

COVID-19



Maguire Associates COVID-19 Survey Research

Fall 2020 Prospective Parents and Students

March 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 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

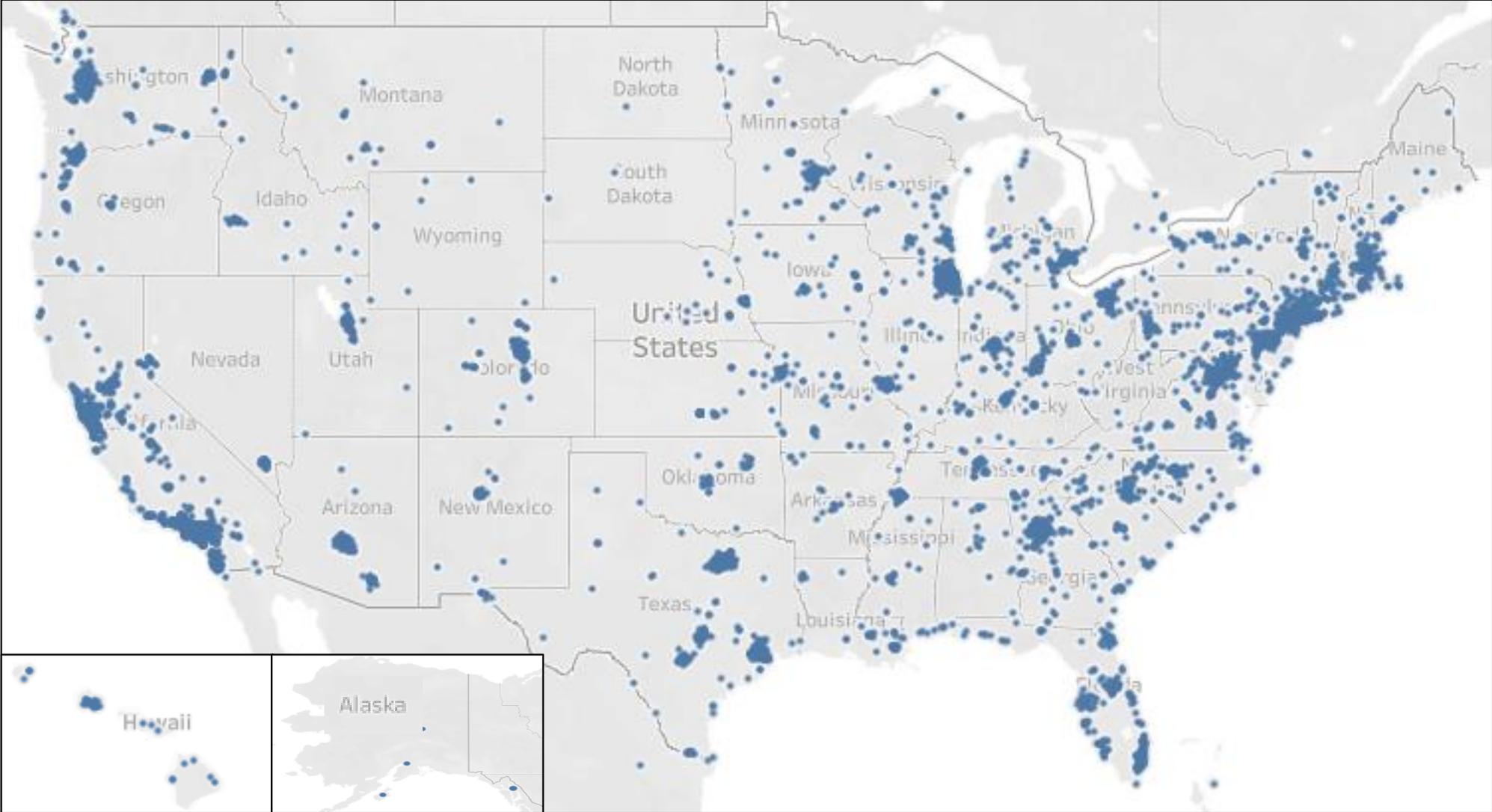
Population Statistics

- ◆ Respondent Type:
 - ◆ HS Senior (79.1%)
 - ◆ Transfer Student (2.4%)
 - ◆ Parent/Guardian of a Student (18.1%)
 - ◆ Other (0.4%)

- ◆ Domestic vs. International*
 - ◆ Domestic Student (74.9%)
 - ◆ Domestic Parent (17.2%)
 - ◆ International Student (6.5%)
 - ◆ International Parent (1.0%)

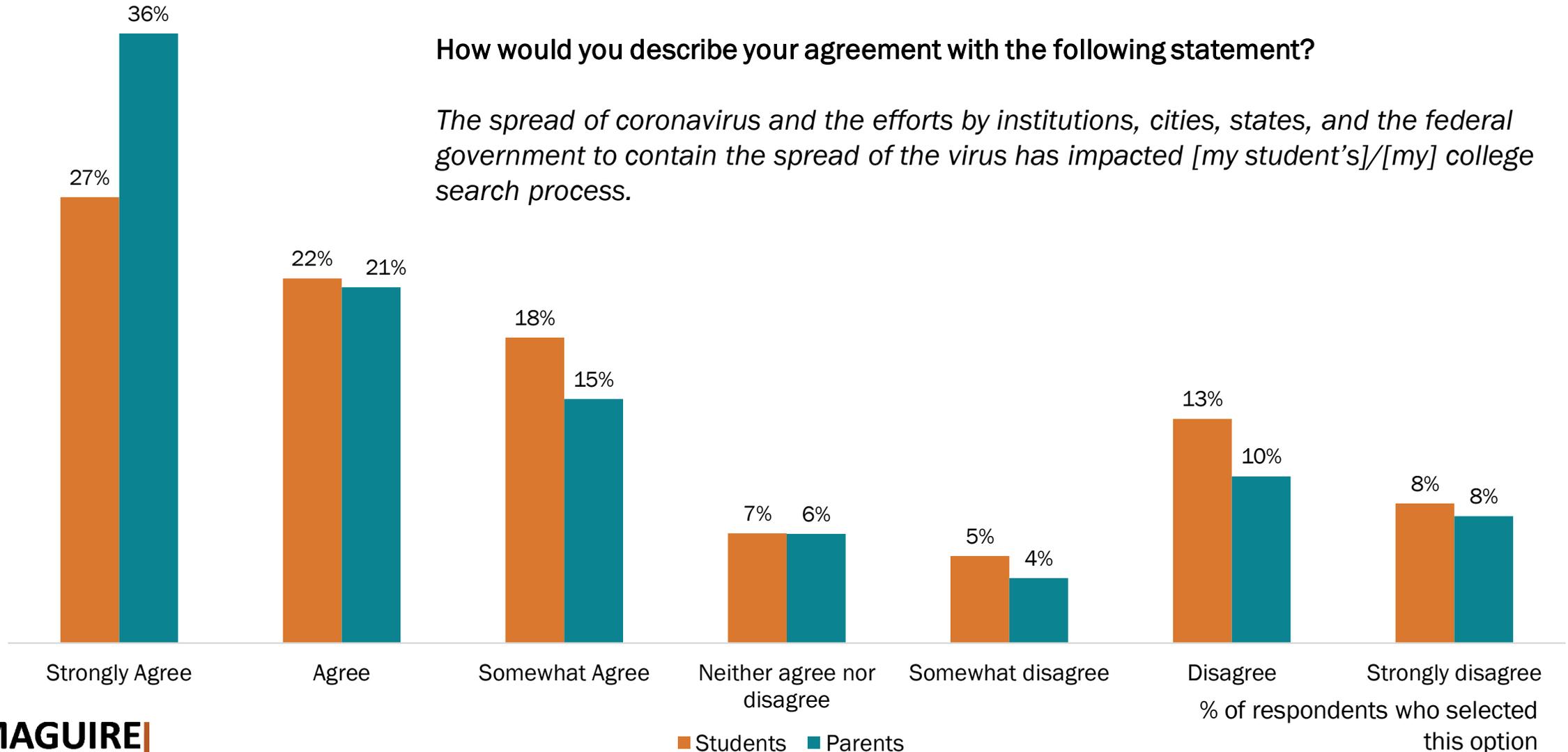
*Survey ended for other population (0.4%) prior to domestic vs. international question. Thus, subtotals do not sum to 100%.

