

COVID-19



Maguire Associates COVID-19 Survey Research

Fall 2020 Prospective Parents and Students – NEBHE Webinar

April 2020



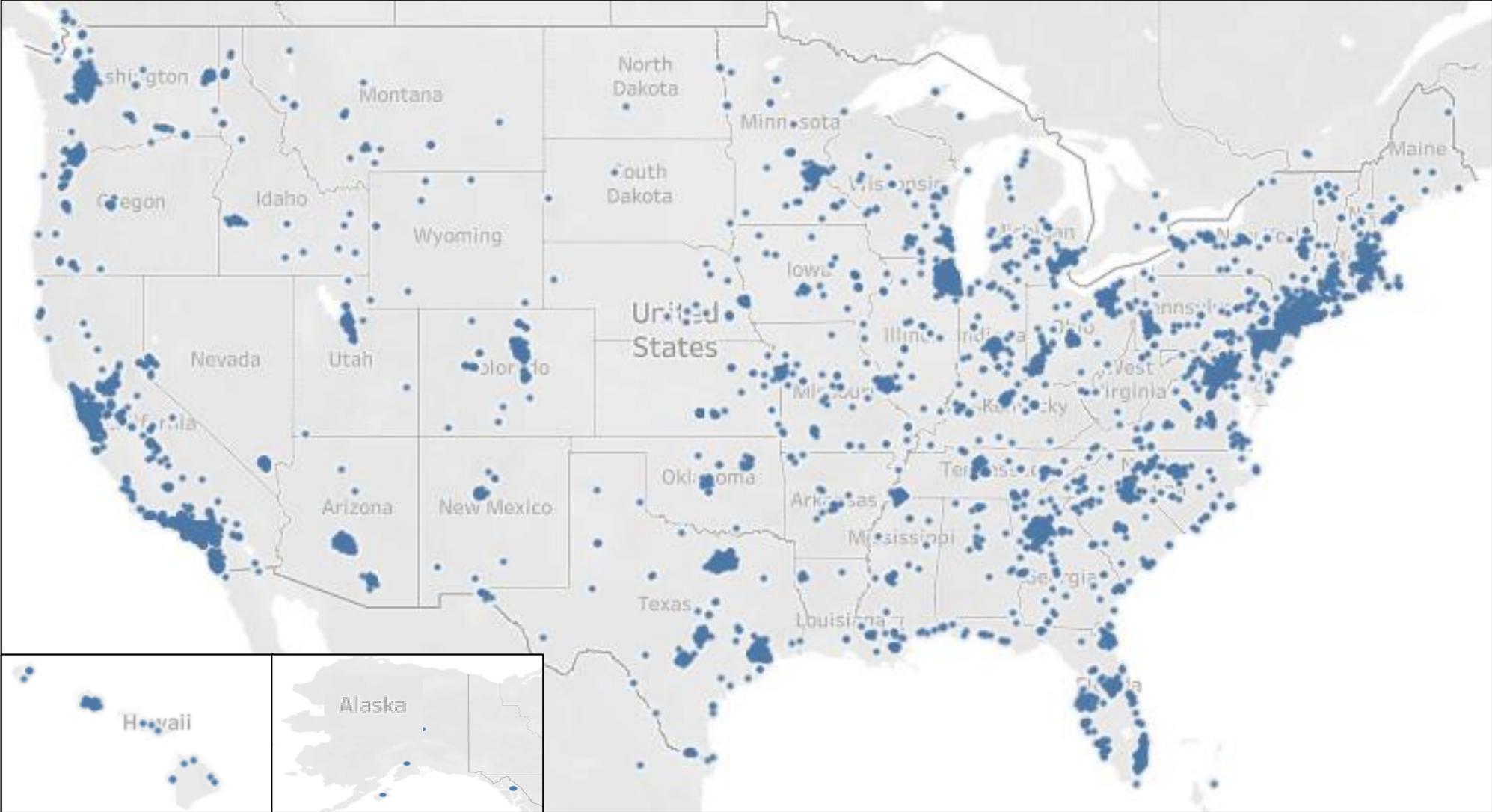
Key Research Questions

- ◆ Have the spread of COVID-19 and response measures impacted the college search and deposit decision process? If so, in what ways? How does the impact vary for students vs. parents, and by key factors like family income?
- ◆ Are there geographic patterns to attitudes and behavior? Do uncertainty and impact vary by state or region? Are students and parents drawn to or away from certain metropolitan areas?
- ◆ What do parents and students want to learn during virtual yield events this Spring? For specific topics, do they prefer livestream or recorded options? How can institutions design proactive and effective communication strategies?

Survey Methodology

- ◆ Maguire Associates engaged partner institutions to collect contact lists for Fall 2020 inquiries and applicants, including both first-year and transfer students and their parents (when available).
- ◆ 470,000 total on contact list; mix of public and private 4-year institutions at all levels of selectivity
- ◆ Survey deployed beginning 3/19/20 and closed on 3/27/20
- ◆ Total completed responses: 6,654; response rate: 1.41%
- ◆ Typical survey completion time: 3 minutes, 55 seconds

Distribution of U.S. Respondents



Note: Based on location of IP address associated with each survey response.

Responses from New England States

- ◆ Massachusetts: 154 respondents
- ◆ Connecticut: 68 respondents
- ◆ New Hampshire: 20 respondents
- ◆ Rhode Island: 19 respondents
- ◆ Maine: 17 Respondents
- ◆ Vermont: 12 Respondents

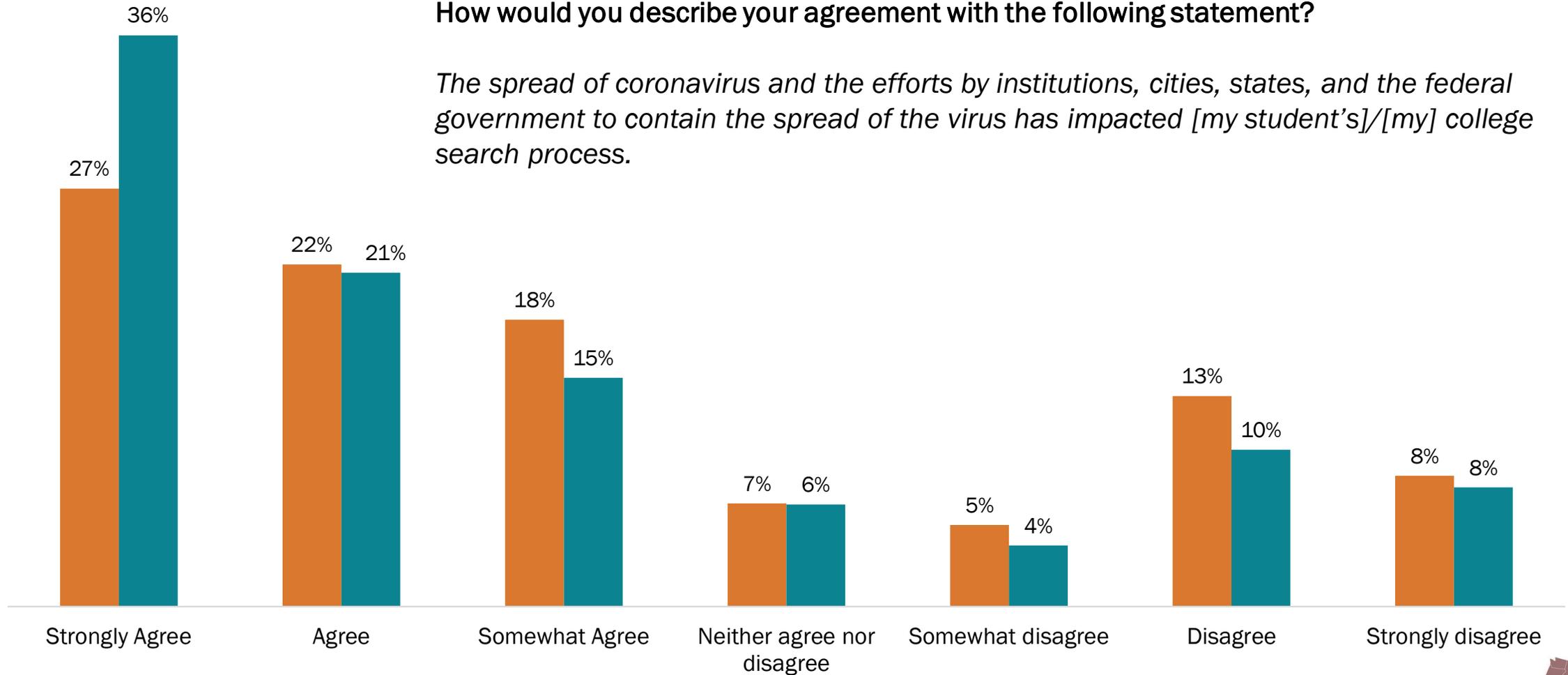
*Note this geolocation data is gathered from embedded IP address data from respondents. It is very likely that there are additional respondents attending high schools within New England that may have returned to their home states or countries prior to this survey.



