

TWO INDEPENDENT NATIONAL SURVEYS

High School Seniors and Parents of High School Seniors

The Impact of COVID-19 on College Decision-Making

Fall 2020



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COMMUNICATIONS

Introduction

The COVID-19 pandemic continues to impact every sector of the economy, touching the lives of millions of individuals around the world, directly and indirectly. As the crisis has unfolded, each industry has found a way to creatively adapt and innovate to best serve its stakeholders—this includes the higher education system.

But as the pandemic continues, the question remains: What's next for higher education?

As a national strategic communications agency advising a broad clientele, we asked ourselves this question in April 2020. Through a partnership with Dynata—the world's largest first-party data and insights platform—we commissioned a survey among parents of college-bound high school seniors to evaluate the impact of COVID-19 on college decision-making.

What we found in the spring was noteworthy: 65% of parents said the pandemic had made them more cautious about the financial impact of tuition, 60% had not received any information about schools' safety plans and 40% said they preferred their child attend a school closer to home.

Since April, much has transpired in the world of higher education: Institutions are hurting financially, debating whether to resume in-person instruction and facing a crisis of trust as key stakeholders hear inconsistent messaging. These institutional challenges point to a much broader issue of communicating clearly to parents and students, who rely on timely updates to inform important family discussions happening around dinner tables across the country.

This is the backdrop for this updated national survey report prepared by Brian Communications. These new findings include the thoughts of current high school seniors likely to attend college and

their parents, providing valuable insights that will impact how colleges communicate with prospective students and their parents.

While most parents of high school seniors (73%) believe that a college education is required for a successful career, high school seniors are less certain of the value (53%). This generational shift could have broader impacts in the years to come.

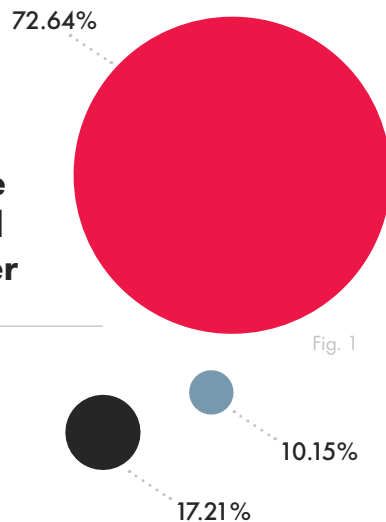
Still, parents play a large role in the decision-making process, and in fall 2020, almost half (49%) would now prefer their child attend a school closer to home, a significant jump of nearly 25% from spring 2020. Nearly a third of students feel the same way.

While many college decision-making factors have changed since our spring survey, some findings have remained static: Tuition is an enduring concern, and there is an abiding desire for transparency from colleges on key decisions and guidelines. As the pandemic carries on, potentially into the next academic year, these issues will need to be addressed. This report provides a snapshot of current attitudes on higher education and has major implications for the 2021 college admissions season. Additional findings are enclosed.

College Still Considered Key to Success

PARENTS

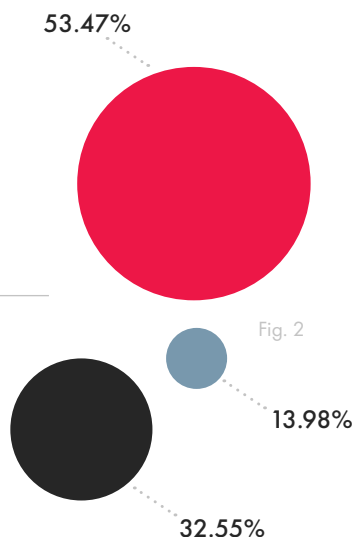
7 in 10 believe that a college education is required for a successful career