Distribution of U.S. Respondents

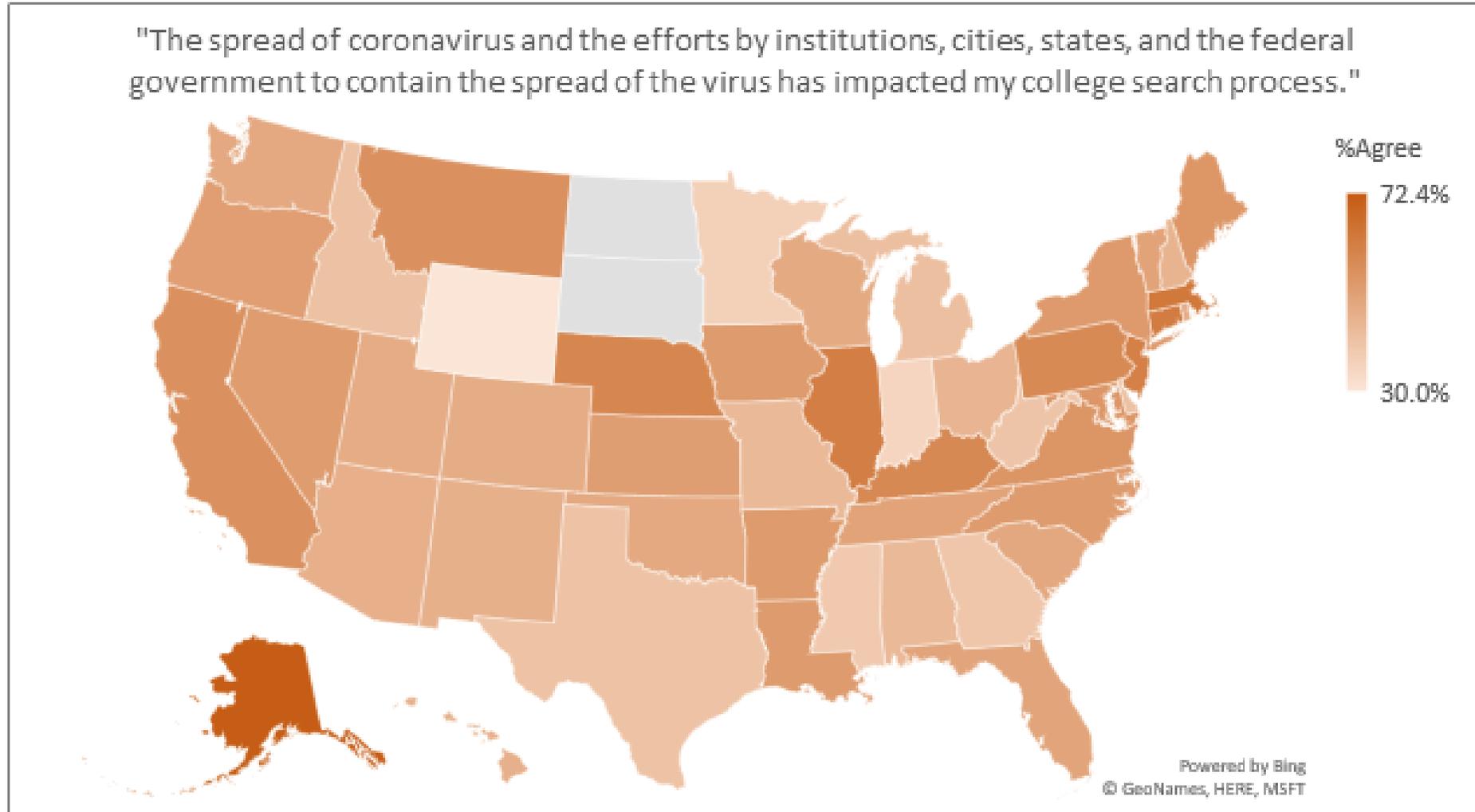


Note: Based on location of IP address associated with each survey response.

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

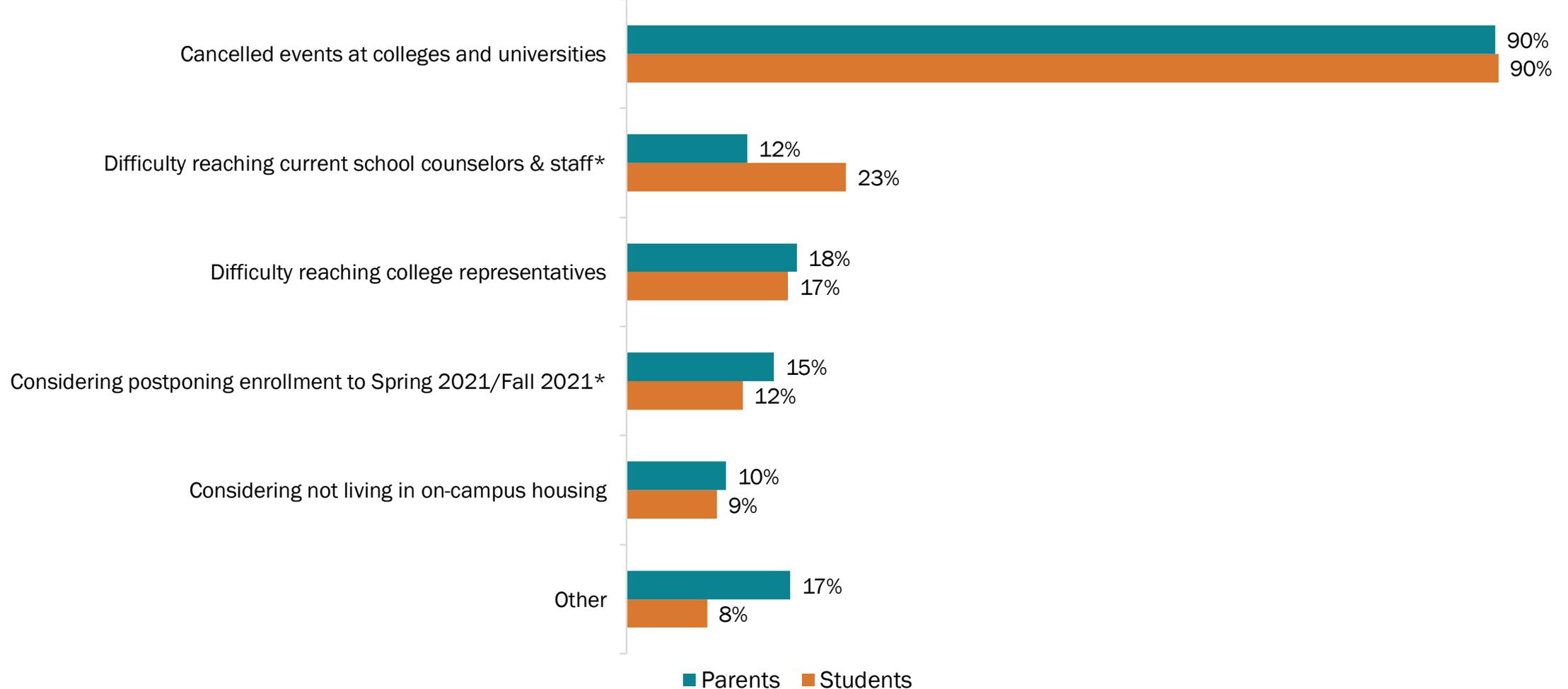


Agreement on whether COVID-19 has impacted the search process varied by state.



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.

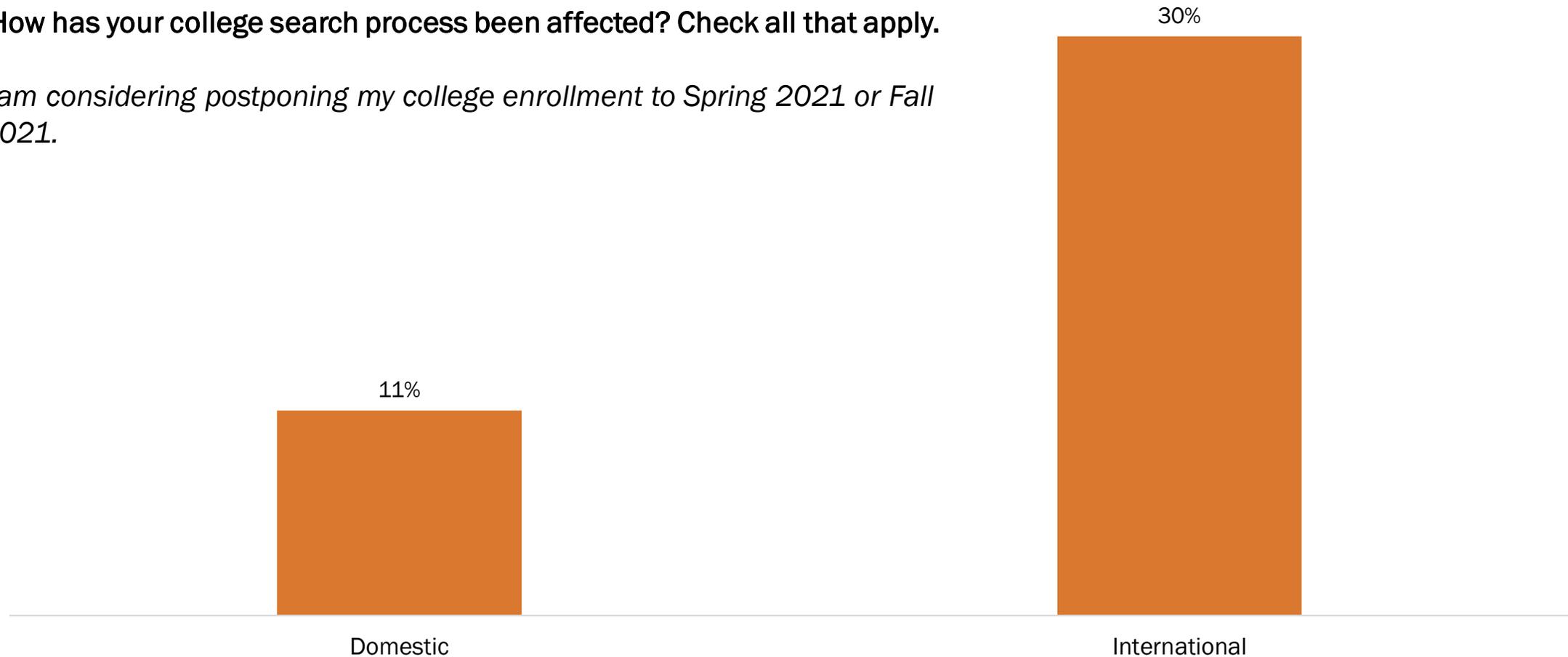


Note: Only asked among respondents who agreed that their (or their student's) search process had been impacted; *Denotes statistically significant difference