Parents are more likely than students to report that COVID-19 has impacted the search process.

How would you describe your agreement with the following statement?

The spread of coronavirus and the efforts by institutions, cities, states, and the federal government to contain the spread of the virus has impacted [my student's]/[my] college search process.



Students Parents

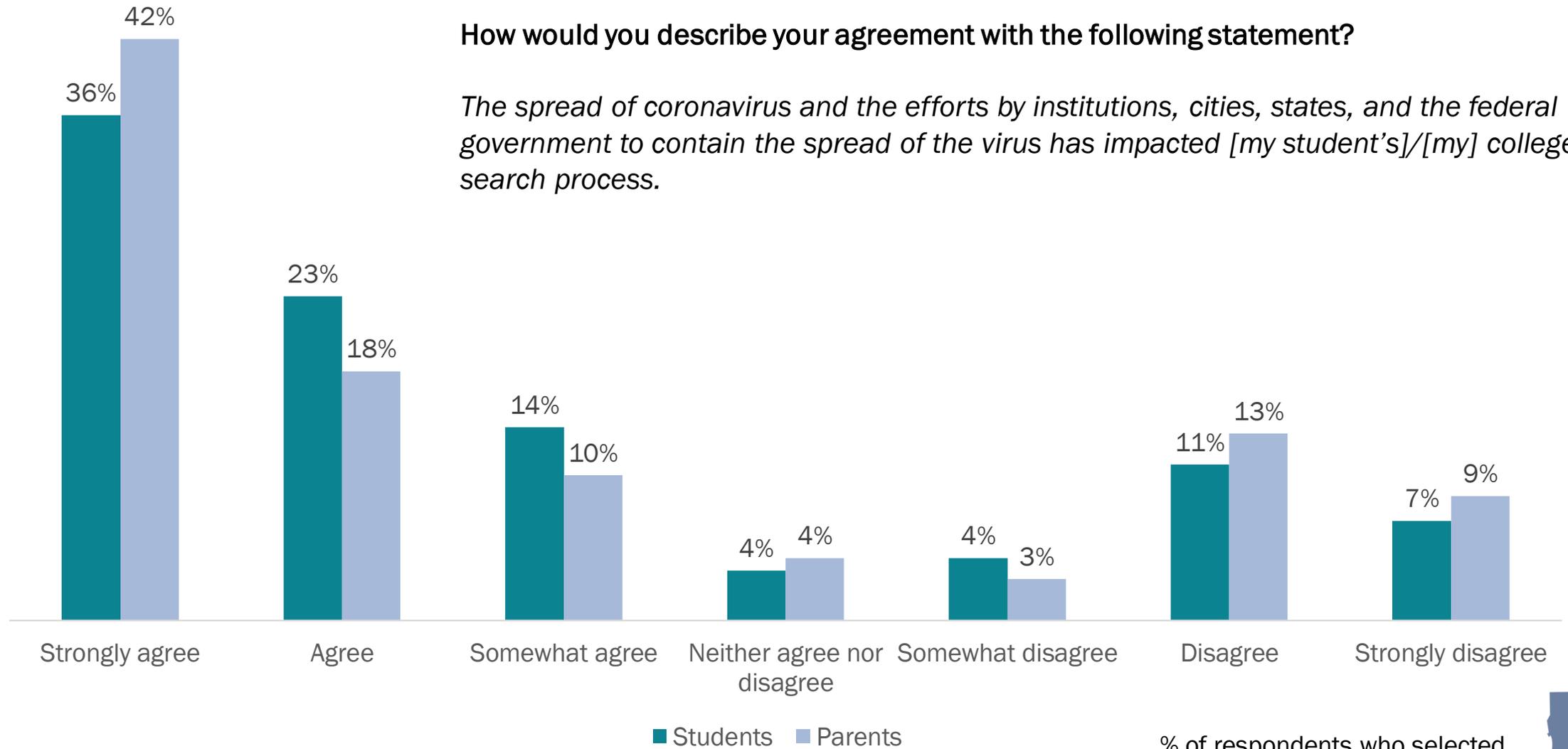
% of respondents who selected this option



Students in New England states, like their parents, feel much more elevated levels of concern.

How would you describe your agreement with the following statement?

The spread of coronavirus and the efforts by institutions, cities, states, and the federal government to contain the spread of the virus has impacted [my student's]/[my] college search process.



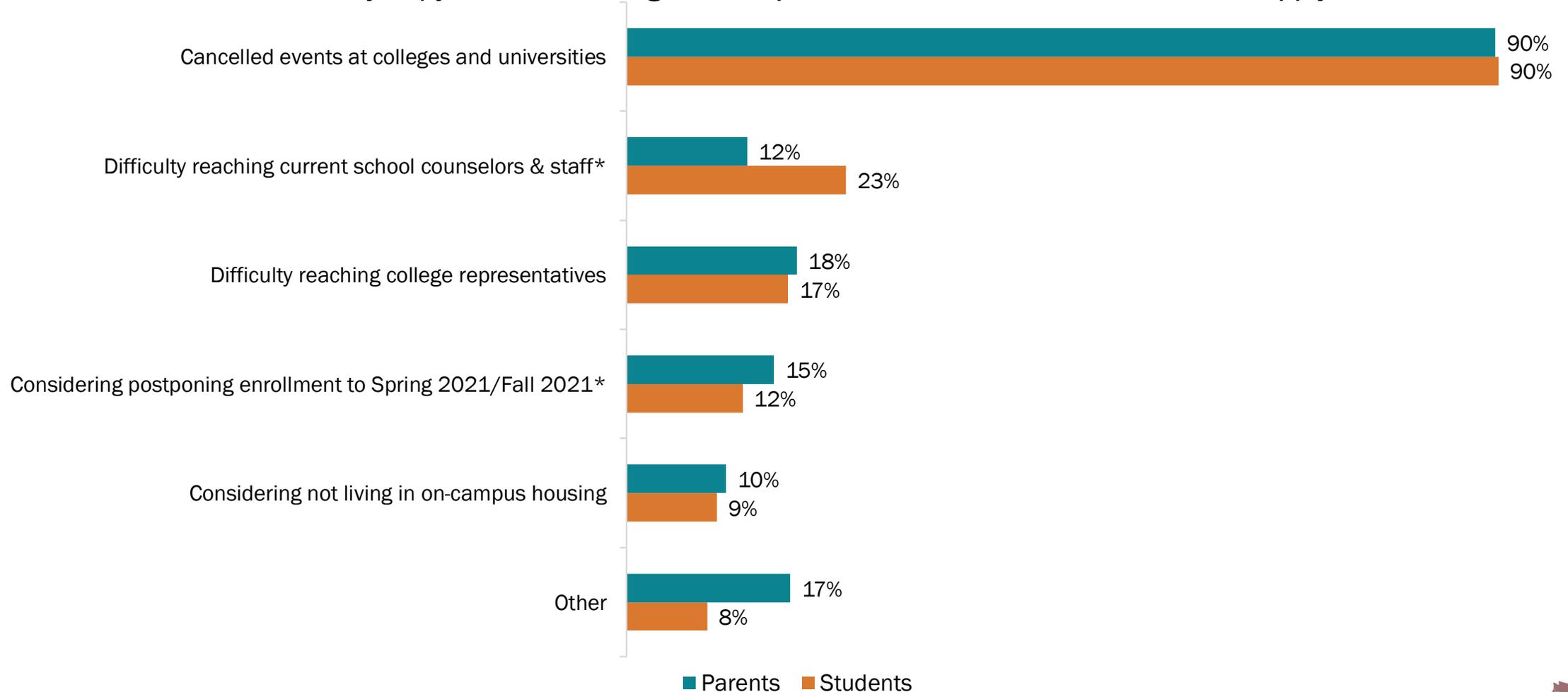
■ Students ■ Parents

% of respondents who selected this option



Cancellation of on-campus events is the most often-cited impact of COVID-19 on the search process.

How has your/your child's college search process been affected? Check all that apply.