- Yes, it is required
- No, it is not required
- Not sure

STUDENTS

5 in 10 believe that a college education is required for a successful career



- Yes, it is required
- No, it is not required
- Not sure

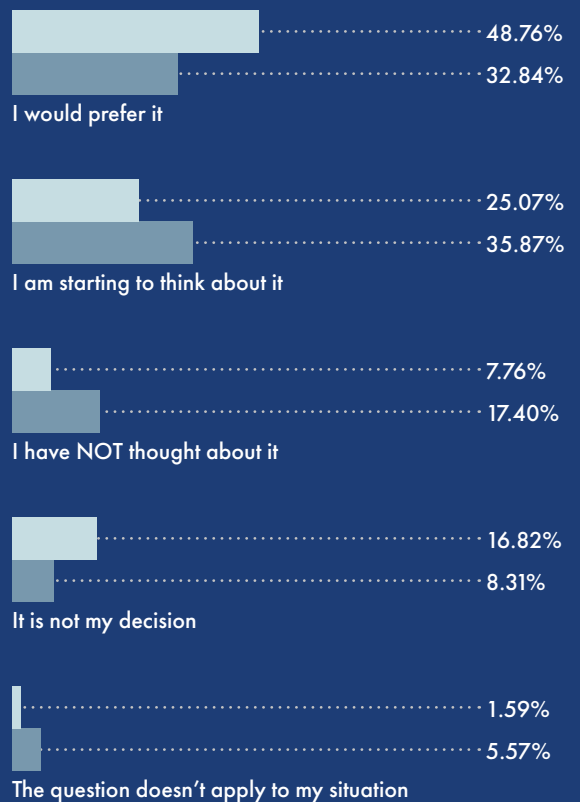
Fig. 1: Based on your child's goals, do you believe a college education is required for them to have a successful career? Fig. 2: Based on your goals, do you believe a college education is required for a successful career?

Proximity to Home is Critical

Almost half of parents would now prefer their child attend a school closer to home, a significant jump of nearly 25% from spring 2020.

Nearly a third of students agree with parents.

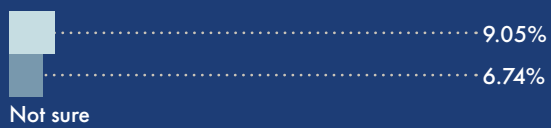
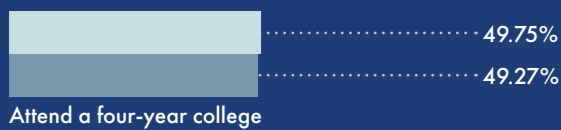
Considering the current pandemic, which one of the following best describes your thoughts about (having your child attend) attending a college or university closer to home?



- Parents
- Students

Four-Year College Remains the Favorite

Which of the following options would you prefer (your child) to do next year?

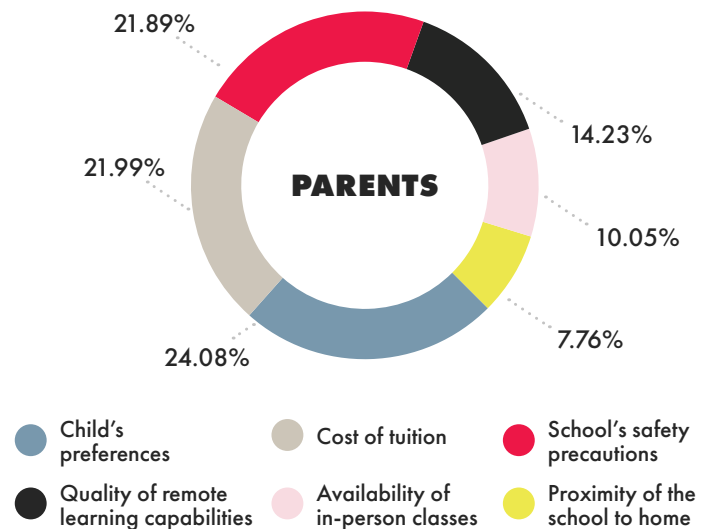


● Parents ● Students

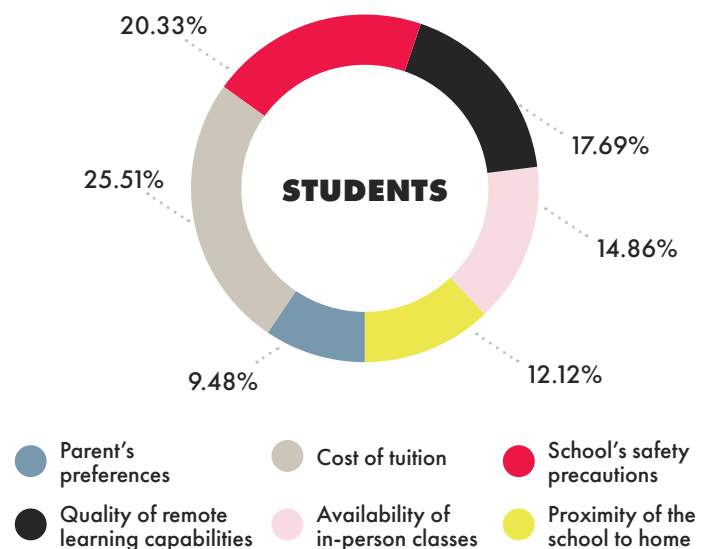
What's Driving College Decision-Making?