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

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

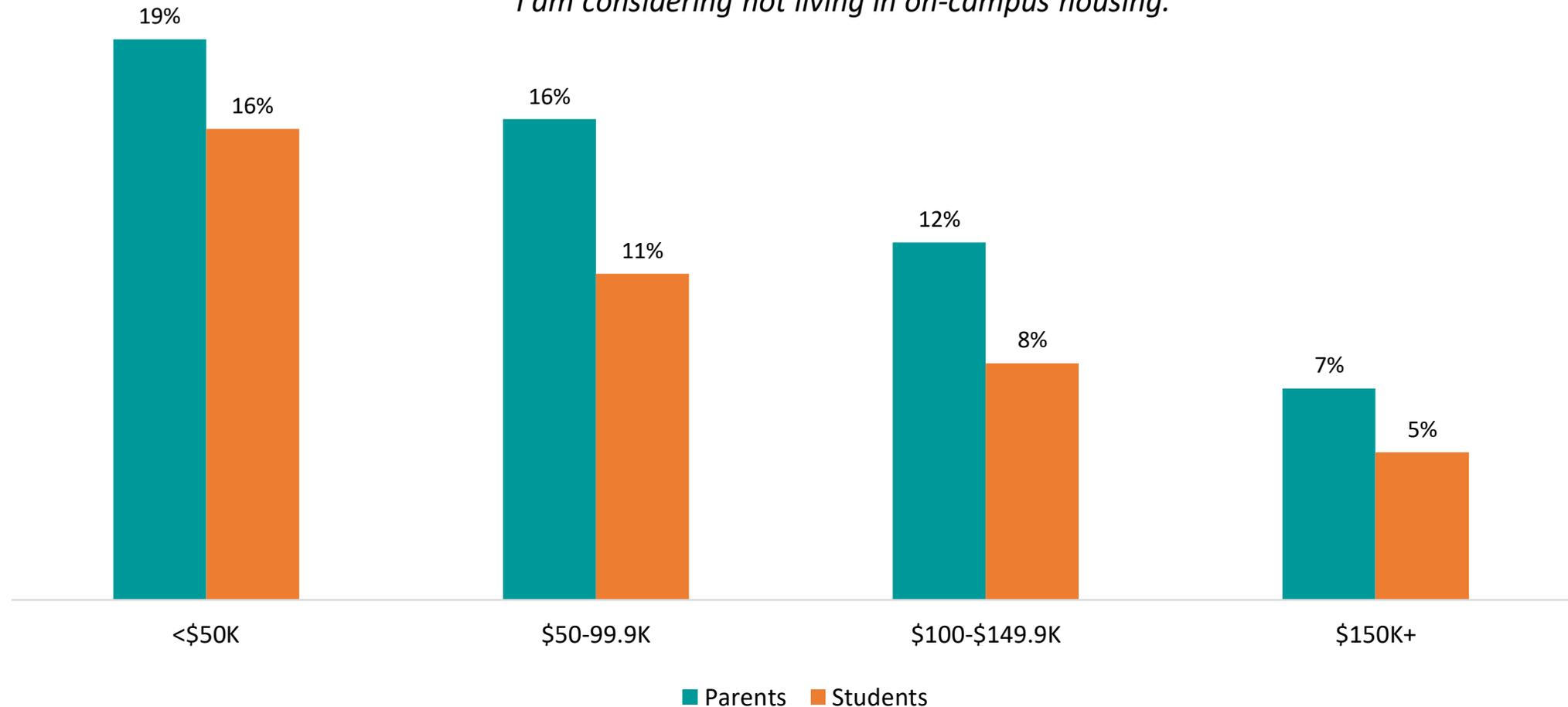
I am considering postponing my college enrollment to Spring 2021 or Fall 2021.



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

Parents 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.

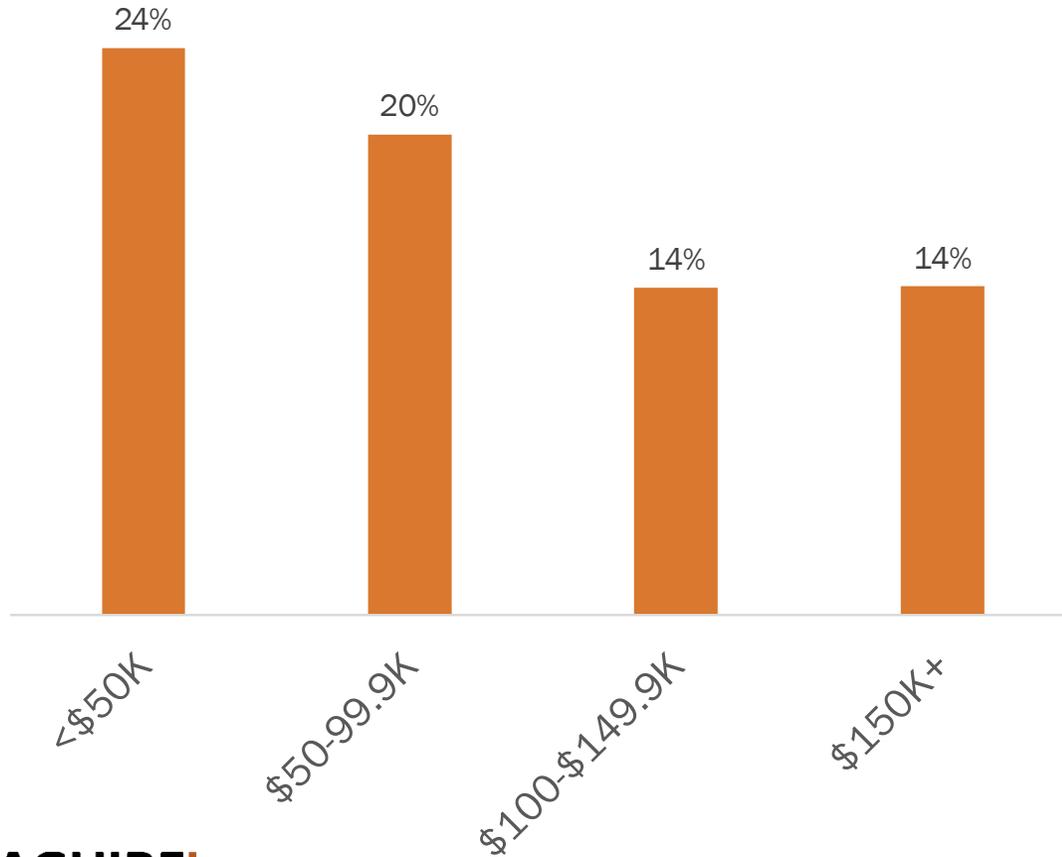


■ Parents ■ Students

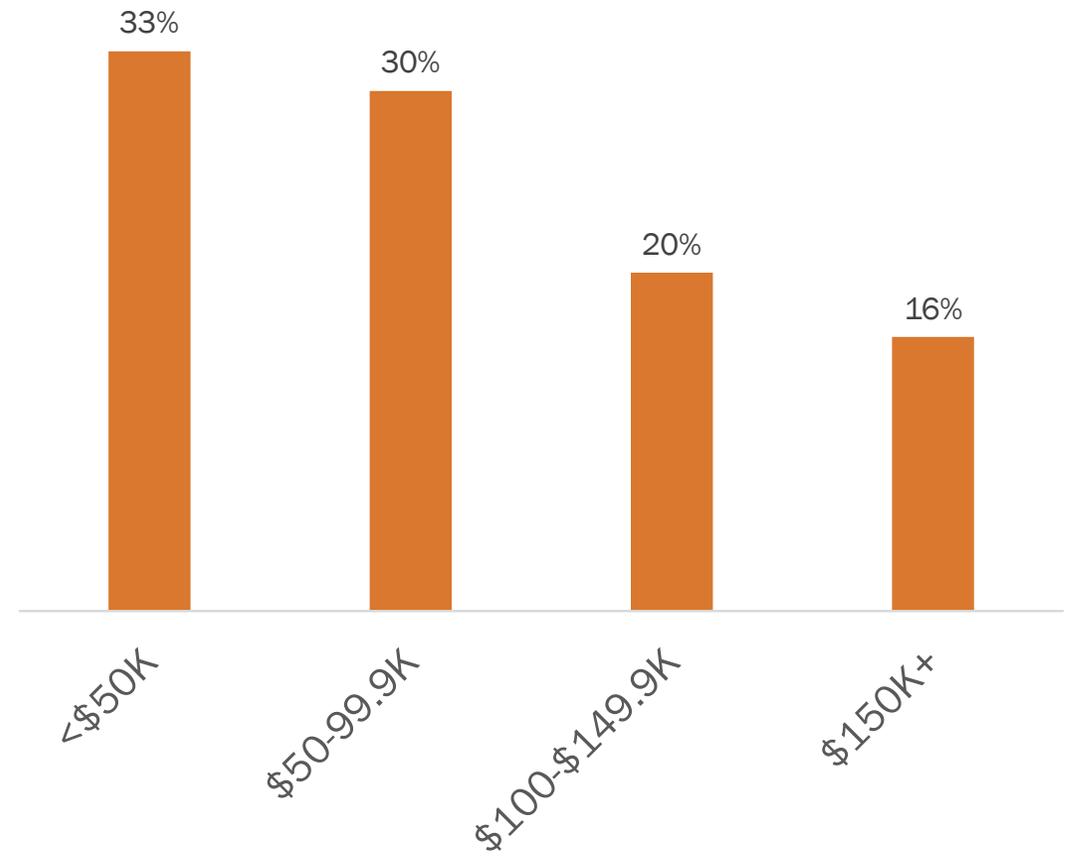
Students report different impacts of school closures based on income.