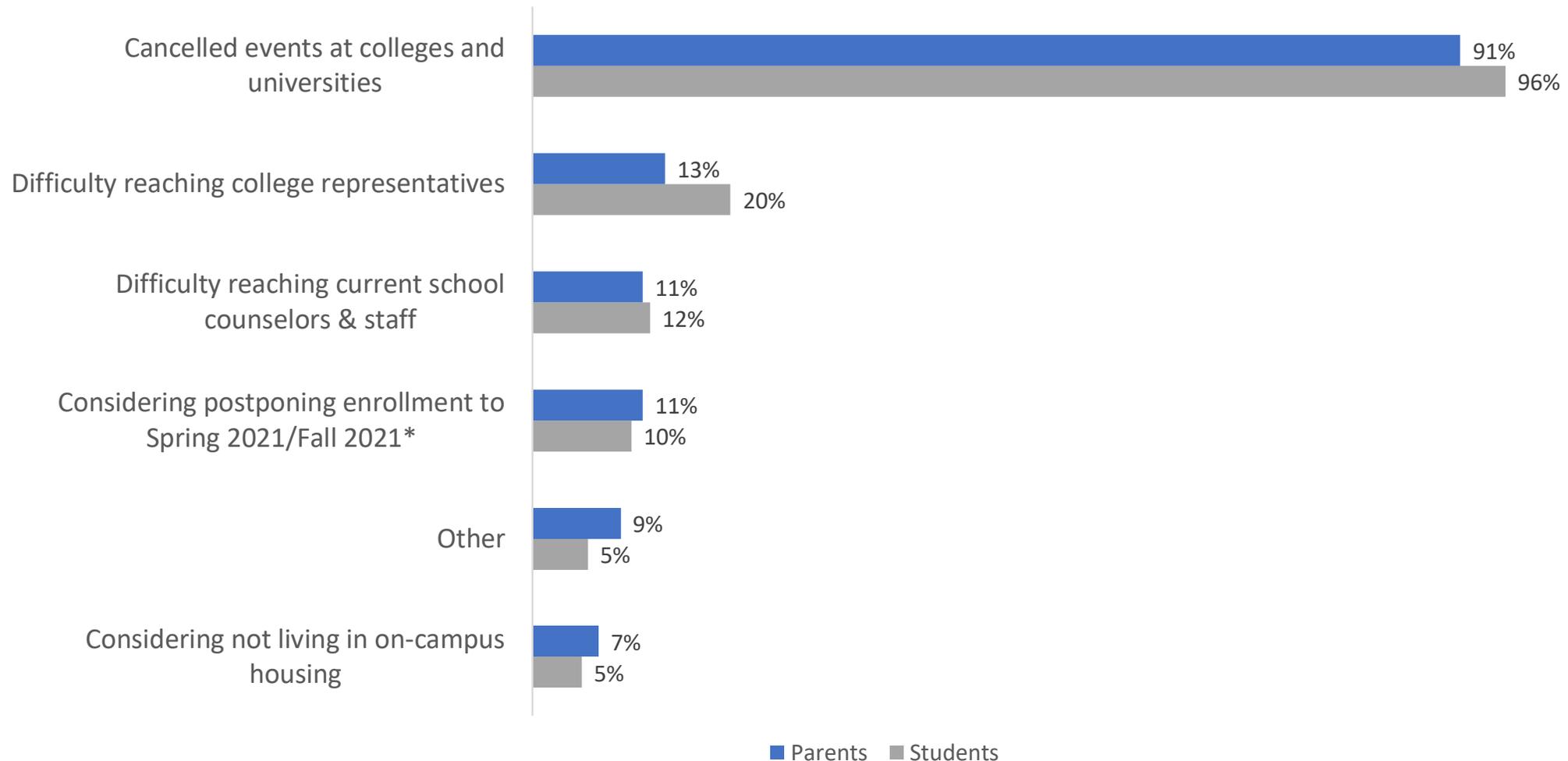


Note: Only asked among respondents who agreed that their (or their student's) search process had been impacted; *Denotes statistically significant difference



Students from New England were less likely to state that they are considering postponing enrollment.

How has your/your child's college search process been affected? Check all that apply



Note: Only asked among respondents who agreed that their (or their student's) search process had been impacted; *Denotes statistically significant difference



Thoughts from Parents...

Concerned about COVID19 and cancellation of classes/contracting virus.

Major uncertainty on all aspects of process.

Wondering about delays in providing financial aid packages, also wondering about the stability of some colleges post-Covid-19.

Onsite interviews for merit scholarships have been moved to a video format.

Thoughts from Students...

Because of the stock market crash I am no longer able to pay for the school I intended on going to in the fall, so I need to find a different school but this is made much more difficult by the fact that all tours and info sessions are canceled.

It is hard for international students to decide whether to go back home in the summer vacation or not, for having the risks to lose the offer or F1 .

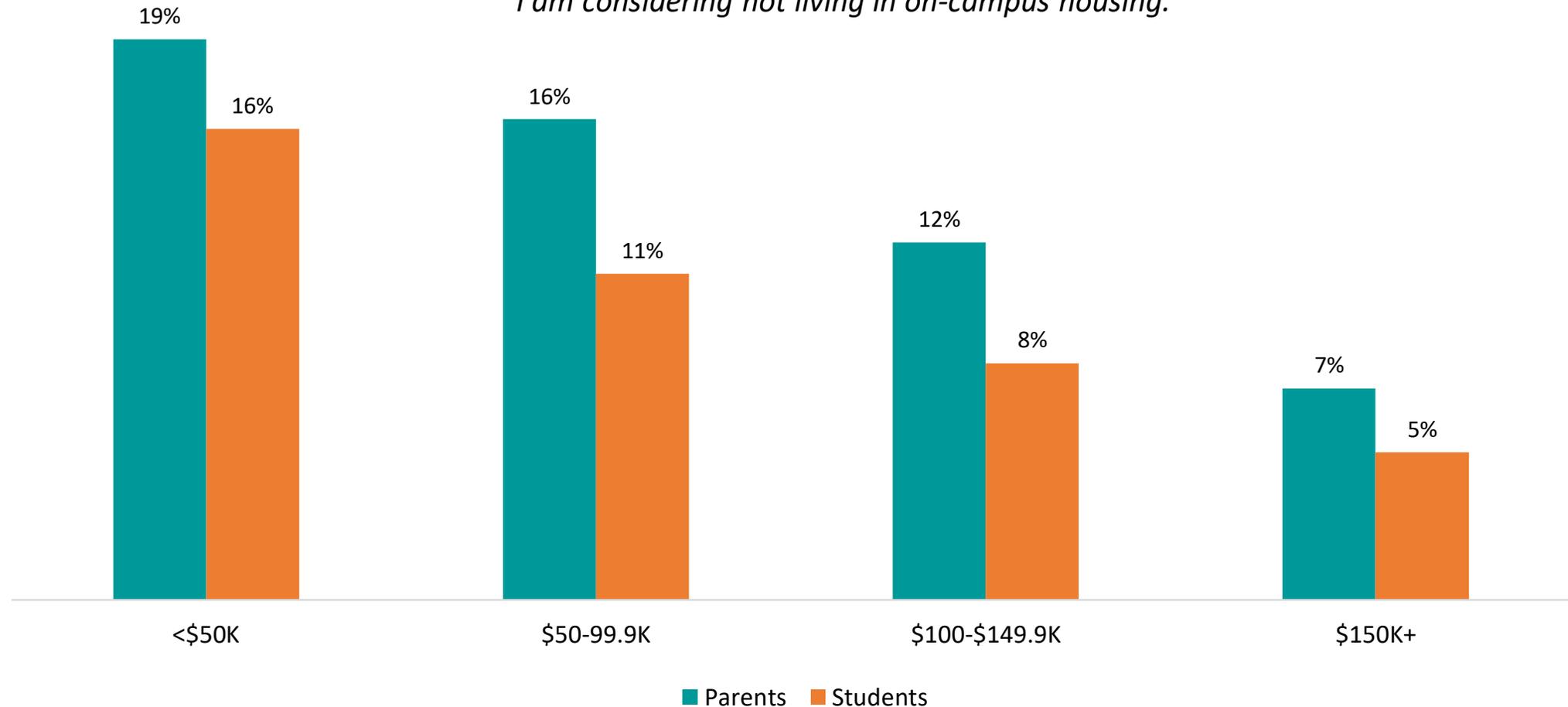
I'm uncertain about the future.

I applied to some colleges I hadn't visited because of the expense. If I got accepted, I planned to visit during my April school break. Now I may have to accept a college by May 1 that I haven't visited.

What does this means for loans as we enter a recession?

Parents and students in lower income bands are more likely to indicate considering not living on campus.

How has your/your child's college search process been affected? Check all that apply.
I am considering not living in on-campus housing.



