, [School Disrupted Part 1: The Impact of COVID-19 on Parent Agency and the K-12 Ecosystem](#), published in May 2021, we explored the impact on parent decision making as they navigated life under lockdown and the sudden shift to remote learning. Fifteen (15) percent changed their child's school for AY20-21 – a rate estimated to be 50 percent higher than pre-pandemic – in search of offerings to better support their child's needs during COVID-19.¹ Public and private schools saw student enrollment declines estimated to be in the millions, while homeschooling boomed. In addition to homeschooling, some parents turned to learning pods² or microschools for their child's core schooling. Others left their child enrolled in the school they were attending but also enrolled them in a SLP.

In the second part of our study, [School Disrupted Part 2: The Durability and Persistence of COVID-19-driven Shifts in the K-12 Ecosystem](#), parents shared their motivations for switching or supplementing their child's school, their satisfaction with their choices and their expectations for the future. As AY20-21 continued, the share of parents enrolling their child in SLPs continued to expand. Parents who enrolled their child in SLPs reported the highest rate of satisfaction with their child's education among all parents, regardless of the type of core school in which they were enrolled.

For this final phase of the study, parents provided a deeper articulation of their reasons for adopting SLPs and shared what they discovered through their experiences. In this report, our goal is to provide a snapshot of both parents who adopted SLPs and those who didn't, the circumstances influencing the decisions they made, and their aspirations for the future of their children's education.

1 According to 2018 research on student mobility from the Milwaukee Journal Sentinel, year-to-year school turnover or switching is about 10 percent, although not all states report data.

2 "Learning pods" are small group learning experiences led by an instructor (they are also referred to as "pandemic pods"), that can be held at a home, a community organization or another suitable space. Learning pods can be a child's primary school experience or a supplement. For example, with a supplemental learning pod a child is actively enrolled in a public or private school but participates in a learning pod after (or before) their "regular" school day.

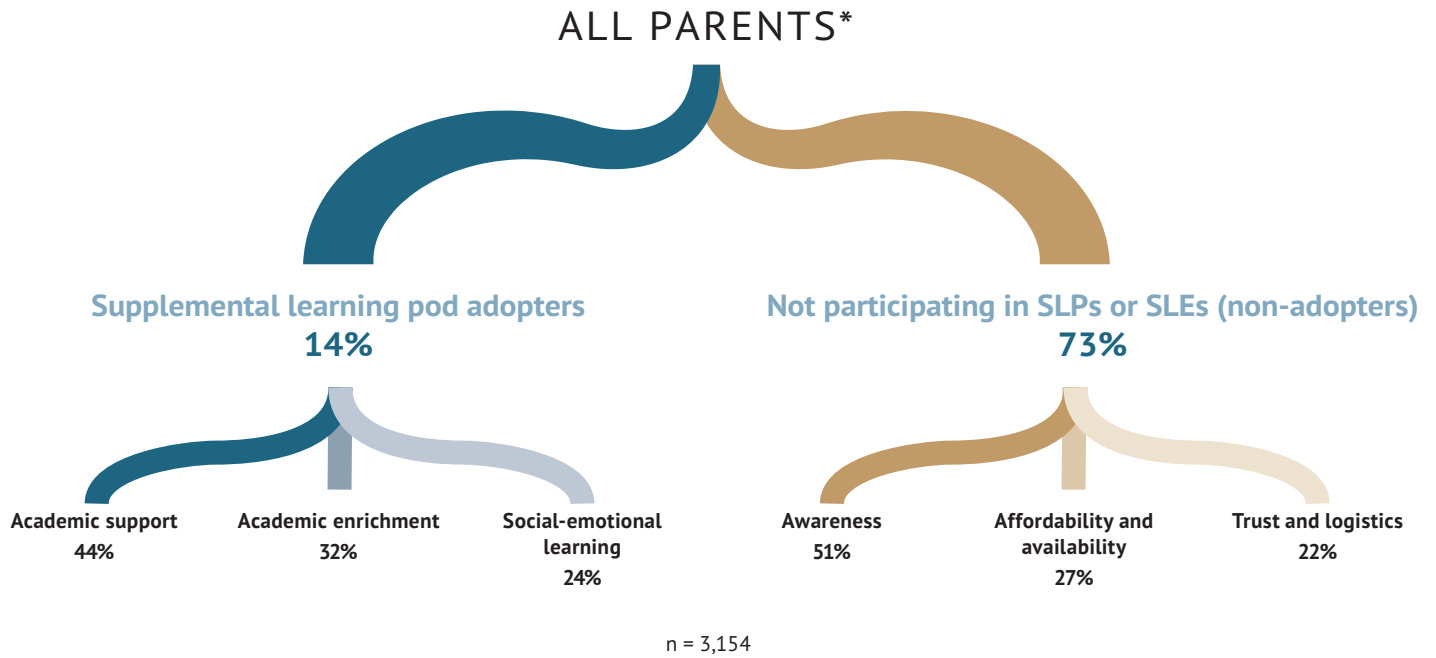
Research highlights: parent preferences, learning pod adoption drivers, future hopes

Building on their high level of satisfaction with their children's educational experience during COVID-19, parents who adopted SLPs indicated these models are likely to continue to play a role in their children's education in the future, particularly if barriers such as cost and accessibility (e.g., local availability, transportation) are addressed. Other key highlights from the third phase of our research include:

- ✍ The number of parents adopting SLPs continued to grow in the spring of 2021, to 14 percent from 12 percent of all parents in the fall of 2020. In addition to this group, another 13 percent of parents enrolled their children in supplemental learning experiences (SLEs) that have similarities to SLPs, but which parents referred to differently, such as group homeschooling and tutoring programs. Although, in aggregate, these groups, representing nearly a third of the population, shared similar educational goals, concerns and perspectives about K-12 schools,³ the focus of this report will be on the parents who adopted SLPs.
- ✍ By late spring of 2021, SLPs incorporated many elements of traditional K-12 education, making it easier for parents to integrate them into their daily routines. More than half were hosted at a school location and facilitated by a certified teacher.
- ✍ Motivation for parents who adopted SLPs primarily fell into one of three segments, depending on the goal they were trying to achieve for their child: 1) Academic Support, 2) Academic Enrichment and 3) Social Emotional Learning. Parents who adopted other SLEs were pursuing similar objectives.
- ✍ More than 70 percent of parents did not pursue SLPs or SLEs for their children. The reasons why also fall into three primary segments: 1) Awareness, 2) Affordability and Availability and 3) Trust and Logistics.
- ✍ Parents who pursued SLPs were more open to other school alternatives; they were three (3) times as likely to have considered disenrolling their child from their core school in favor of enrolling them in a learning pod full time. This pattern also holds for those who adopted other SLEs.
- ✍ All parents have similar priorities when considering SLPs in the future. Whether they used them or not in the past, cost is the most important variable influencing future demand.
- ✍ Parents who adopted a SLP or SLE for their children last year – compared to those who did not – have different expectations for AY21-22. Many would like to see more hybrid or flexible learning options. They are also concerned about losing some of the positive aspects and practices that emerged from their child's educational experience during the pandemic.

³ See Appendix starting on page 19 for more details.