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

I have had difficulty reaching representatives at colleges or universities to ask questions.



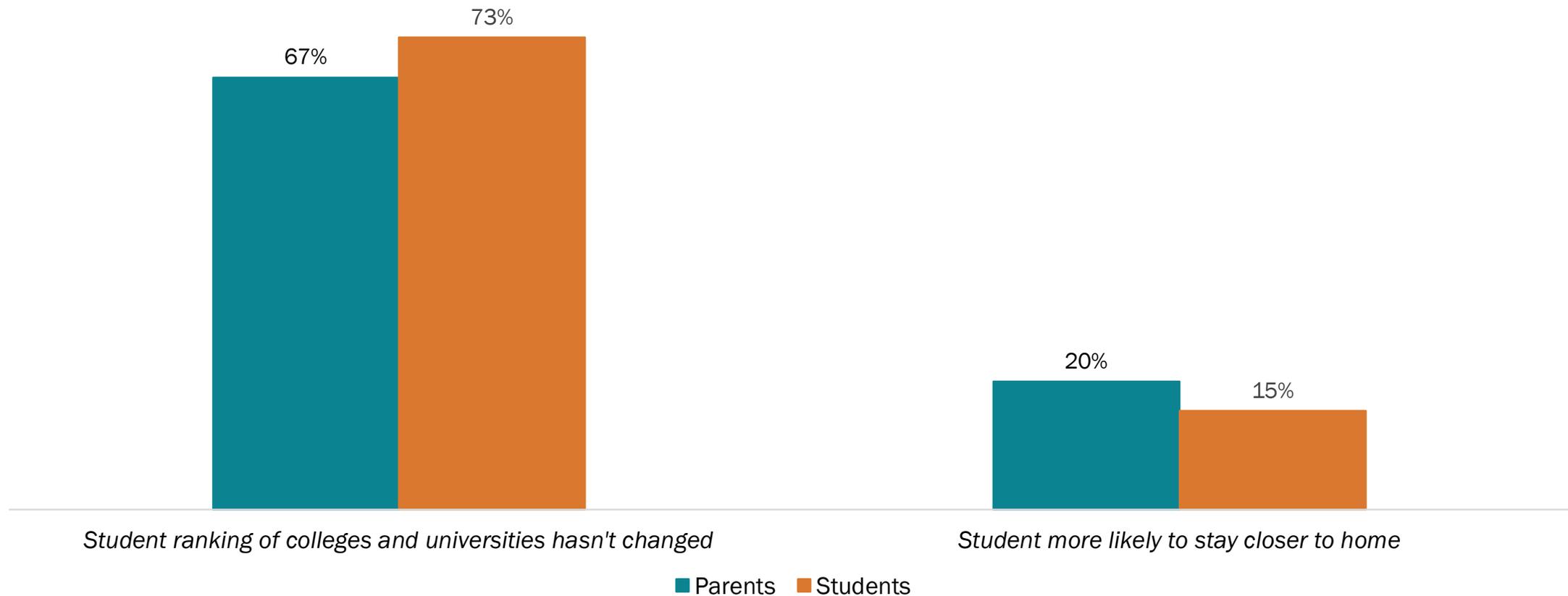
I have had difficulty reaching counselors or other staff at my current school.



% of students who selected this option

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.

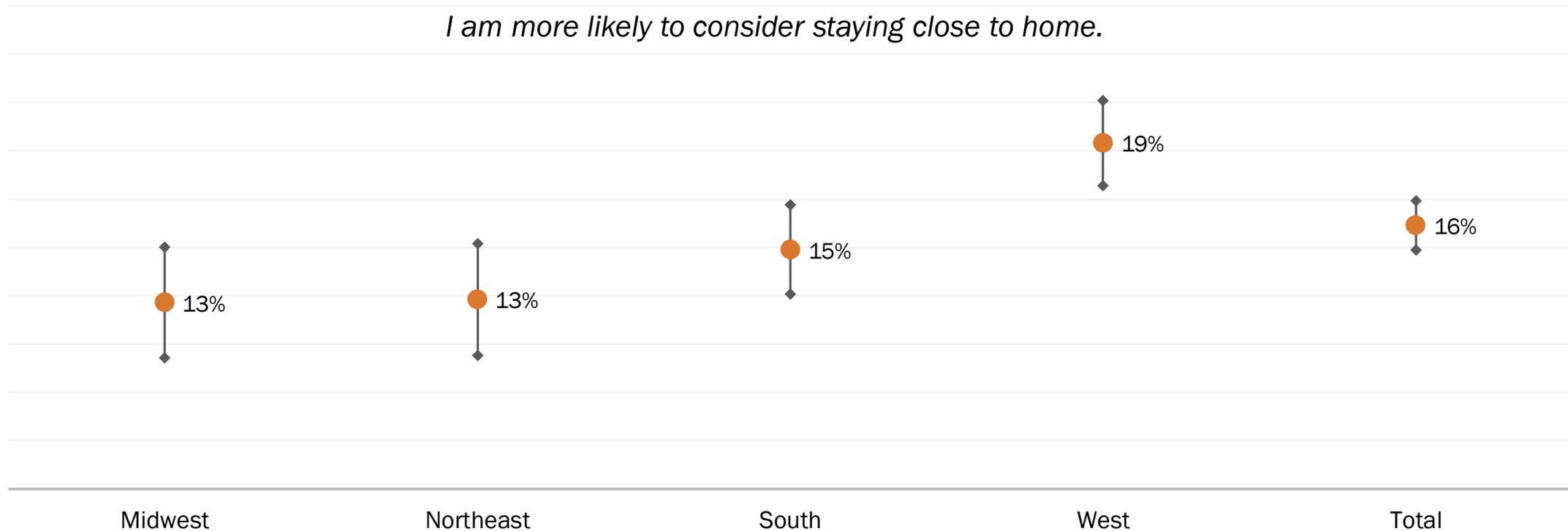


% respondents who selected that option;
All differences displayed are statistically significant.

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.



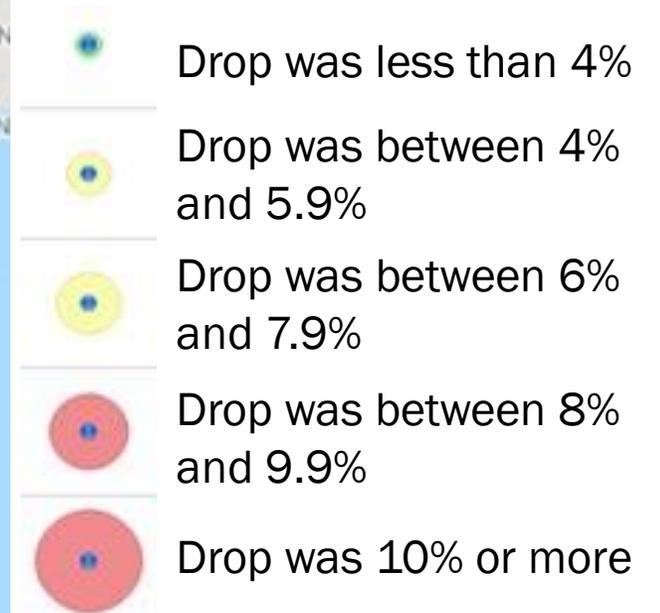
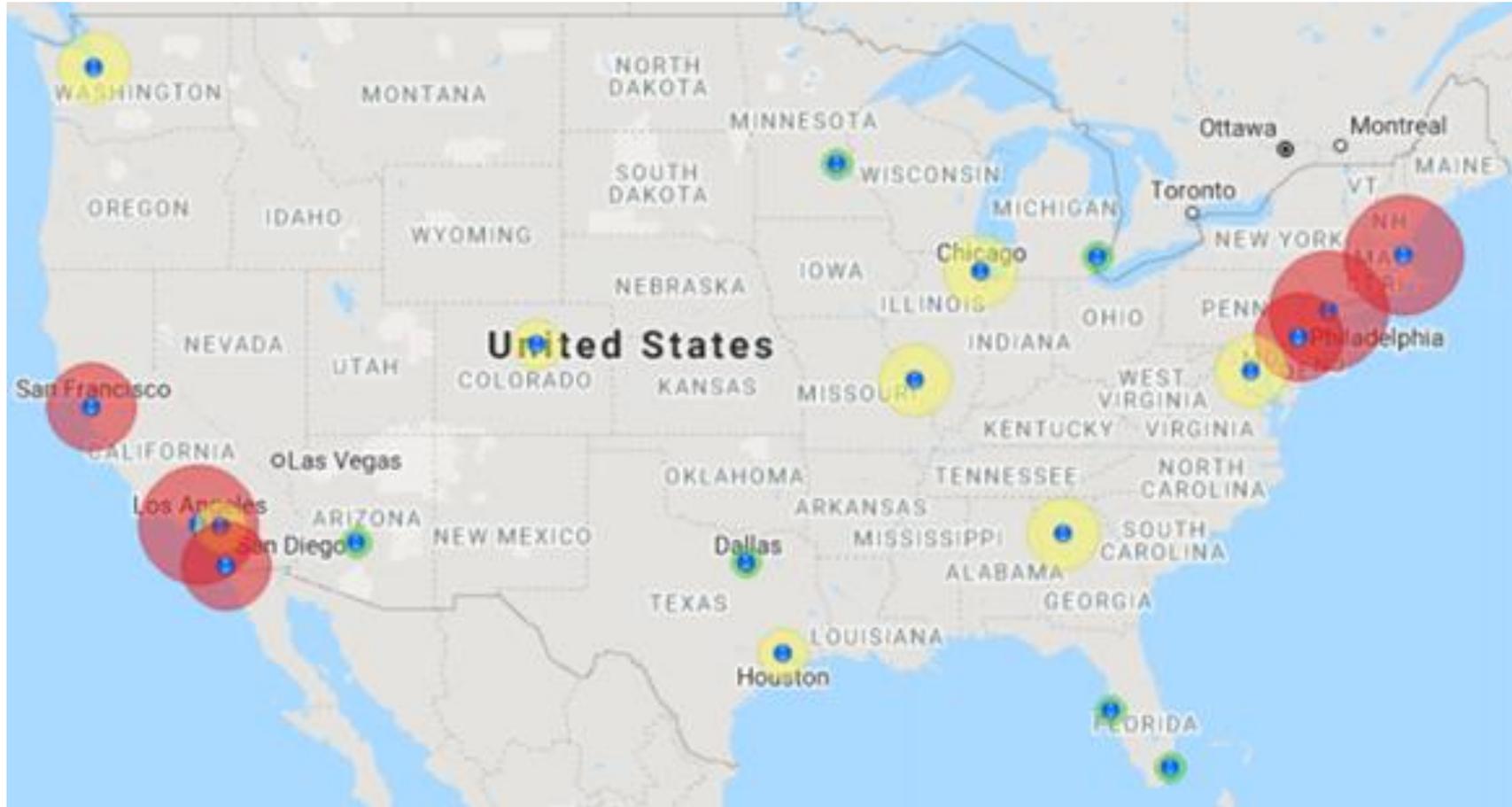
% of students who selected that option; Bands are 95% confidence intervals; Non-U.S. respondents excluded.