■ Parents ■ Students

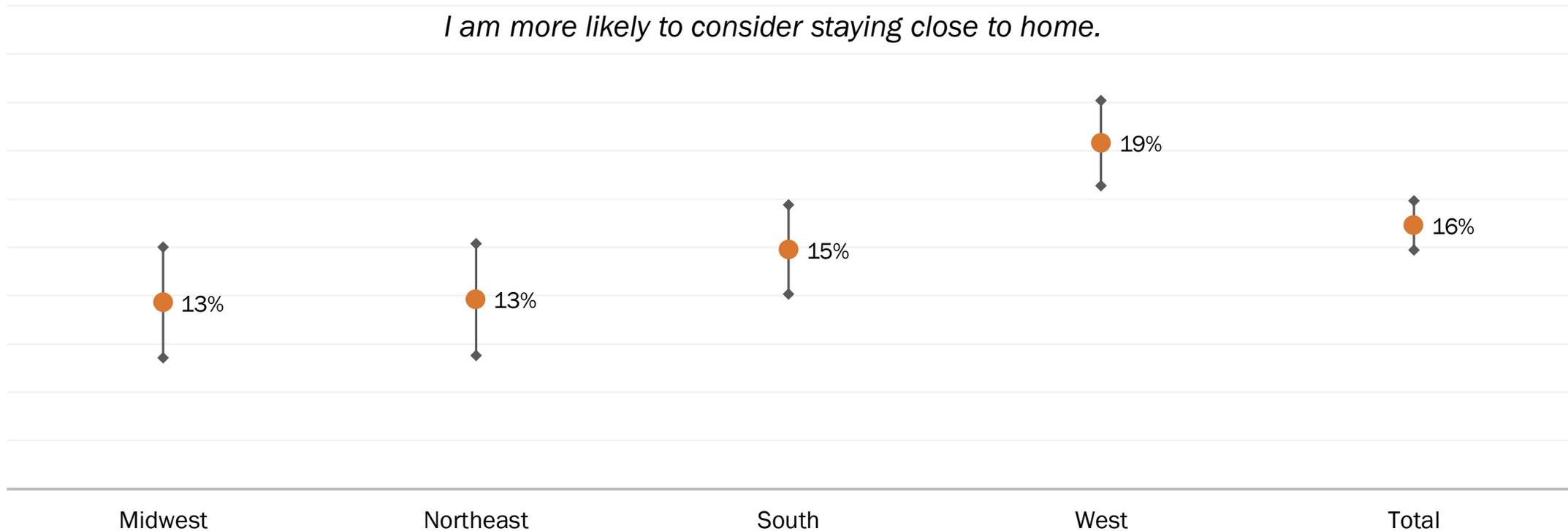
% of respondents who selected this option



Students in the West are more likely to indicate that they're considering staying closer to home.

How has your college search process been affected? Check all that apply.

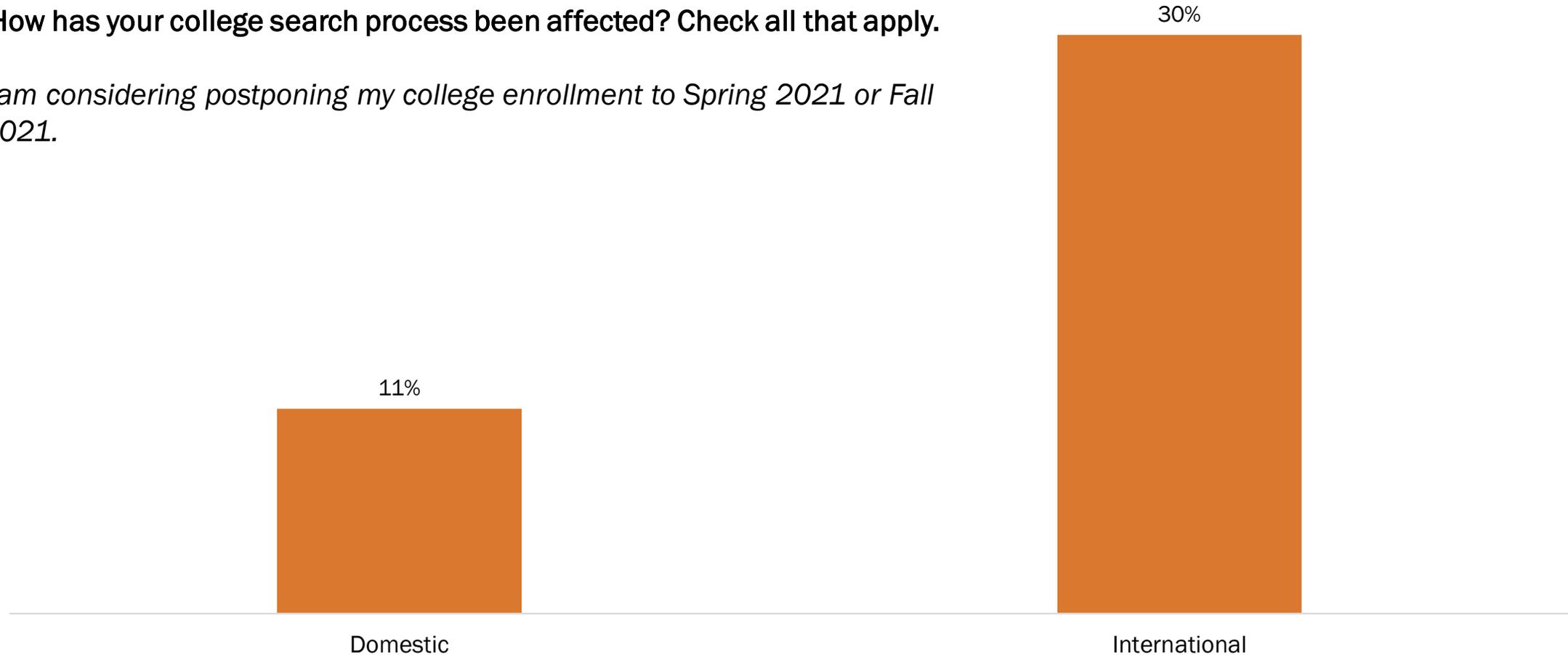
I am more likely to consider staying close to home.



International students are nearly 3x more likely to indicate considering postponing enrollment.*

How has your college search process been affected? Check all that apply.

I am considering postponing my college enrollment to Spring 2021 or Fall 2021.

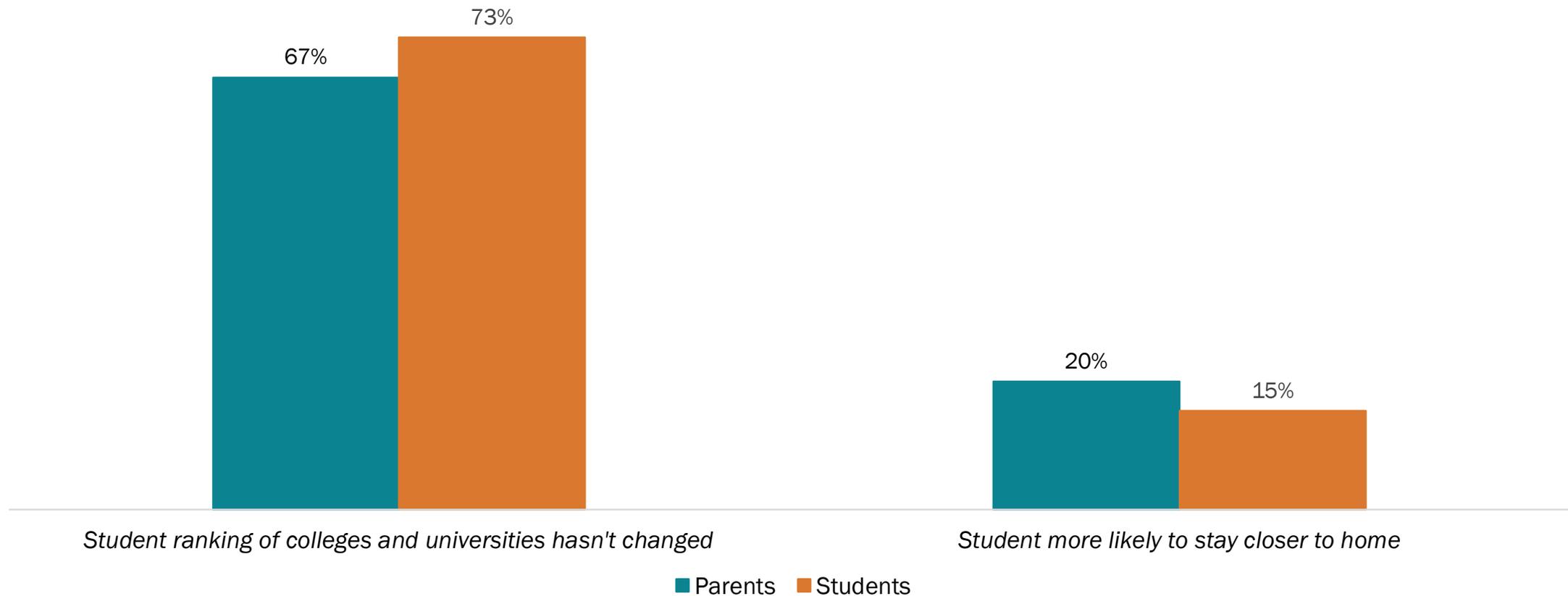


% of students who selected this option;
*Denotes statistically significant difference



Parents are more likely to indicate a change in preferences – especially for staying closer to home.