Parent segmentation by SLP participation and rationale



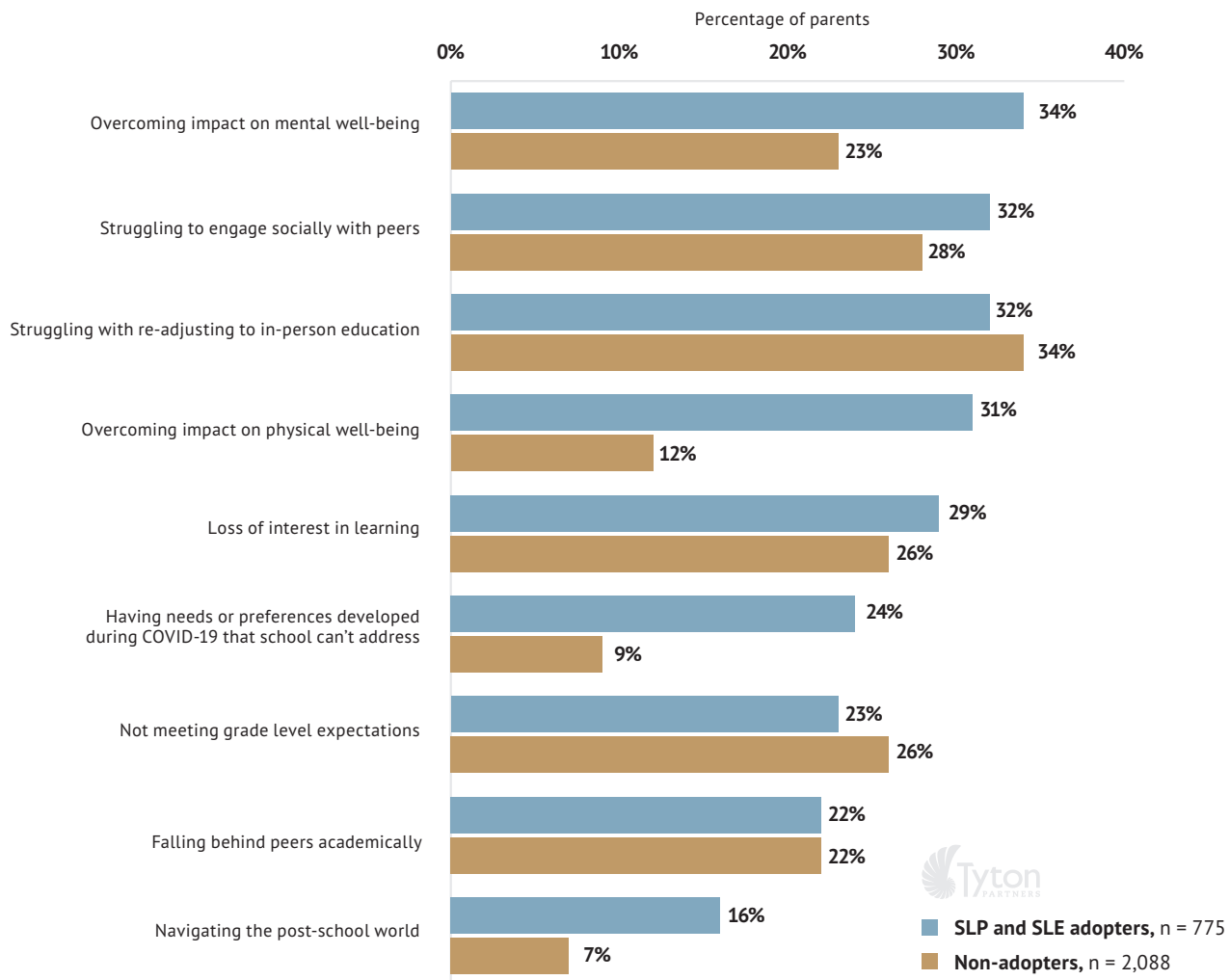
*Graphic excludes 13% of parents who adopted other supplemental learning experiences (SLEs). Attitudes and behaviors of other SLE adopters followed similar patterns as those using SLPs



Parent demand shapes evolution of supplemental learning pod market during COVID-19

As the disruption to classroom learning continued through AY20-21, many parents realized that not all their child's needs were being met by remote or hybrid learning. Nearly a third were concerned about the impact of COVID-19 on their child's mental health and believed their child would struggle to engage socially and readjust when schools reopened. As illustrated below, similar numbers of parents were also worried their children had lost interest in learning or were not meeting grade-level expectations.

Greatest challenges parents expect children to face when returning to school in fall 2021

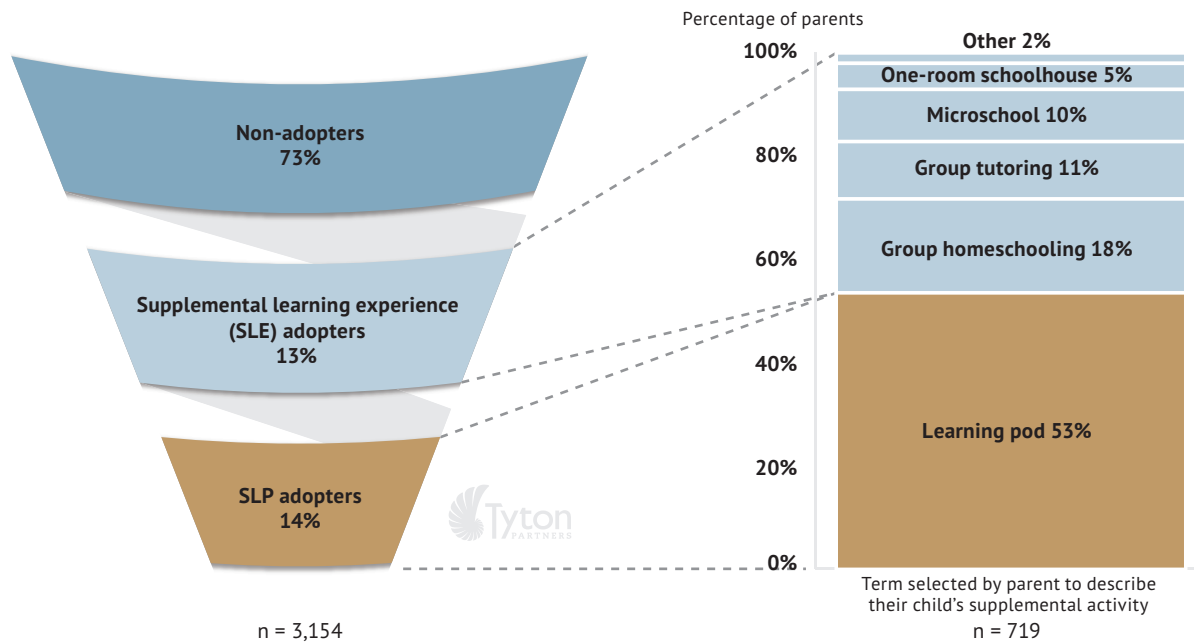


Parents looked in their communities and beyond to discover and, in some instances, create opportunities to support their children’s academic and social emotional development. Learning pods experienced a small boost as a full-time school option during COVID-19. However, parents looking for a way to supplement their children’s experience during remote and hybrid learning resulted in the emergence of SLPs, which garnered considerably more participation than their full-time counterparts.

Parents who turned to SLPs were more concerned than other parents about their child’s mental and physical well-being, as well as believed their child had needs that arose during COVID-19 that schools were not adequately addressing. Many parents felt that virtual environments did not provide their child with enough support and feedback and there were fewer opportunities to ask questions. Others had children who missed their friends or participating in school clubs and athletics, impacting their academic motivation. Parents worried their children were dealing with higher levels of anxiety and/or depression and felt compelled to seek out environments that would provide comfort and a sense of normalcy.

As the graphic below reveals, 27 percent of parents elected to adopt models that supplemented the education their child received through their core school, with 14 percent of this group adopting SLPs and an additional 13 percent turning to other SLEs. As a model existing somewhere between a microschool and more traditional “after-school” programs, SLPs garnered significant attention. In addition, they fall into the emerging narrative of “unbundling” education that is already prominent in the postsecondary environment.