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

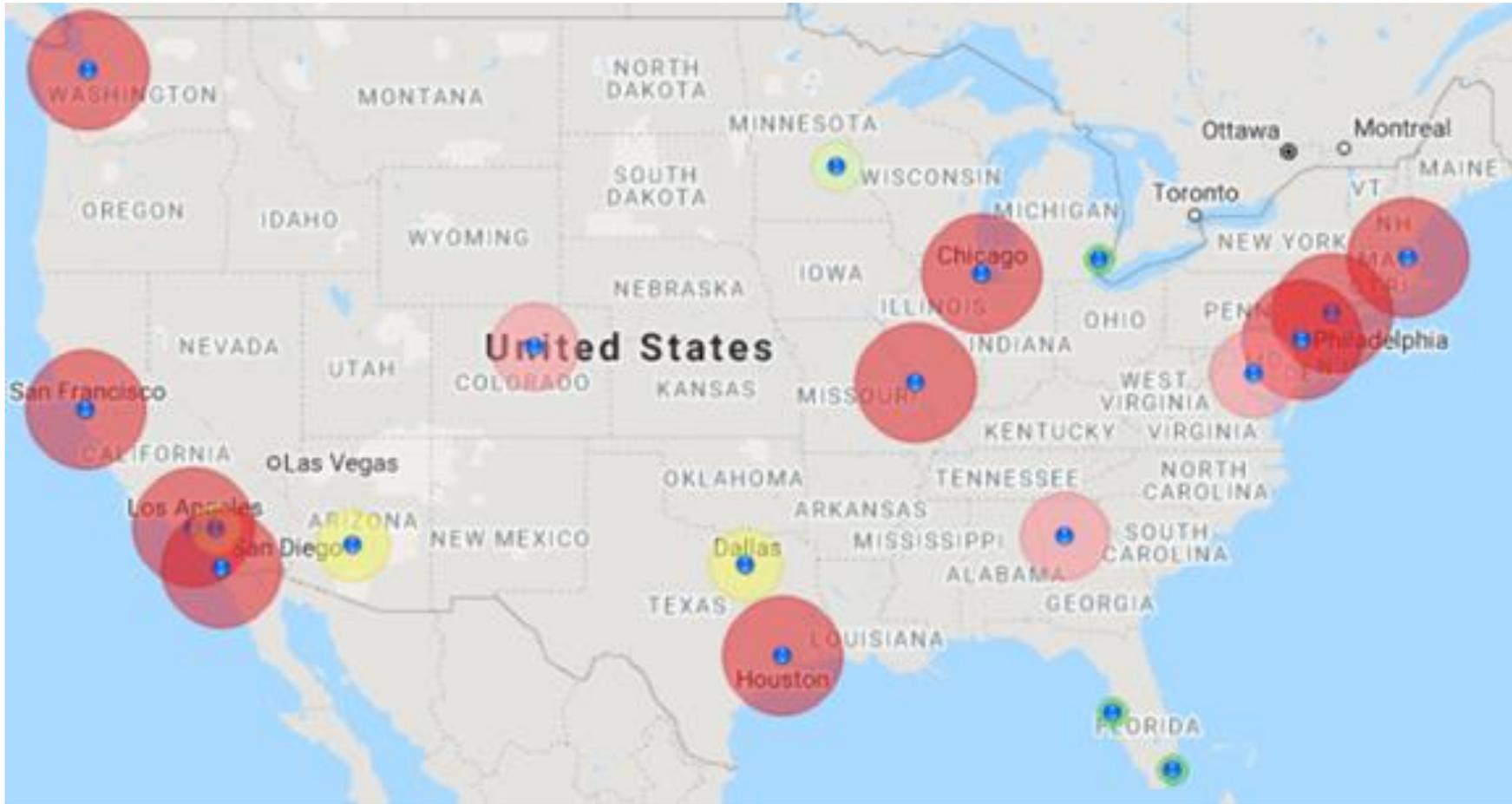
- ◆ "Please rate whether you/your student was considering **enrolling** at an institution in that city or region **before the spread of coronavirus.**"
 - ◆ Same question asked **after the spread of coronavirus** for selected markets.
 - ◆ 5-point scale ranged from "Definitely Not" to "Definitely" with 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).



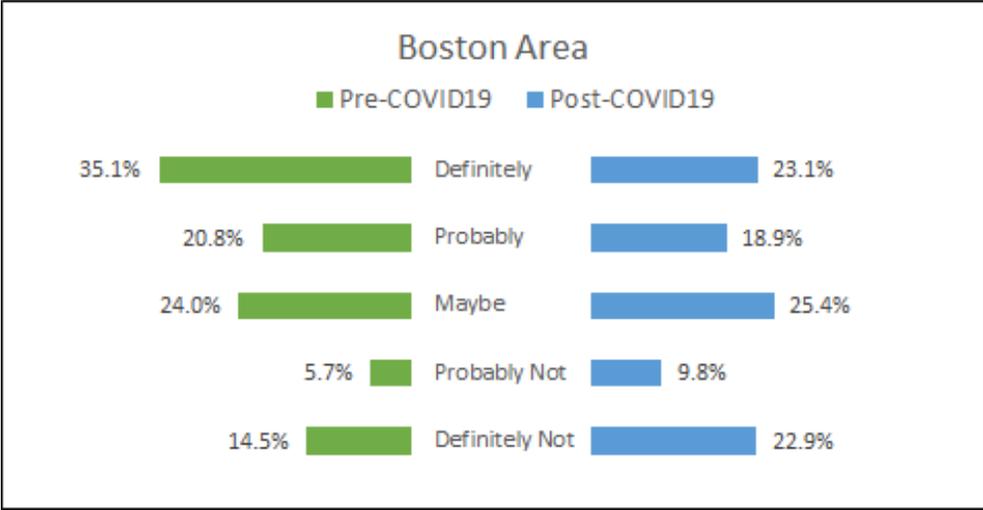
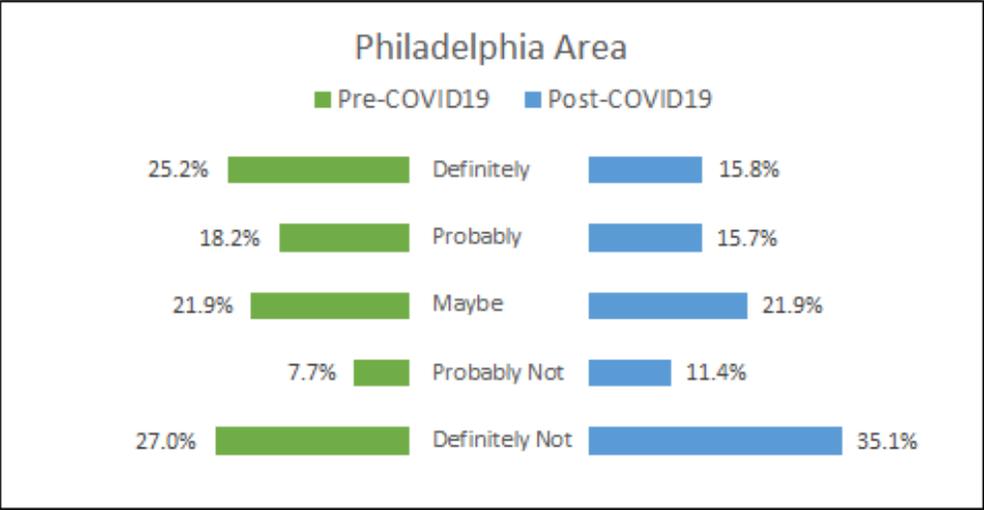
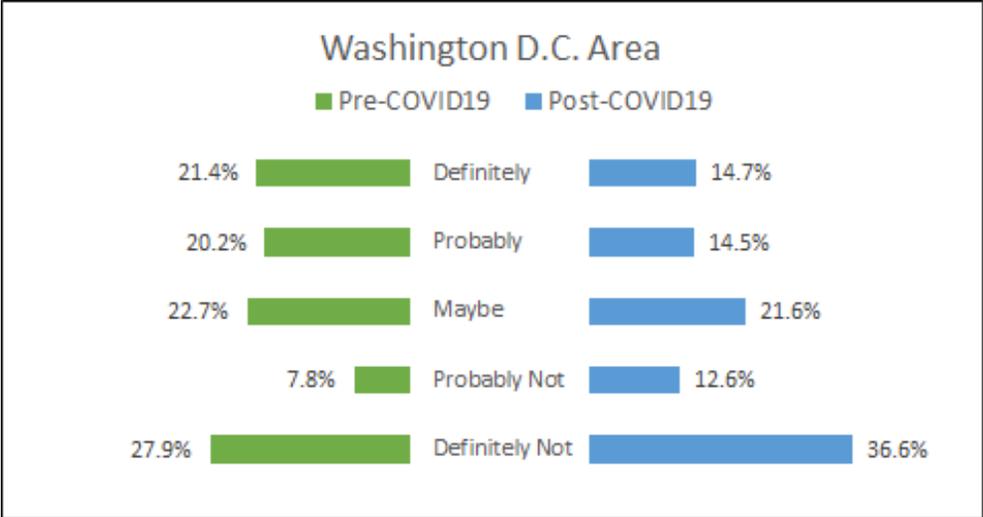
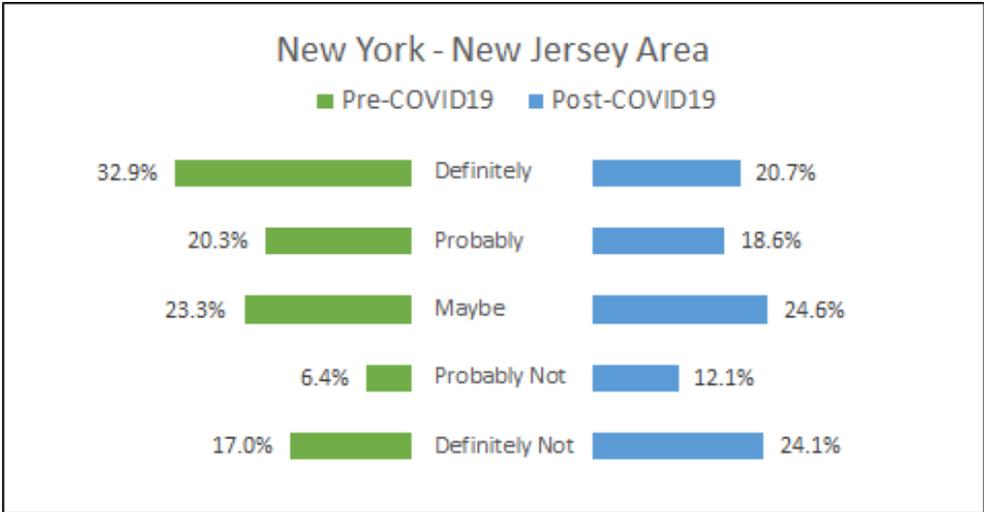
Note: Map shows relative change in **domestic students** "definitely" considering enrolling in these areas