Has the spread of coronavirus and containment efforts changed your rankings of preferred colleges or universities in any way? Select all that apply.

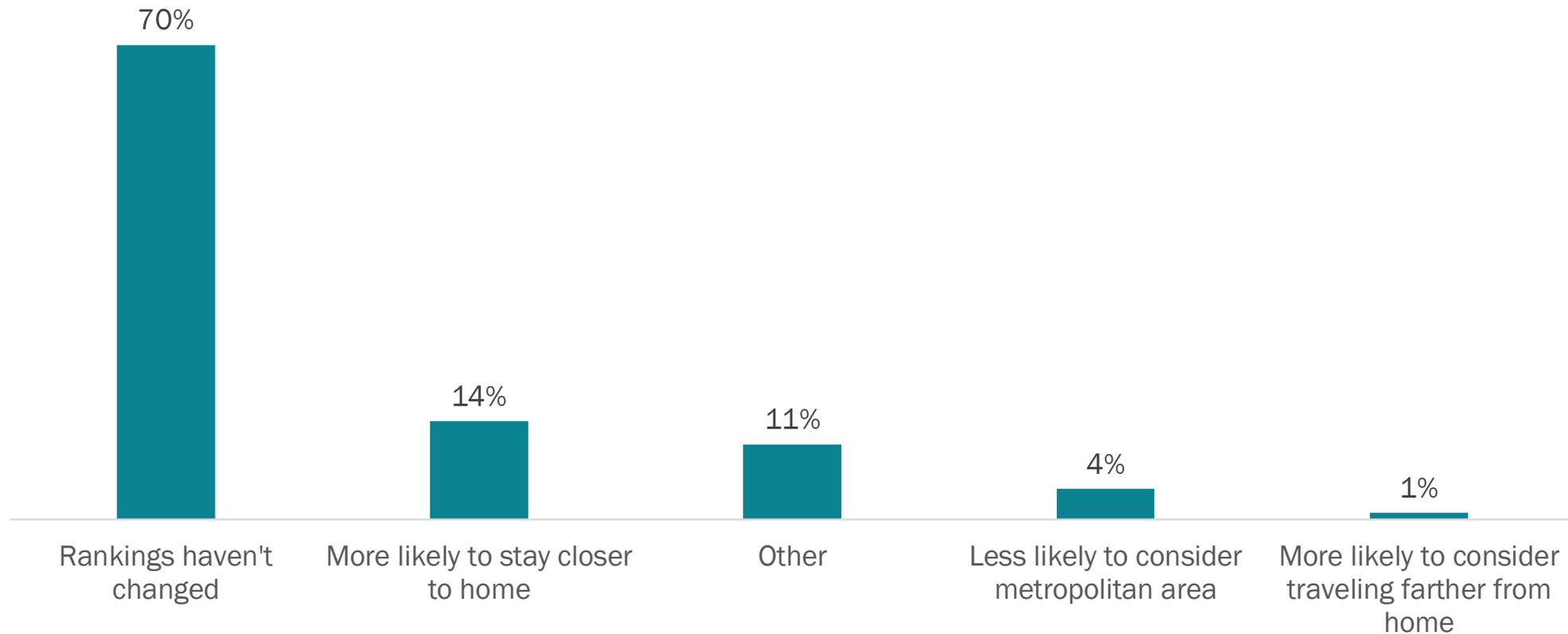


% respondents who selected that option;
All differences displayed are statistically significant.



In New England, rankings haven't changed, but geographic mobility has also been less affected.

Has the spread of coronavirus and containment efforts changed your student's rankings of preferred colleges or universities in any way? Select all that apply.



The qualitative opinions of New England students related to rankings offer unique insights.

“I will have to go more with my “gut instinct” and money because I can’t revisit schools”



“I am now more likely to attend schools I have already visited vs. schools I was unable to go back to due to cancelled events.”

“I am less likely to go to a college I have yet to see even if I get in (I can't see it before going).”

“I am monitoring the way colleges on my list have been responding to the situation (ex: how they are helping students navigate it, stay safe while also reducing financial pressure as much as possible)”

“It has made my decision much harder as I can’t visit prospective schools, and because I can’t reach counselors I am less likely to get scholarships”



“I am more likely to consider price as part of my college selection process”



Students and parents were asked to assess their interest in enrolling at an institution in the Top 20 U.S. metro areas.

Top 20 Markets	
New York City – New Jersey Area	Phoenix Area
Los Angeles Area	San Francisco Bay Area
Chicago Area	Riverside-San Bernardino Area
Dallas - Fort Worth Area	Detroit Area
Houston Area	Seattle-Tacoma Area
Washington, D.C. Area	Minneapolis-St. Paul Area
Miami-Fort Lauderdale Area	San Diego Area
Philadelphia Area	Tampa Bay Area
Atlanta Area	Denver Area
Boston Area	St. Louis Area

- ◆ "Please rate whether you/your student was considering **enrolling** at an institution in that city or region **before the spread of coronavirus.**"
 - ◆ Same question asked **after the spread of coronavirus** for selected markets.
 - ◆ 5-point scale ranged from "Definitely Not" to "Definitely" with a N/A option.
- ◆ Enthusiasm for *all* 20 markets dropped (about 6% fewer selecting "definitely" post-coronavirus), but the drop in some markets was much larger than others



Domestic students have heightened concern with some of the largest markets (NY/NJ, LA, and Boston).



- Drop was less than 4%
- Drop was between 4% and 5.9%
- Drop was between 6% and 7.9%
- Drop was between 8% and 9.9%
- Drop was 10% or more