Participation in SLPs and other supplemental experiences, spring 2021



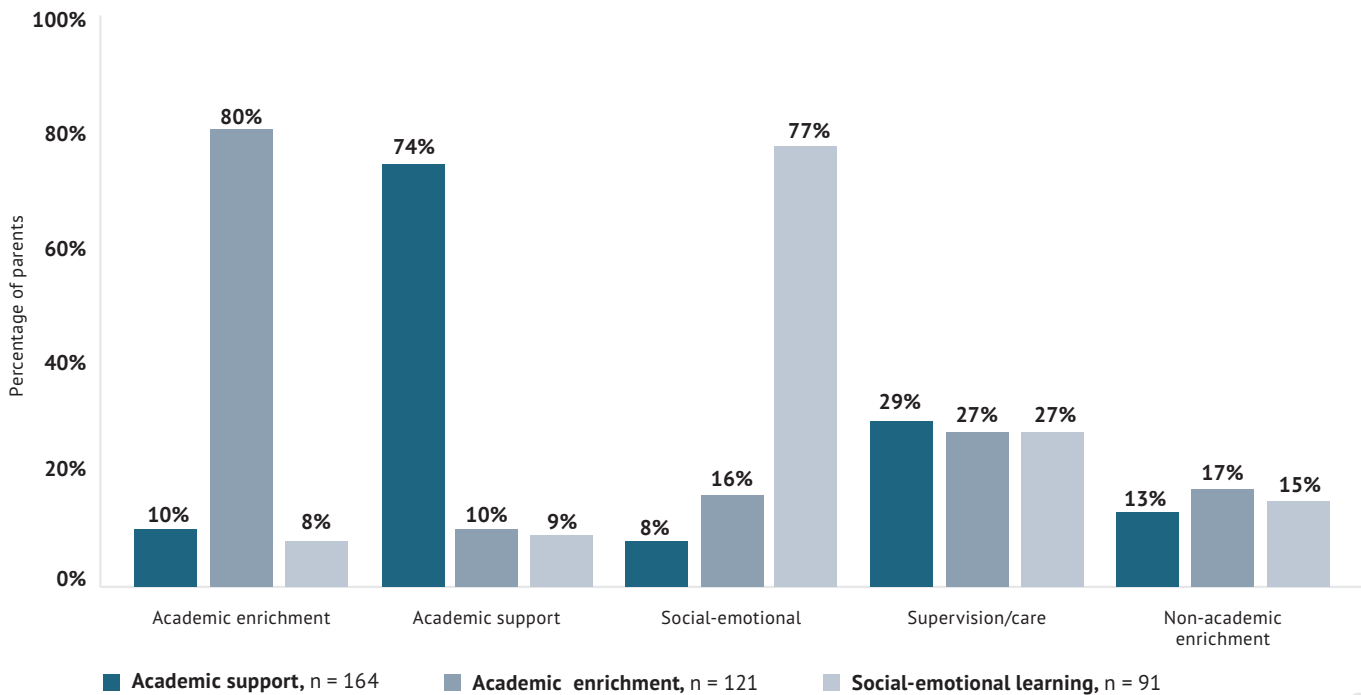
Parent motivation for adopting SLPs

In this phase of our study, we explored parent motivation for adopting SLPs. Using cluster analysis,⁴ three distinct segments of parents who adopted SLPs emerged:

- 1. Academic Support:** Parents whose primary goal was to provide their child with academic support.
- 2. Academic Enrichment:** Parents who were looking for academic enrichment for their child.
- 3. Social Emotional Learning:** Parents who wanted to support and enhance their child's social emotional development.

⁴ More data on the cluster analysis can be found in Appendix 20.

Parents' rationale for enrolling their child in a SLP, spring 2021



The complete list of all objectives and the corresponding cluster analysis methodology can be found in the appendix beginning on page 21.



Parents in the Academic Support segment were balanced in their concerns. They were worried their child was experiencing a loss of interest in learning (36 percent) or struggling to engage with peers (36 percent) and were concerned about their child's mental well-being (35 percent). Those in the Social Emotional Learning segment had their child's mental well-being as top of mind (42 percent) and were afraid their child was struggling to engage with peers (34 percent). Parents in the Academic Enrichment segment thought their child was having difficulty readjusting to in-person learning (46 percent), struggling to engage socially with peers (36 percent) and worried about their child's physical well-being (35 percent).

Consider parents whose elementary-age child is consistently getting good grades during remote learning but increasingly spending time alone, feeling down and not wanting to engage with others. Situations like this and others resulting from the isolation of COVID-19 caused parents to express serious concerns about the social emotional and mental health of their children. Many found solutions in SLPs offered by commercial providers, where for a fee, a company would match their child with others their age who shared their interests and whose families had similar risk-tolerance when it came to COVID-19. These SLPs provided a safe space for social interaction and support. However, although most children enjoyed the experience and would want to continue in AY21-22, 20 percent of parents don't know if they will be able to continue to afford it.

In terms of the aspects of SLPs they were most satisfied with, parents in both the Academic Support and Academic Enrichment segments ranked the quality of the teacher/facilitator as most valued, potentially because they played a role in their selection and/or valued the level of communication and transparency that existed in the model. In fact, nearly 50 percent of parents felt better informed about their child's

activities and academic progress through their SLP than through their regular school. Parents in the Social Emotional Learning segment were most satisfied with the quality of care their child received from the SLP while they were at work.

Additional parent demographic dynamics

In general, higher-income parents fell into the Academic Enrichment segment, while those with lower incomes were primarily in the Academic Support segment. Parents whose primary goal was Academic Support were most likely to have a child attending public school, while those looking for Academic Enrichment or Social Emotional Learning were more likely to have a child attending private school.

Overall, income level is correlated to adoption of SLPs. Parents with household incomes greater than \$150,000 were the most likely to have their child participate in this learning model, while no parents with annual household incomes under \$35,000 reported using them. Other characteristics of parents whose children participated in SLPs at higher rates included having their child enrolled in a private school, living in an urban locale and possessing higher levels of educational attainment.⁵

Having turned to SLPs during AY20-21, most adopters possess a very positive perspective on their potential; for some, their child thrived in ways they had not before because of the individualized support and learning environment facilitated by the pod. This has pushed these parents to think of not only the potential impact SLPs could continue to have on their child's life, but also of the possibility and potential benefit of non-traditional school options, such as homeschooling and microschools.

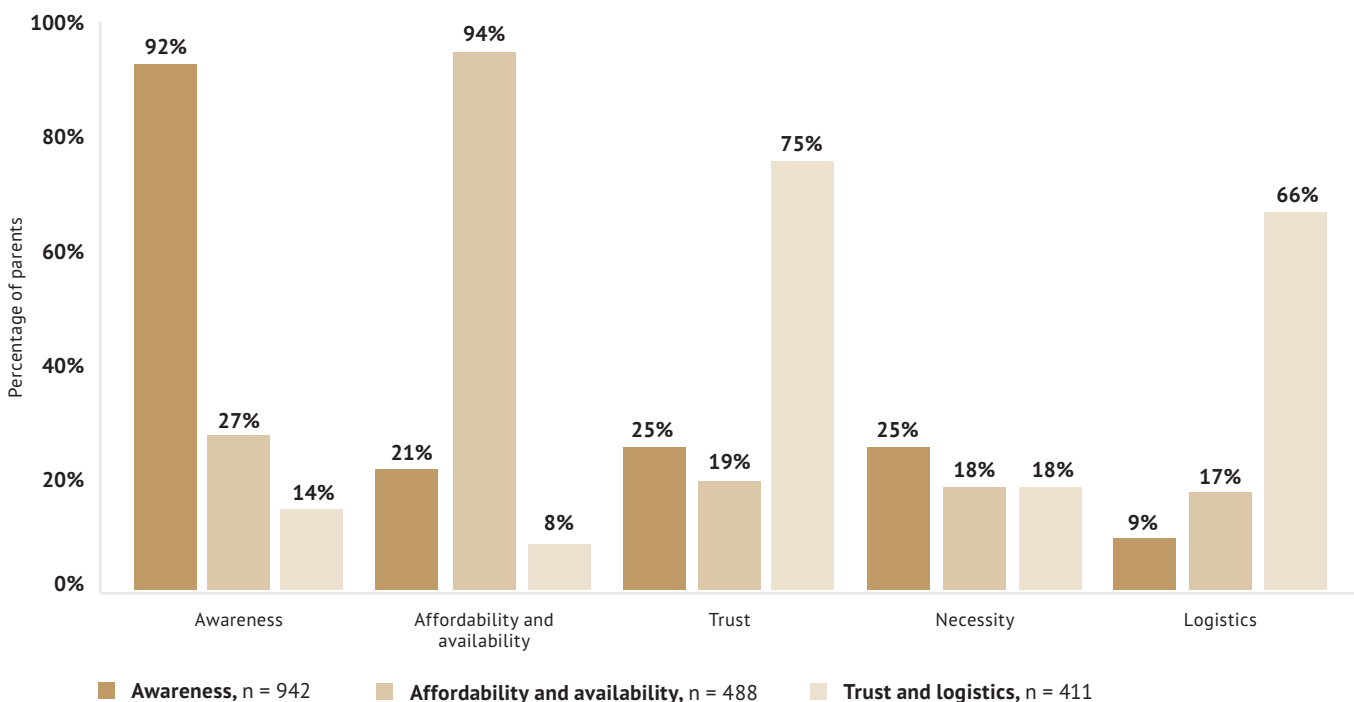
Barriers to supplemental learning pod participation

While parents who adopted SLPs largely reported positive experiences and an interest in continuing in the future, the majority of all parents (73 percent) didn't pursue any supplemental learning experiences for their children. Parents' reasons for not adopting SLPs reveal three distinct segments, drawing on a similar cluster analysis (and highlighted below).