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

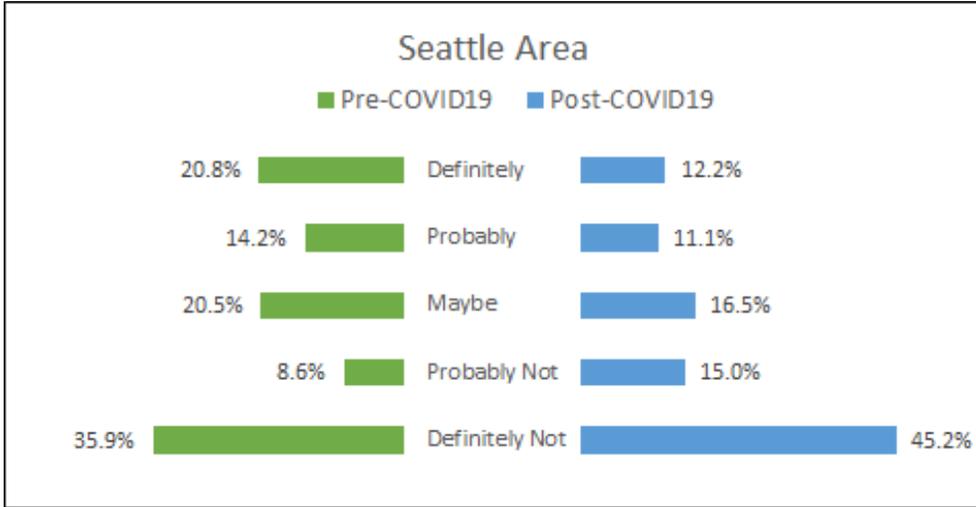
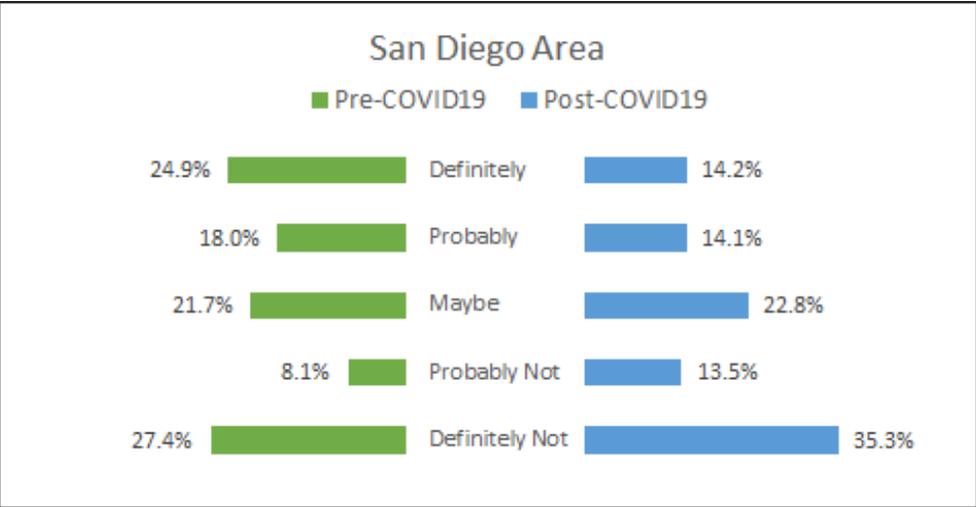
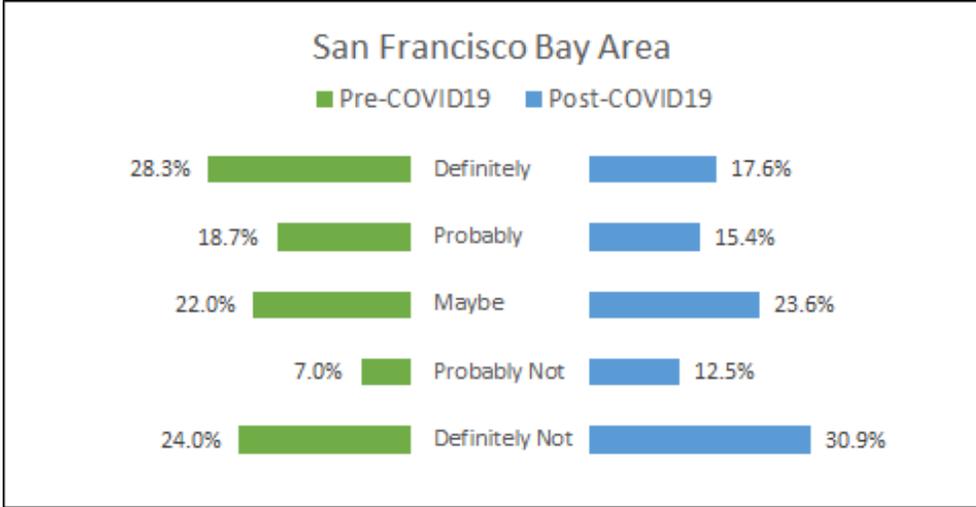
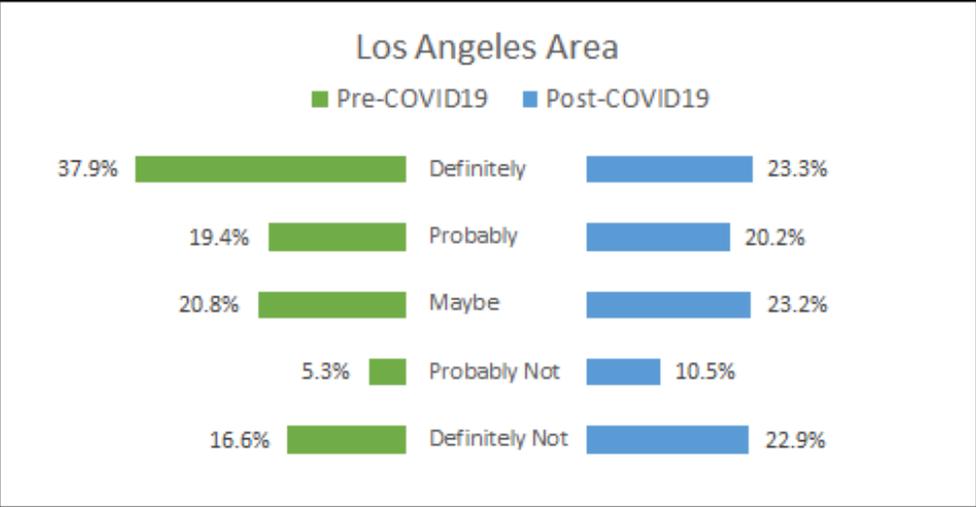


Note: Map shows relative change in **parents** "definitely" considering their student enrolling in these areas