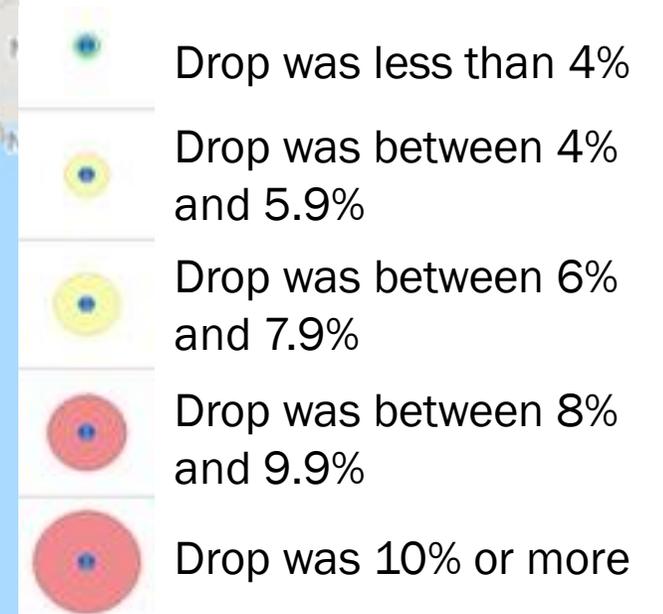
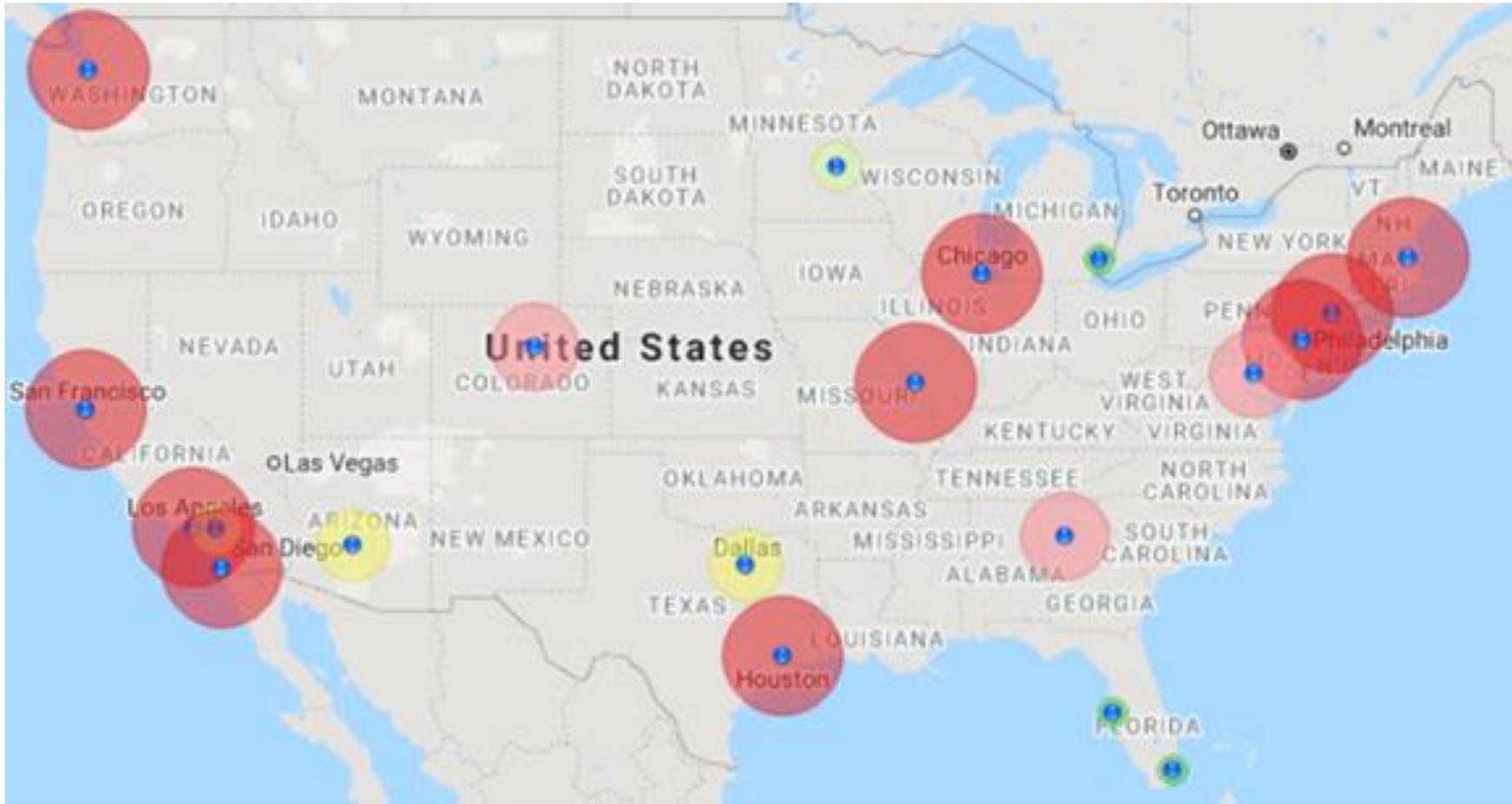
International students express more concern with Seattle, Southern CA, and NY/NJ than domestic students.



- Drop was less than 4%
- Drop was between 4% and 5.9%
- Drop was between 6% and 7.9%
- Drop was between 8% and 9.9%
- Drop was 10% or more



Parent concern is heightened across the board, even in large Midwest markets like St. Louis and Chicago.

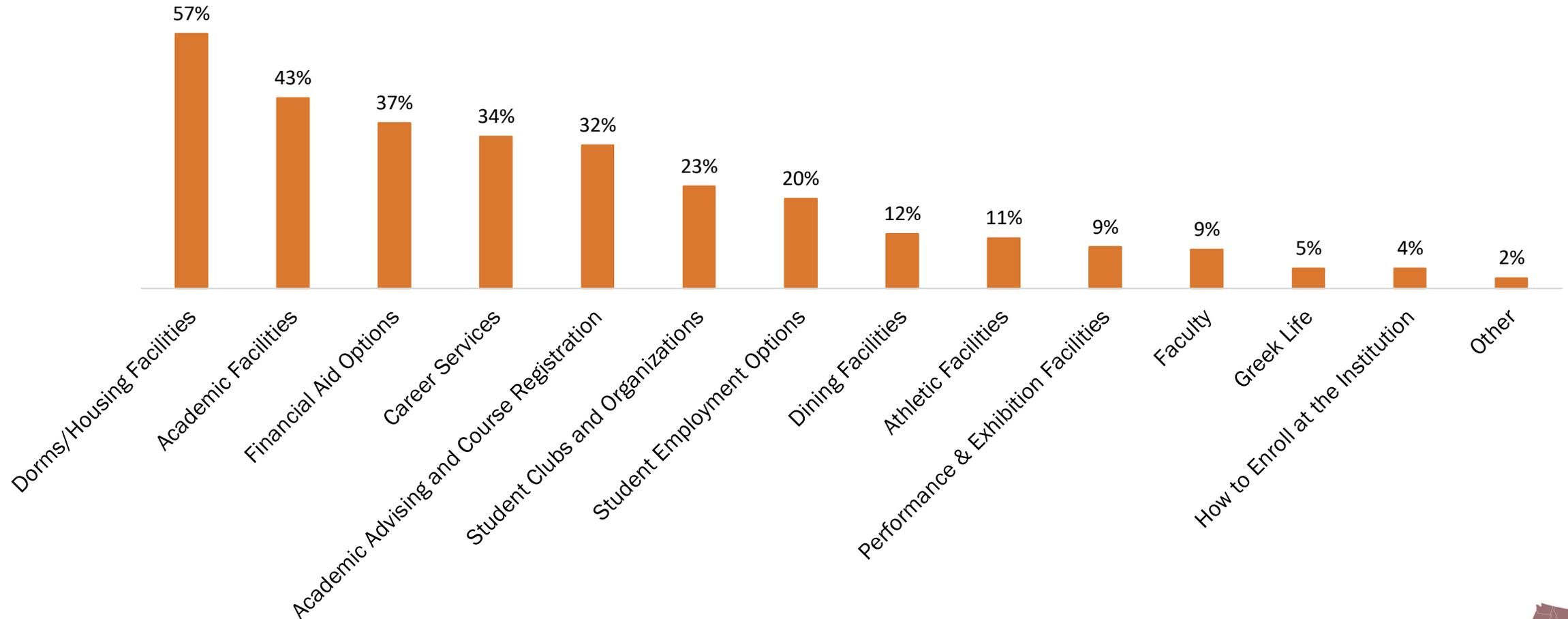


Note: Map shows relative change in **parents** "definitely" considering their student enrolling in these areas



Top 3 Topics of Interest to Students

If you were participating in a virtual campus event during the Spring for a college or university you are considering, what are the three things you would be MOST interested in learning more about?

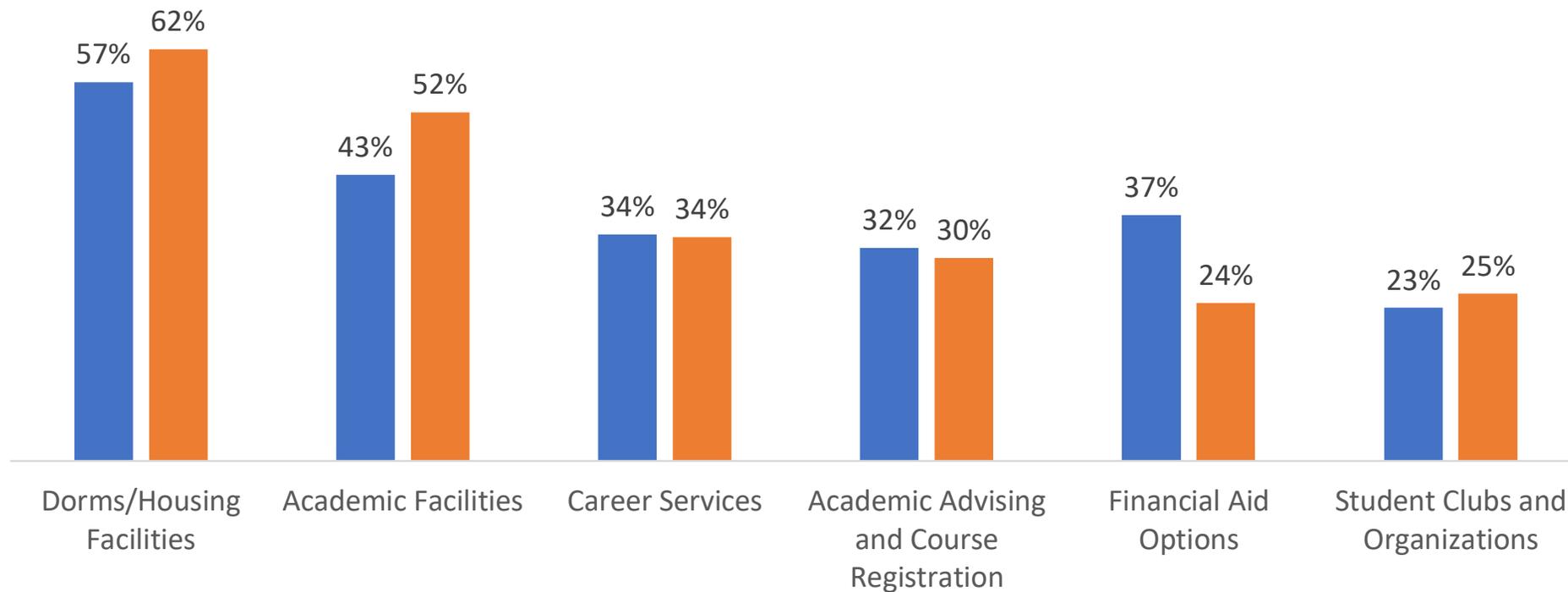


% of students who selected this option



Students in New England are significantly less concerned about financial aid options and more concerned about seeing facilities at colleges of their choice.