1. **Awareness:** Parents were not aware of SLPs or did not know others who participated.
2. **Affordability and Availability:** Parents could not afford a SLP or there were none available in their area.
3. **Trust:** Parents had concerns about SLP quality or efficacy and/or could not access one easily.

⁵ 63 percent of SLP adopters hold a bachelor's degree or above compared to only 45 percent of non-adopters

Parents' primary barrier to enrolling their child in a SLP, spring 2021



The complete list of all barriers and the corresponding cluster analysis methodology can be found in the appendix beginning on page 23.



The majority of respondents who did not have their child participate in a SLP reported that it was because of lack of Awareness; this segment is also the least likely to enroll their child in a SLP in the future. Parents in the Trust and Logistics segment have the highest income levels of the group as well as the highest level of educational attainment. These parents might have had the flexibility and ability to support their children during remote and hybrid learning. In addition, they might have had questions about the academic quality of SLPs. Those in the Affordability and Availability segment are in the lowest income group and have the lowest levels of educational attainment; they also are the most likely to enroll their child in a SLP in the future. Parents in this segment may have had concerns about their children's social emotional health and academic development but did not know what they could or should do outside of what their local school offered or if they could afford available opportunities.

For many parents, the pandemic resulted in job losses or caring for family members who fell ill, factors that proved overwhelming and crowded out other activities, such as finding or being able to fund out-of-school experiences for their children. In this scenario, parents may have provided support to a child struggling with remote learning, but their main energies focused on ensuring the rent was paid and there was food on the table. Many parents in similar situations shared that they entrusted their children's education to their local school, and although they believe virtual education did not engage their children as much as in-person does, they are hoping they will catch up in the classroom during AY21-22.

If SLPs become a durable component of the K-12 ecosystem and the barriers to parent access and consideration are not addressed, we are further exacerbating the educational equity gaps so many stakeholders across the country are working to close.

The future of supplemental learning pods

While parents who had their children participate in SLPs were largely pleased with their experiences, those who created pods themselves were challenged by the significant time and resources it took to manage a pod. Others who turned to commercial providers still struggled with sourcing, evaluating and paying for the SLP. In the second phase of our study, many said they approached learning pods as a “do-it-yourself” project, with more than 80 percent saying they did not use a commercial provider. The demands they faced were many, ranging from having to hire a teacher and secure a location for the pod to finding other parents to participate and agreeing on a curriculum.

Some parents may have had the connections and resources to support tasks, such as finding a certified teacher. Others may not have known where to begin. Some families have deep connections in their communities and finding other parents to participate in a SLP was an easy task, while others may not have the same relationships.

The good news is that the “do-it-yourself” SLP model evolved, and by spring of 2021, parents reported their pods are managed by many different organizations including local schools (23 percent), parents (17 percent), local companies focused on learning pods (15 percent), tutoring centers or academic enrichment providers (15 percent) and community organizations focused on learning pods (15 percent). Independent of who was managing the SLP, parents said they preferred that they were hosted in a school setting and by the end of AY20-21 more than 40 percent were.

What parents expect from SLPs moving forward

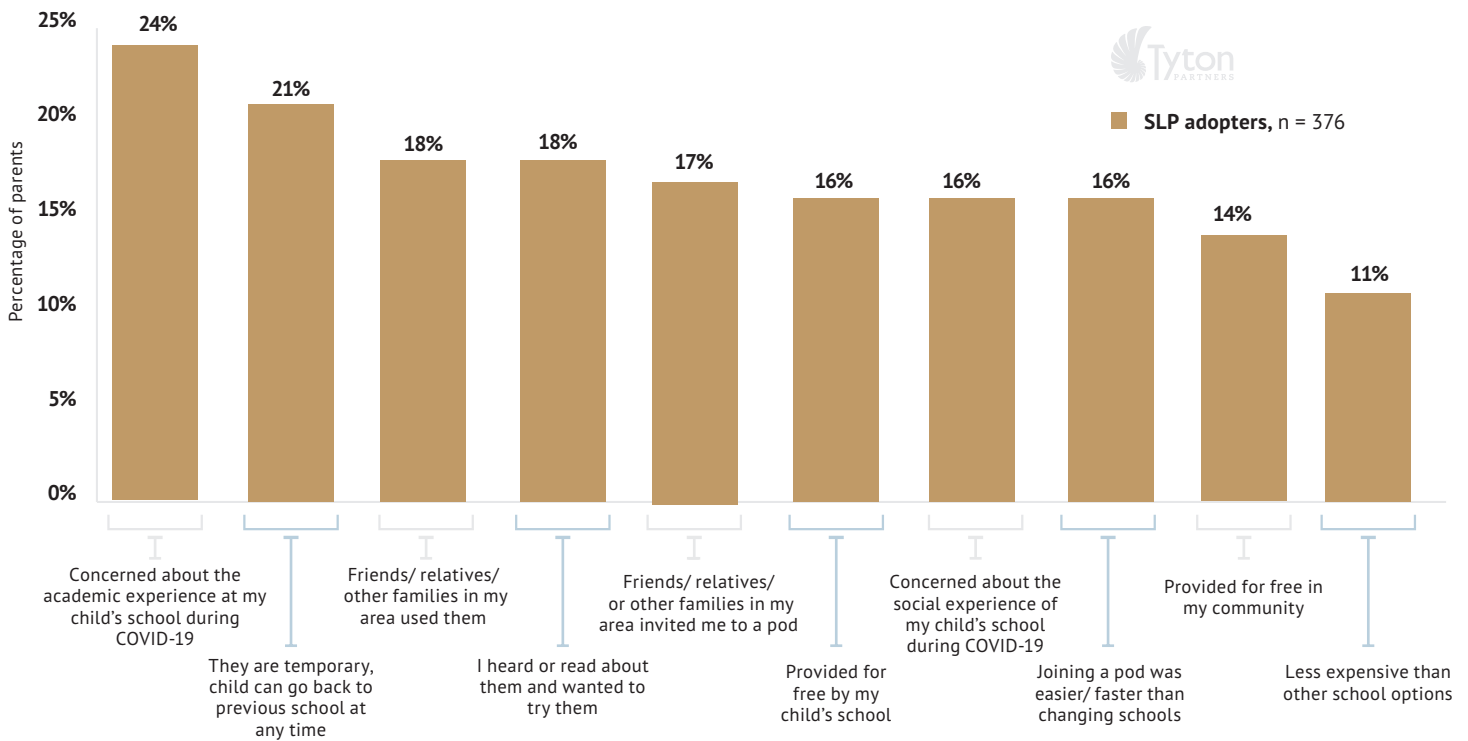
Parent concerns about the future of SLPs include whether their children will have time available to participate once full-time, in-person school returns along with traditional extra-curricular activities, such as clubs and athletics. And, as they have expressed throughout the past year, they are concerned about the logistics and costs of maintaining the supplemental learning pod model in the future.

These issues are not new; they are reflected in the reasons motivating parents’ decisions to adopt SLPs in the first place. As illustrated below, most adopters saw SLPs as an appealing model to mitigate the negative impact COVID-19 was having on their child’s educational experience. One (1) in five (5) parents adopted them in part because they were perceived as a temporary resource and one (1) in six (6) because they were offered to them by their child’s school at no cost.

“Are supplemental learning pods really necessary if a child is attending school full time, in person and doing well academically?”