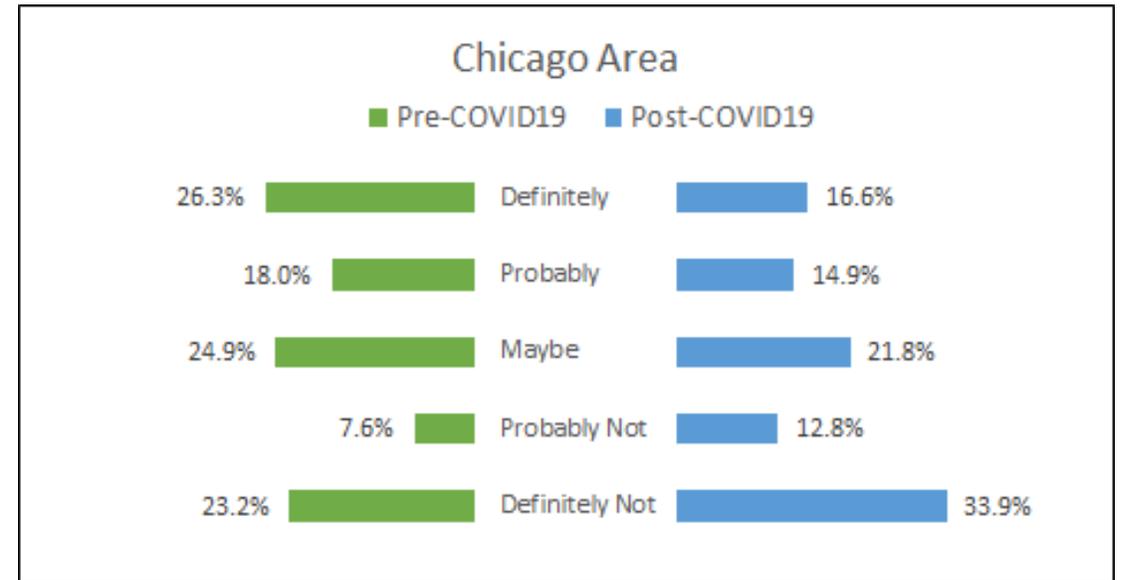
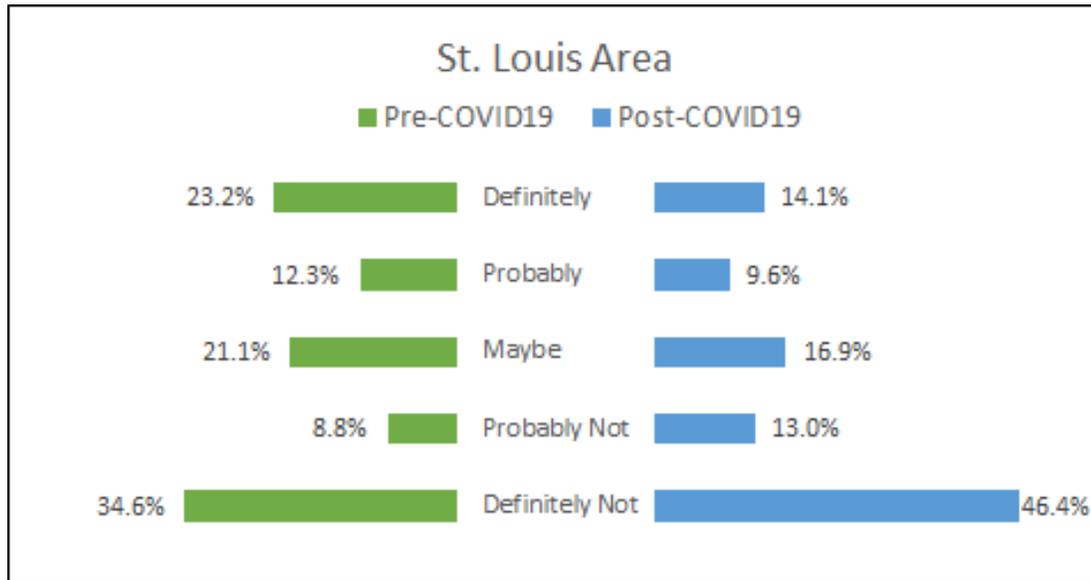
There is a full spectrum of opinions before and after coronavirus for select East Coast markets.



There also is a full spectrum of opinions before and after coronavirus for select West Coast markets.



In addition, there is a full spectrum of opinions before and after coronavirus for select Midwest markets.



Regional Differences in Metro Area Opinions

NEW YORK CITY

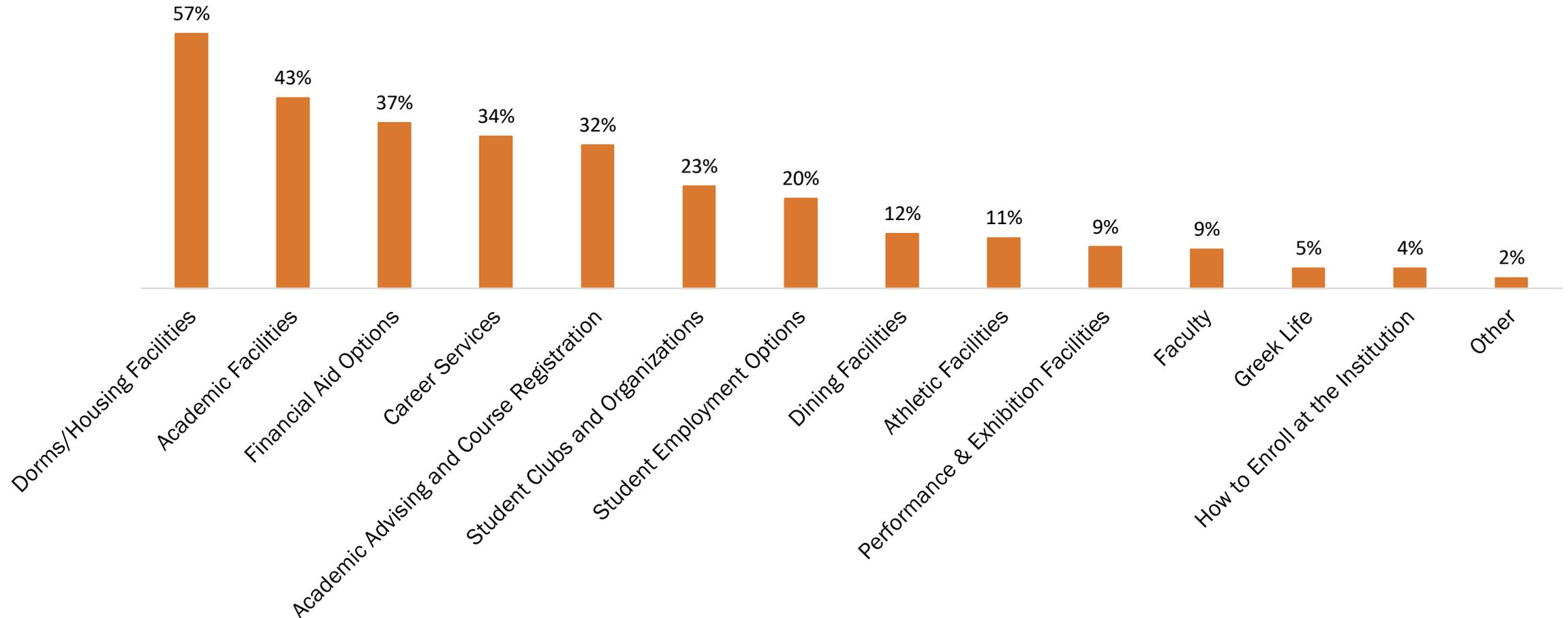
- ◆ Of the initial 675 students who stated that they were "definitely" considering enrolling at an institution in NYC before the Coronavirus, 42% stated their feelings were now not as strong.
 - ◆ This concern was much stronger in the South (49%) and West (50%), compared to the Northeast (34%).

CHICAGO

- ◆ Of the initial 403 students who stated that they were "definitely" considering enrolling at an institution in Chicago before the Coronavirus, 39% stated their feelings were now not as strong.
 - ◆ This concern was much stronger in the West (52%), compared to the Northeast (28%).