Top 6 Selections for New England Students



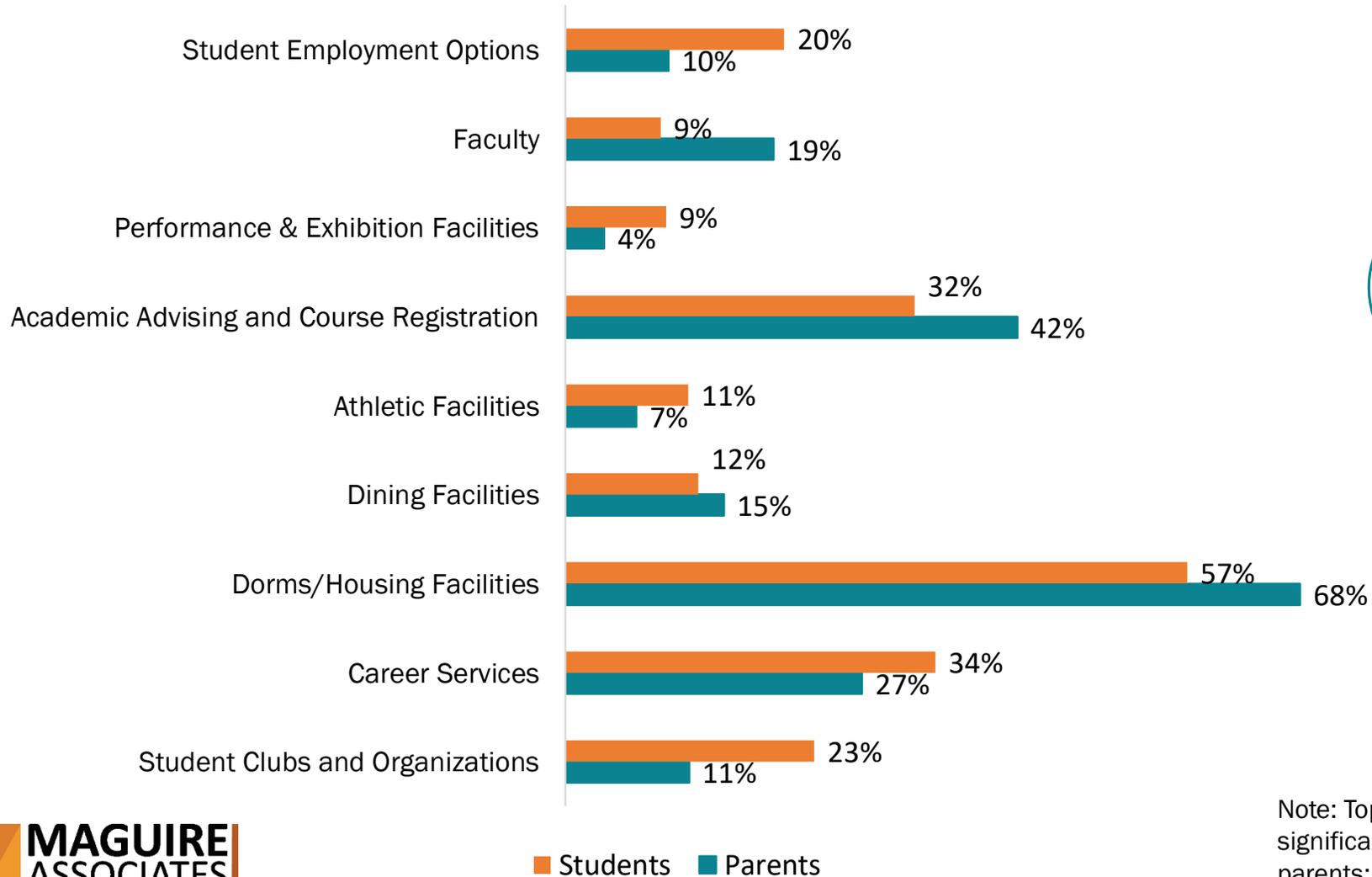
■ NATIONAL ■ NEW ENGLAND

% of students who selected this option



Topics of interest varied between students and parents.

If you were participating in a virtual campus event during the Spring for a college or university you are considering, what are the three things you would be MOST interested in learning more about?

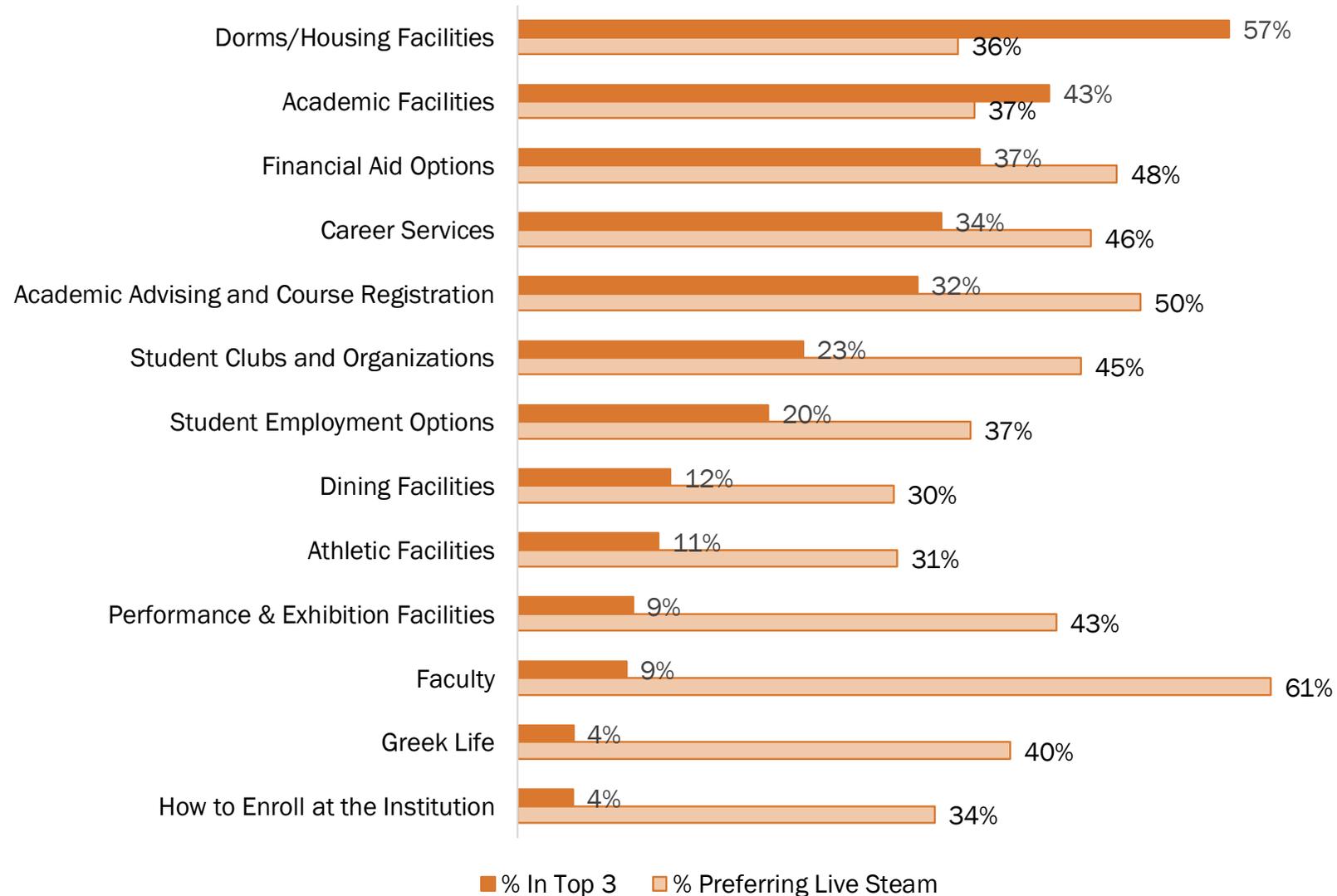


**“Admissions reps are making themselves available, but we don't know exactly what questions to ask.”
- Fall 2020 Parent**