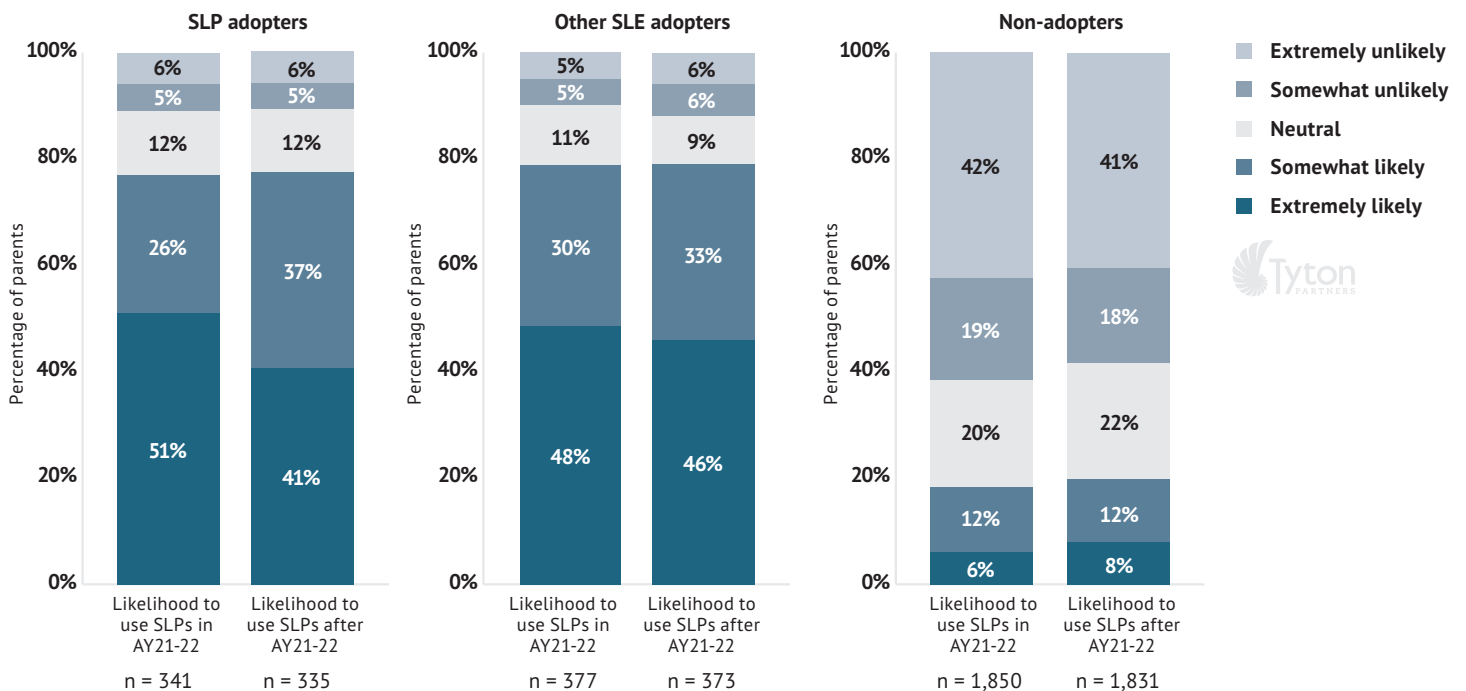
– SLP non-adopter

Factors influencing parents' decision to enroll their children in SLPs, spring 2021



As shown in the following graphic, despite their initial motivation for adopting SLPs, most parents see a continued need for them even now that schools are back to full-day, in-person learning. In fact, parents whose children participated in SLPs or SLEs during the pandemic want the positive aspects of these experiences to continue; nearly 80 percent are likely to consider enrolling their child in a SLP during AY21-22, suggesting some level of persistence for the model.

Likelihood parents will enroll their children in SLPs this year by AY20-21 segment



Both SLP adopters and non-adopters have similar preferences regarding the program model when considering using SLPs in the future. Their willingness to participate in a SLP drops drastically if the cost of the program exceeds \$250 a month. Interestingly, the majority (80 percent) of AY20-21 SLP adopters received some level of financial assistance in spring 2021, including scholarships from the provider of the pod or other organizations (30 percent) and state voucher programs (12 percent).

Presenting a possible challenge for the more entrepreneurial nature of many SLPs, parents generally express a preference for those with attributes that draw heavily on existing school models. They think the optimal model is free, managed by schools and facilitated by certified teachers, delivering six-to-10 hours of program time per week.

While the pandemic revealed there were unmet educational needs that parents, community organizations, private providers and schools pivoted to address, once COVID-19 subsides these needs may shift and be met by different service models and resources. It remains to be seen whether SLPs will continue to offer academic and social emotional support in AY21-22 and beyond that is compelling enough to justify continued investment and growth.

How the supplemental learning pod experience impacted parents' perspectives on education

Nearly 80 percent of parents who adopted SLPs want to see changes, such as more hybrid and/or flexible learning options, as their children return to full-time, in-person school. For some parents, the models adopted during COVID-19 had a strong positive impact on their children's education, with 50 percent feeling better informed about their child's activities and progress than with their core school. More than 30 percent are concerned these benefits might not be sustained post-pandemic.

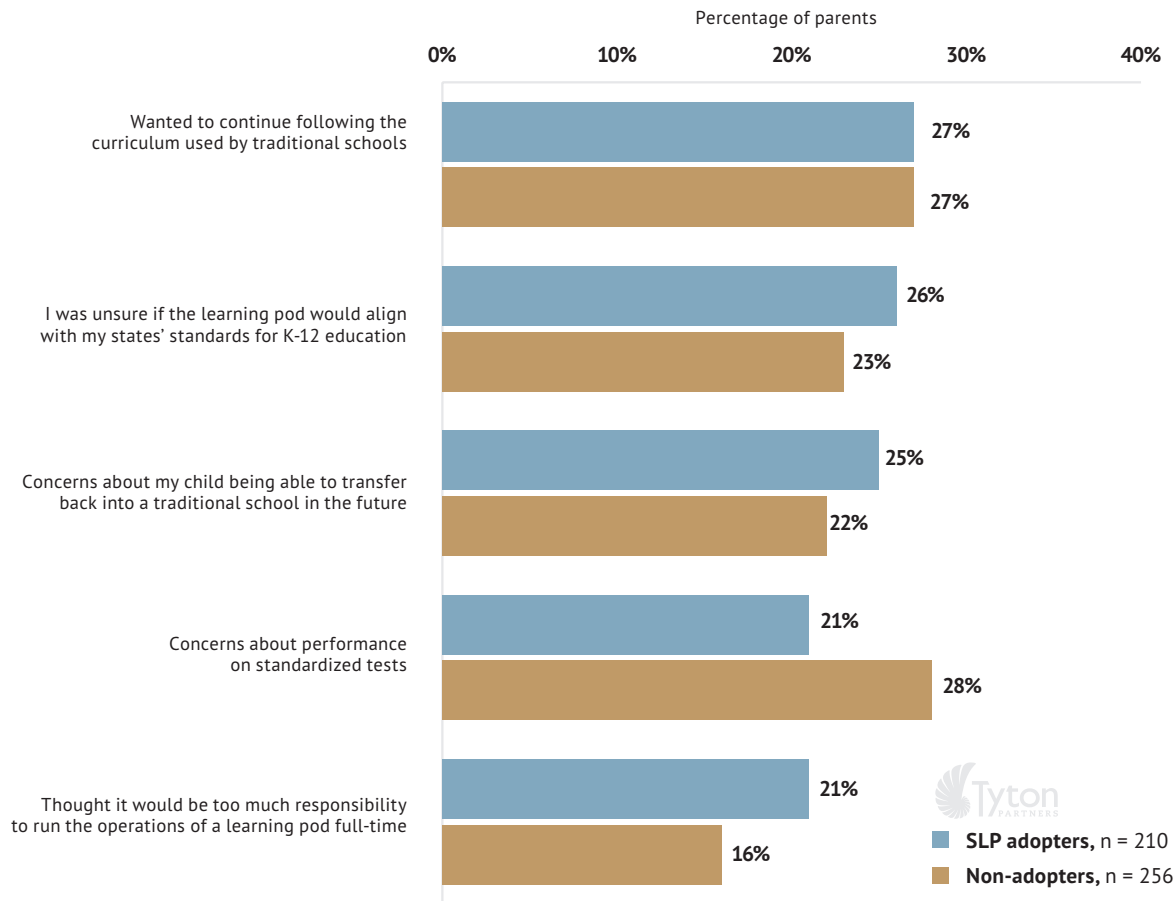
“ Why would people who have been sending their children to public school participate in a supplemental learning pod and have to pay for it? Most people who have children in public school are living on a very limited budget.