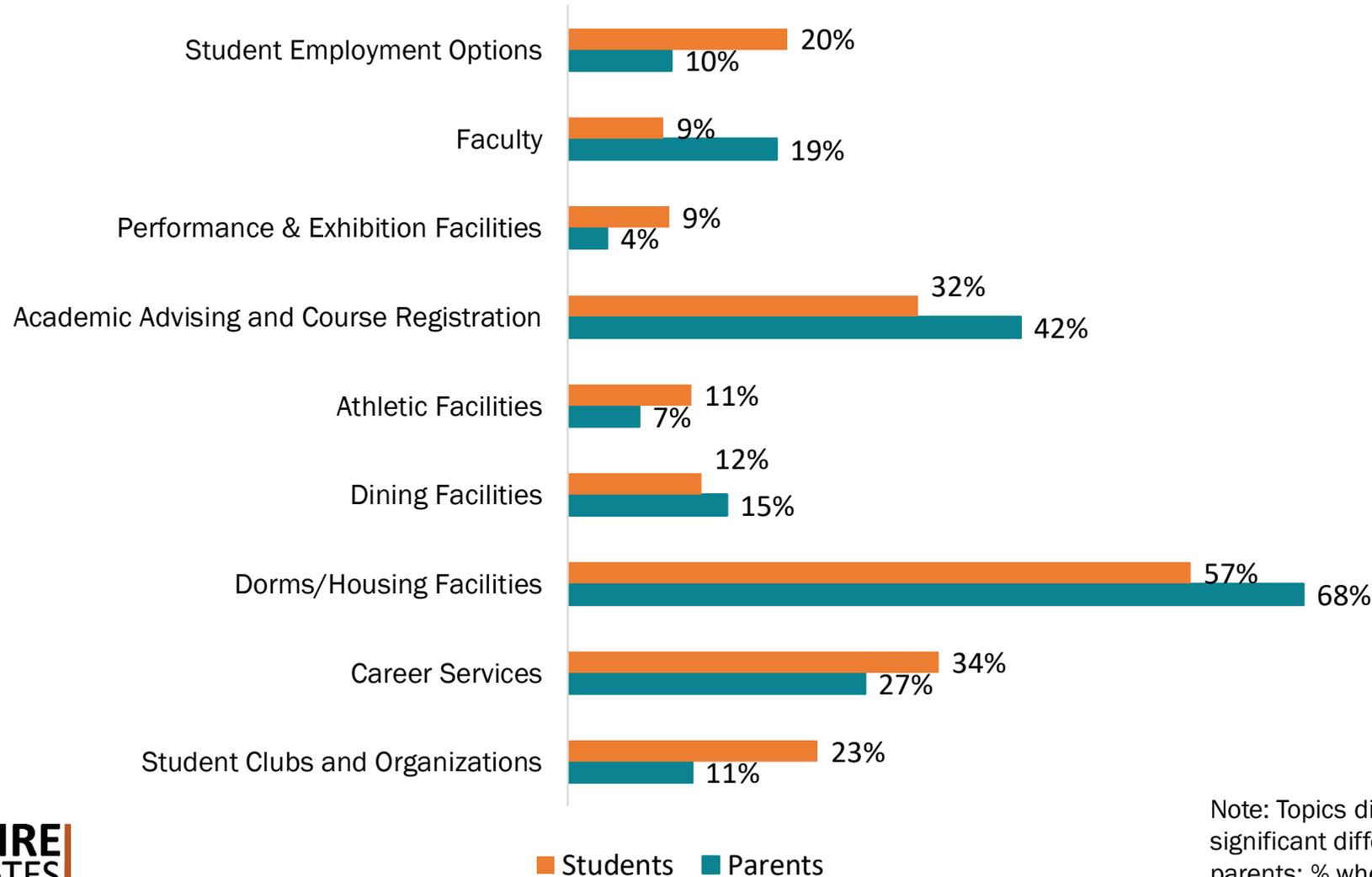
Top 3 Topics of Interest to Students

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?



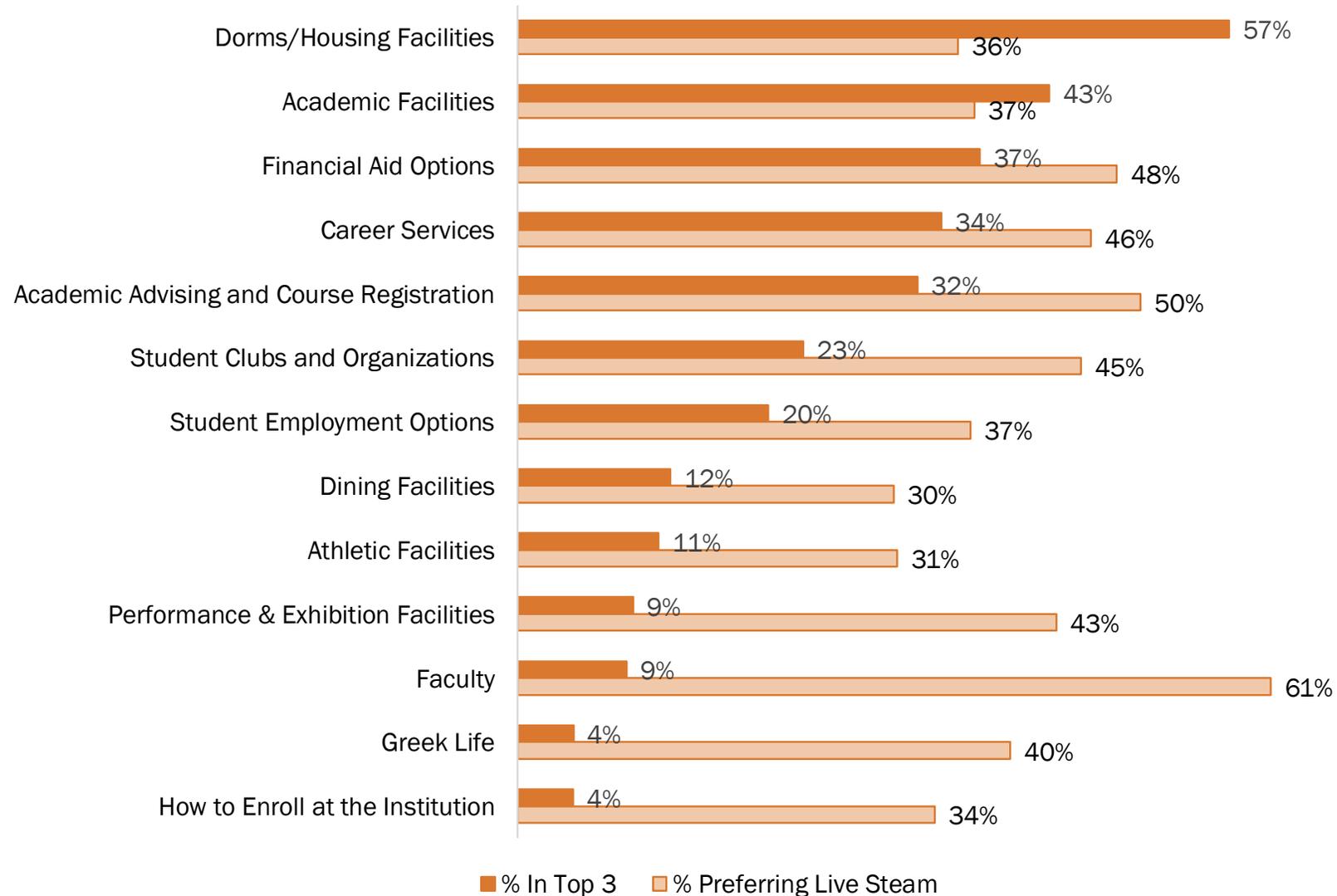
Topics of interest varied between students and parents.

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?



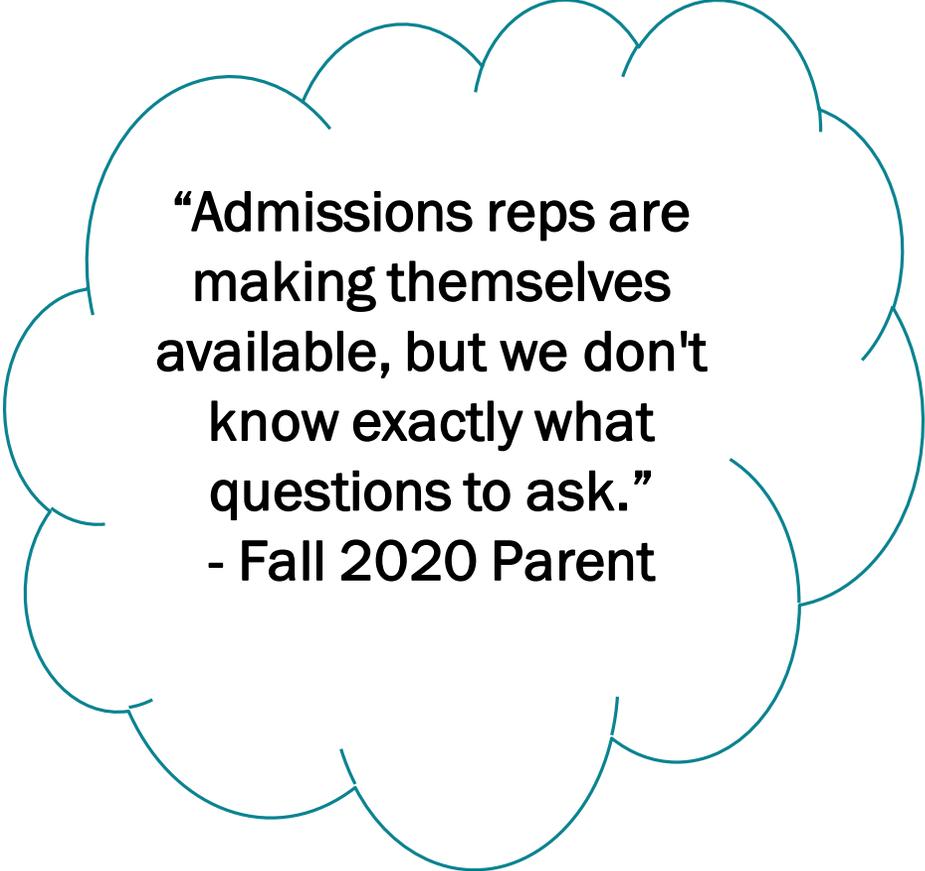
Note: Topics displayed include those with statistically significant differences between students and parents; % who selected this option

Topics and Preferred Delivery Methods Among Students



Recommendations for Virtual Yield Activities

- ◆ Organize existing digital assets into a repository so that students and parents can pick from a menu of recorded content.
- ◆ Push out recordings or announcements of livestream opportunities related to topics of broad interest (housing, academic facilities, career services) directly to students and parents by email.
- ◆ Tailor communications on more specialized topics to specific populations (e.g., scholarship and aid information to scholarship recipients, or FAFSA-filers).



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

“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

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.