Note: Topics displayed include those with statistically significant differences between students and parents; % who selected this option



Topics and Preferred Delivery Methods Among Students



■ % In Top 3 ■ % Preferring Live Stream



“HAVE CONTINGENCY PLANS BEEN DEVELOPED SHOULD THE CAMPUS NOT BE FULLY OPEN FOR FACE-TO-FACE INSTRUCTION AND CAMPUS ACTIVITY? FOR EXAMPLE, WILL CLASSES BE ONLINE AND, IF SO, WILL STUDENTS BE ASKED TO COMPLETE THEM FROM HOME? WILL FIRST-TIME FRESHMEN BE GIVEN THE OPPORTUNITY TO DEFER THEIR ADMISSION AND SCHOLARSHIPS TO BEGIN FACE-TO-FACE INSTRUCTION AND INTERACTIONS IN SPRING 2021?”

- FALL 2020 PARENT

Contextualizing the Impact (2008-2009 Recession)

Figure 1: Percentage of Four-Year College Students Who Earn a Degree Within Five Years of Entry

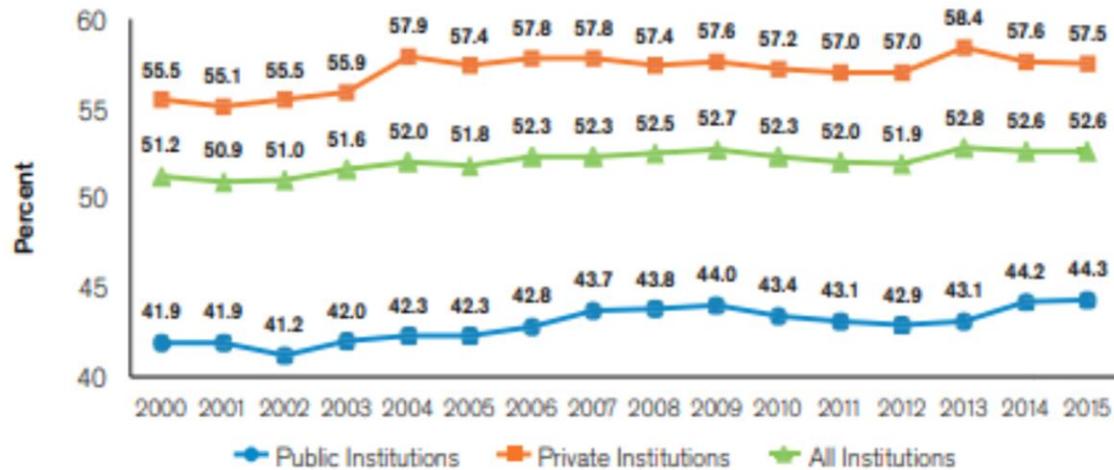
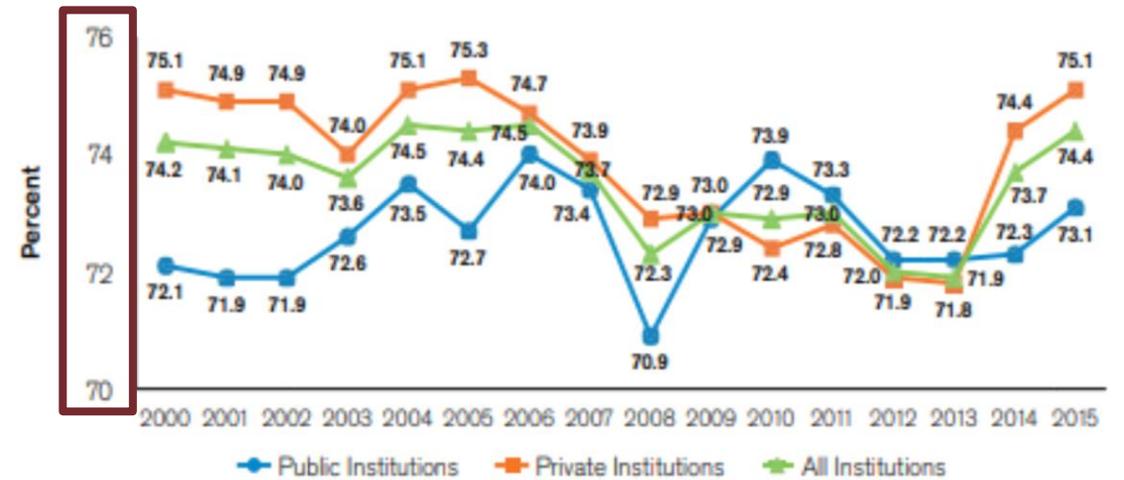


Figure 2: Percentage of First-Year Students at Four-Year Colleges Who Return for Second Year



- ◆ The economic recession of 2008-2009 did result in declines in aggregate and first-year persistence at four-year institutions, but the impact was marginal
- ◆ In fact, first year enrollments at many regional public institutions and in graduate programs grew during this time.

What will happen in Fall?

- ◆ Respondents voiced significant concerns in open-ended text responses. One theme: While students may have the information needed now to choose an institution, what will happen if on-campus instruction cannot begin in the Fall?
- ◆ Institutions are in a difficult position:
 - ◆ Contingency plans must be developed, but tremendous uncertainty remains (and may remain into the summer);
 - ◆ There is a reticence to be transparent about Fall contingency plans out of concerns that this will create additional uncertainty and reluctance to deposit.

Summary of Key Findings

- ◆ Most parents and students somewhat agreed that the spread of COVID-19 and the response have impacted their college search process.
 - ◆ But: majorities of both parents and students indicated that it had not changed their rank order of colleges and universities.
- ◆ The broadest impact of COVID-19 is the inability for parents and students to visit campuses before depositing, but significant portions of students also indicated challenges reaching counselors and other staff at their current school – particularly lower-income students.

Summary of Key Findings (2)

- ◆ When COVID-19 has changed students' rankings of institutions, the change has varied significantly based on geography and income. Particularly in the West, where the density of institutions of higher education is much lower, parents and students both are considering staying closer to home.
- ◆ In open-ended text responses, parents and students both expressed fear and uncertainty about two considerations:
 - ◆ **What will the economic impact of the virus mean for my ability to finance [my]/[my student's] education?**
 - ◆ **Will institutions resume on-campus instruction in the Fall? If not, what accommodations will be made for students?**
- ◆ Even when parents and students are sure of their decision, they're unsure of what postsecondary education will look like in Fall 2020.

Action Items for the Immediate Future

1

Develop and communicate opportunities for students to engage on virtual platforms in creative ways.

2

Organize all digital assets into a centralized location and streamline the enrollment process.

3

Forecast mild, moderate, and severe impact scenarios for enrollment and budget.

Action Items for the Immediate Future

4

Solidify a plan for remote learning in the Fall/invest in online learning infrastructure.

5

Set up cash flow to prepare for additional recruitment investments over the next few months (not weeks).

6

Be prepared to make difficult and unpopular decisions.

DISCUSSION

Additional Items to Consider

1. Welcome applications throughout the summer. Many institutions are relaxing application deadlines, even selective ones, and some families are shifting plans.
2. Increase direct communication with parents. Use the research results to address their questions and concerns.
3. Shore up the appeals budget. A lost enrollment is more expensive than an increased discount rate.
4. Target extra efforts - and responsive service - to lower income and local students to help them through the uncertainties and challenges of the enrollment process.
5. Incentivize faculty to help with personal outreach over the summer to prospective students and their parents.
6. Prepare for competitor recruitment throughout the summer months. Develop a robust melt prevention strategy to prevent “poaching.”
7. In preparation for the possibility of remote learning in the fall, develop a case statement that espouses the benefits of remote learning. Avoid the temptation to subtly apologize for this method of teaching.
8. If a decision is made to reduce the price for online learning, develop a process for balancing the top-line cost and the size of financial aid awards, especially for generous packages. Families expect a net cost reduction, but these reductions must be made strategically.