– SLP non-adopter

“ The times of the pods are important as we work full time, and it would be hard to get my child to the pod if not located at her school.

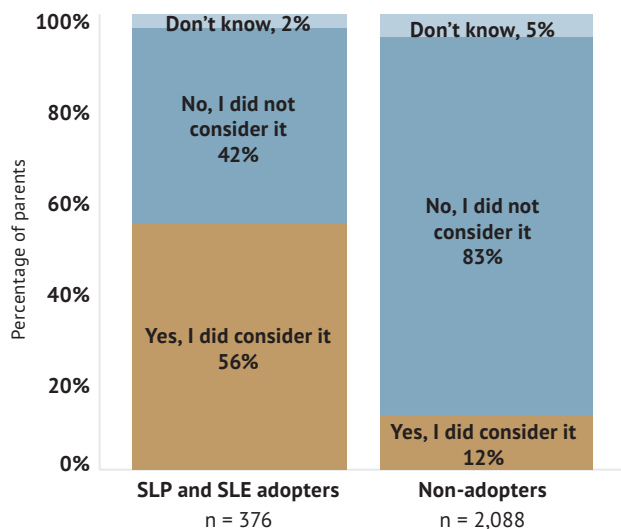
– SLP adopter

Leading reasons why parents who considered a learning pod full-time for their child did not make the switch



The SLP experience also changed parents' perspectives on their children's core educational experience and their openness to considering alternatives. As highlighted below, parents who adopted a SLP are four (4) times more likely than other parents to have considered disenrolling their child from their core school and enrolling them in a learning pod full time.

Parents' perspective towards disenrolling a child from their core school to enroll them in a learning pod full-time



Those who considered disenrolling their child from a public or private school in favor of a learning pod – but didn't – were worried about their child's performance on standardized tests (30 percent) and their ability to continue with their school's curriculum (28 percent). Other factors influencing why parents did not switch to a learning pod as a core school option for their child are detailed below.

The number of parents entertaining the idea of disenrolling their child signals a strong willingness for change and exploration. It reinforces the potential for new models – whether SLPs or others – to continue to grow and evolve and the notion that post-pandemic parents may be more open to credible and compelling alternative models.

Conclusion

At the outset of this research, we asked the question, “Learning pods: fad or future?” During the past year, parents shared great insights into the role that learning pods, particularly SLPs, played in supporting their children's education during COVID-19, why they did or did not adopt SLPs and their expectations for education moving forward. The disruption of the pandemic has increased parental involvement in education and transformed their expectations for traditional school models, particularly for parents who adopted SLPs. The question we should ask now is, “How will the K-12 ecosystem evolve from here and what role will SLPs play?”

As schools strive to achieve a new “normal,” the evolution of SLPs will likely be impacted by whether parents continue to see gaps in their children's educational experience that are not being addressed by traditional school offerings. If they do still see gaps, the pandemic may have provided them with the motivation and tools to address them on their own or push the existing system to provide different types of support.

There are various scenarios that could play out regarding SLPs. In one, they could fade away, resulting from both the unique circumstances surrounding the pandemic and the operational challenges of developing a distinct, viable supplemental model. With parents concerned about the cost and sacrifices of supporting these models (e.g., working different hours, taking on another job, tapping into savings) and lack of availability and access in many communities, SLPs may become a relic of the COVID-19 period.

Another possible outcome is a scenario where traditional schools absorb SLPs. Parents may more aggressively exert their expectations post-pandemic and start to demand more from their child's school, such as more tailored learning paths, personalized support or increased focus on whole child development. Schools might use the lessons learned during these challenging times to evolve their available offerings to incorporate the positive aspects of SLPs and improve access to various services and programs. Considering the role of traditional schools in our society, they are uniquely positioned to level the playing field when it comes to access to the SLP experience.

At this point, it is hard to know what the future holds for SLPs – let alone when COVID-19 will no longer have an impact on our daily lives – but these scenarios raise numerous questions for consideration. When thinking of child and parent needs in the future, it is important to consider what – if any – aspects of SLPs become a more established, expected part of traditional school offerings and how they would

be integrated into an already overwhelmed, resource-challenged school environment. If the value SLPs offer is not unique enough to support their continued existence as a stand-alone model, it is still critical to consider the qualities that drove parent satisfaction and ways schools – or other organizations and partners – can equitably offer similar academic and social emotional learning experiences to all students across all communities.

If SLPs become a more permanent part of the K-12 educational ecosystem, eventually measures for parents and others to evaluate quality and outcomes will need to be established. Third-party organizations should consider the role they can play in supporting and establishing metrics of quality for evaluating the success of SLPs so that parents and others can make informed decisions about participating in and supporting them. This is particularly relevant to policymakers and funders who will need to ensure that parents participating in SLPs are protected and, at the same time, the growth and accessibility of SLPs are nourished.

Regardless of which – if any – of these scenarios plays out, our research reveals that there is a fairly significant group of parents who are looking to supplement their children’s educational experience. They are not necessarily interested in moving away from their child’s core school, but rather looking for the opportunity to choose from a broader menu of options that best meet their child’s needs, both academically and social emotionally. Careful exploration and thoughtful decision making about the best way to support the sustenance, scalability and growth of SLPs could lead to a new model for learning where they become an accepted part of the K-12 educational ecosystem and a common part of children’s educational experiences.

Appendix

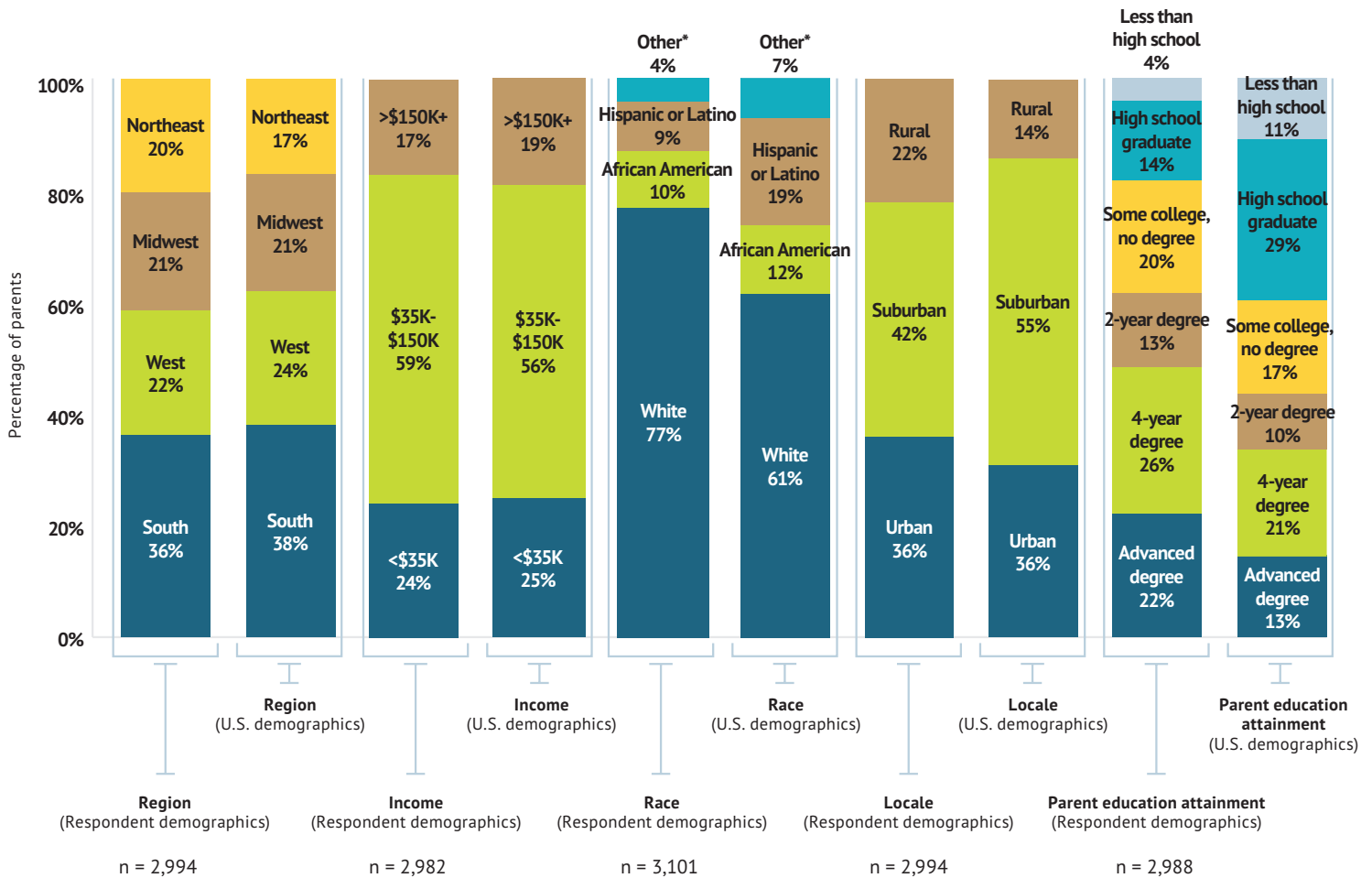
Survey methodology

The survey that informed this publication was launched in June 2021 and collected more than 3,000 respondents from K-12 parents across the U.S. The survey was launched and administered by Qualtrics via online panels to source survey participants. Tyton Partners established quotas based on selected demographic criteria to ensure that the sample was representative of the U.S. population across key dimensions, including the following:

- Income level
- Geographic region
- Locale (e.g., urban, suburban, rural)
- Child grade level

Other demographic data, such as race and parents' level of educational attainment, was also collected where respondents elected to share it.

Survey Demographics



We used these demographic criteria during our analysis to explore the extent to which relationships might exist between parents' decisions and various population segments. Ultimately, we determined to focus our findings – and segmentations – on the variance driven by income level and locale as this is where the most statistically significant differences emerged.

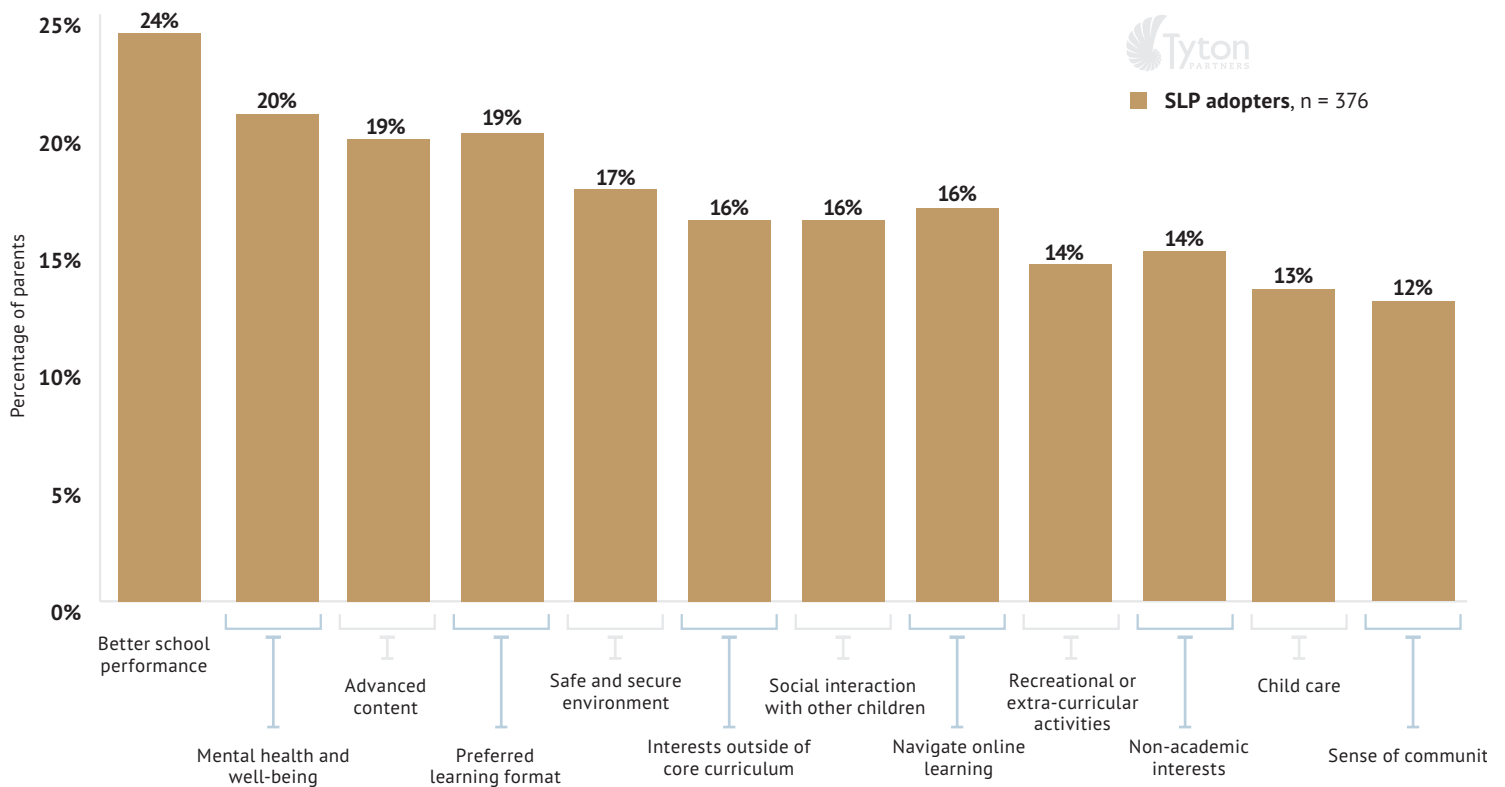
Cluster analysis

In order to test for and identify distinct groups among supplemental learning pod adopters and non-adopters, we conducted a cluster analysis. Cluster analysis is a multivariate method that aims to identify homogenous groups of respondents where the grouping has not been previously identified.

Analysis results in a grouping of respondents in such a way that respondents in the same group – called a “cluster” and referred to in this publication as a “segment” – are more similar to each other than those in other groups as determined by parameters gathered in the survey.

After conducting the analysis on both the SLP adopter and non-adopter respondent samples, we identified distinct segments – represented in the tables below – that are predominantly statistically different from one another in key categories. Pairwise comparisons for proportions and means was used to determine if the clusters were statistically significant in their differences.

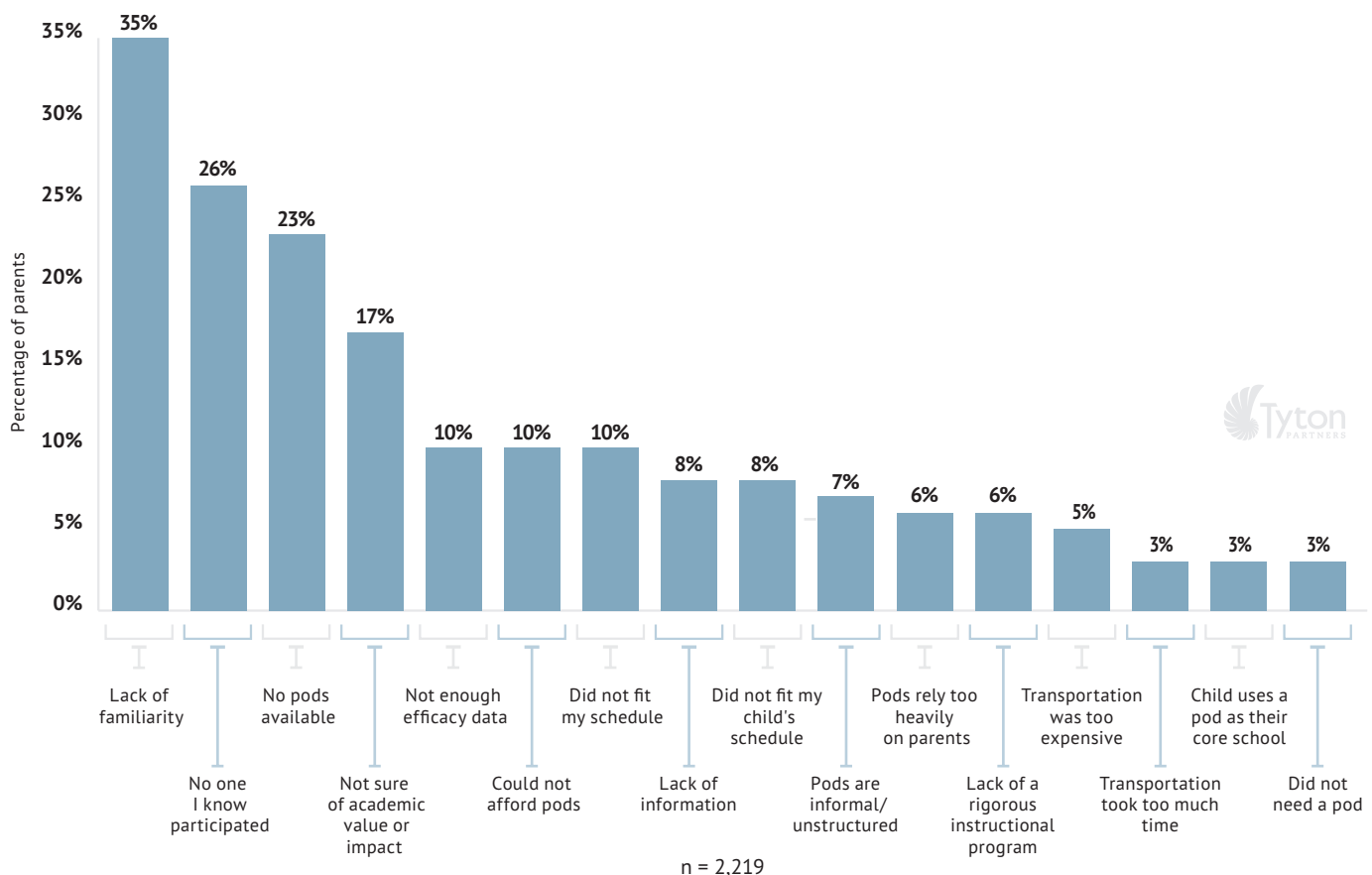
SLP adopter cluster analysis: Objectives parents sought in pursuing supplemental learning pods, spring 2021



Attributes of SLP adopters based on cluster analysis

	ACADEMIC SUPPORT n = 164	ACADEMIC ENRICHMENT n = 121	SOCIAL-EMOTIONAL LEARNING n = 91	NON-ADOPTERS
	Parents who adopted supplemental learning pods and were primarily seeking academic support for their children	Parent's who adopted supplemental learning pods and were primarily seeking academic enrichment for their children	Parent's who adopted supplemental learning pods and were primarily seeking social-emotional learning for their children	Parents whose children did not participate in supplemental learning pods
Child school	Public (48%), Private (21%)	Public (38%), Private (31%)	Public (21%), Private (60%)	Public 71%
Locale	Urban 68%, Suburban 22%, Rural 10%	Urban 73%, Suburban 25%, Rural 2%	Urban 81%, Suburban 15%, Rural 3%	Urban 25%
% of parents with a bachelor's degree or above	53%	68%	66%	45%
Weighted average income	\$140,000	\$189,000	\$172,000	\$78,000
Supplemental learning pod location	School (49%)	Home (52%)	School (58%)	N/A
Supplemental learning pod facilitator	Certified teacher (71%)	Certified teacher (60%)	Certified teacher (66%)	N/A
Supplemental learning pod administrator	School (32%)	Self or family (20%), school (20%), enrichment provider (20%)	Enrichment provider (20%), LP provider (20%)	N/A

Non-adopter cluster analysis: Reasons why parents did not participate in SLPs, spring 2021



Attributes of non-adopters based on cluster analysis

	AWARENESS n = 942	AFFORDABILITY AND AVAILABILITY n = 488	TRUST AND LOGISTICS n = 411
	Parents who did not adopt primarily because they were not aware of SLPs or did not know others who participated.	Parents who did not adopt primarily because they could not afford a SLP or there were none available in their area.	Parents who did not adopt primarily because they had concerns about SLP quality or efficacy and/or could not access one easily.
Child's school	Public (74%) / Private (8%)	Public (73%) / Private (5%)	Public (65%) / Private (14%)
Locale	Suburban (52%) / Rural (26%) / Urban (22%)	Suburban (42%) / Rural (31%) / Urban (27%)	Suburban (52%) / Urban (33%) / Rural (15%)
% of parents with a bachelor's degree or above	45%	41%	51%
Weighted average income	\$80,000	\$73,000	\$99,000
Likelihood to use SLP next year (2021-22 AY) (1 = low, 5 = high)	1.86	2.67	2.51
Likelihood to use SLP in the future (2022-23 AY & beyond)(1 = low, 5 = high)	1.92	2.75	2.63

Conjoint analysis

Choice-based conjoint (CBC) was used as an additional tool to quantify parents' aspirational demand for supplemental learning pods in the future. CBC studies are used to learn about respondents' preferences for the combinations of features that comprise products or services. This approach helps determine which features are perceived to have the most utility for potential customers, and which ones they are willing to "trade off". The technique presents people with realistic and different combinations of distinguishable features – in this case, various program and learning model ones for their child – and then asks them to select the one they would prefer. By repeating this exercise multiple times (i.e., evaluating and selecting between various combinations of features), statistical tools can be used to analyze the relative desire for – or against – one feature relative to another.

Feature levels used to conduct the conjoint analysis

FEATURE	FEATURE LEVELS	FEATURE	FEATURE LEVELS
Cost per month	<ul style="list-style-type: none"> Free \$1-\$250 monthly \$251-\$500 monthly \$501-\$1,000 monthly \$1,001+ monthly 	Program owner/ operator	<ul style="list-style-type: none"> Public K-12 school Private K-12 school Local community organization (e.g., YMCA, Boys and Girls Club) Company Parent(s) Faith-based organization (e.g., church, temple, mosque)

Program size	<ul style="list-style-type: none"> • 1 child per adult • 2-3 children per adult • 4-6 children per adult • 7-9 children per adult • 10+ children per adult 	Program facilitator	<ul style="list-style-type: none"> • Teacher or licensed educator • Tutor/ non-licensed learning professional • Community volunteer(s) • Social worker • Parent(s) • Caregiver or babysitter
Location	<ul style="list-style-type: none"> • School • Library • Recreation or community center • At someone's home I know • Faith center (e.g., church, temple, mosque) 	Benefit to parent	<ul style="list-style-type: none"> • Learning approach that is well-suited to my child's needs • Better understanding of my child's learning needs and challenges • Good social environment for my child • Supervision and care for my child outside of school hours • Influence over what my child is learning and exploring
Primary benefit to child	<ul style="list-style-type: none"> • Advanced academic topics beyond those taught at their school • Support with school-work • Support with college and career exploration • Exploring personal interests and activities • Focus on social-emotional health and skills • Social interaction with other children 	Intensity	<ul style="list-style-type: none"> • Less than 3 hours • 4-5 hours • 6-10 hours • 11-15 hours • 16-20 hours • More than 20 hours

Additional notes

In the graphics on pages 10 and 12, not all the answer options presented to survey participants are included. The graphics display the answers that were selected most frequently by respondents; they do not display those that respondents selected the least. Omitted answer options for the questions represented in those graphics are included in the table below.

Answer choices not shown in figures

Question

Why did you ultimately decide to not unenroll your child from his/her core school to use a learning pod full-time? Please select top three. (For those who considered enrolling their child in a learning pod full time, but ultimately did not)

Why did you not consider unenrolling your child from their core school and using a learning pod full-time? (For those who did not consider enrolling their child in a learning pod full time)

Omitted answer choices due to low selection rate

- Concerns about preparedness for college/ career
- The learning pod teacher or facilitator could not do it full-time
- The other children in the learning pod would not have joined full-time
- Did not want to separate them from their friends
- Could not run the operations of a pod full-time
- It would have been too expensive
- Other
- Don't know

- I was unsure if the learning pod would align with my states' standards for K-12 education
- Could not run the operations of a pod full-time
- Thought it would be too much responsibility to run the operations of a learning pod full-time
- Concerns about preparedness for college/ career
- It would have been too expensive
- The other children in the learning pod would not have joined full-time
- Other
- Don't know