Cost and safety are among the top three factors for both parents and students.

Which of the following is impacting your decision-making about a college or university for your child next year the most?



Which of the following is impacting your decision-making about a college or university for next year the most?



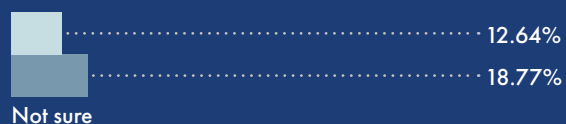
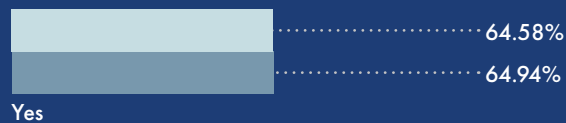
Tuition Concerns—Still Significant

PARENTS

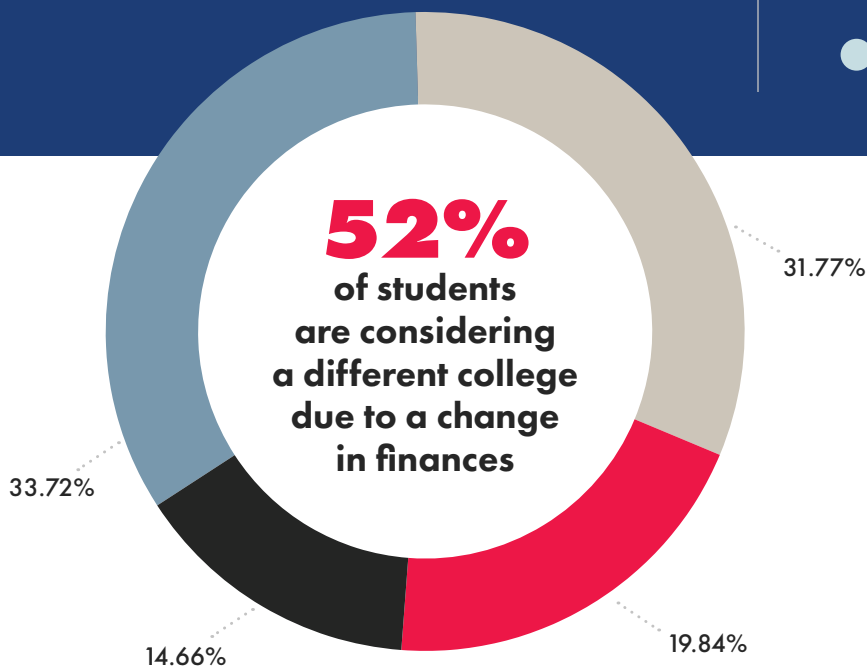
65%

still say the pandemic has made them more cautious about the financial impact of tuition, consistent with our findings from spring 2020

Has the pandemic made you more cautious about the financial impact of tuition?



● Parents, fall 2020 ● Parents, spring 2020



Are you considering attending a different college or university due to a change in financial circumstances?

- I am strongly considering it
- I have NOT considered it
- I am starting to consider it
- The question does not apply to my situation

“

I'm worried it has impacted financial aid.

A parent of a high school senior on how this pandemic has changed their child's enrollment decisions

“

I have really kept an eye on the prices of my chosen schools.

A high school senior on how this pandemic has changed their enrollment decisions

Frequent Updates Needed

If COVID-19 cases peak this winter, more than two-thirds of students and parents want updates on safety precautions **at least once a week**; nearly one in five want them **daily**.

- Daily
- A few times a week
- Once a week
- A few times a month
- Monthly
- Not interested

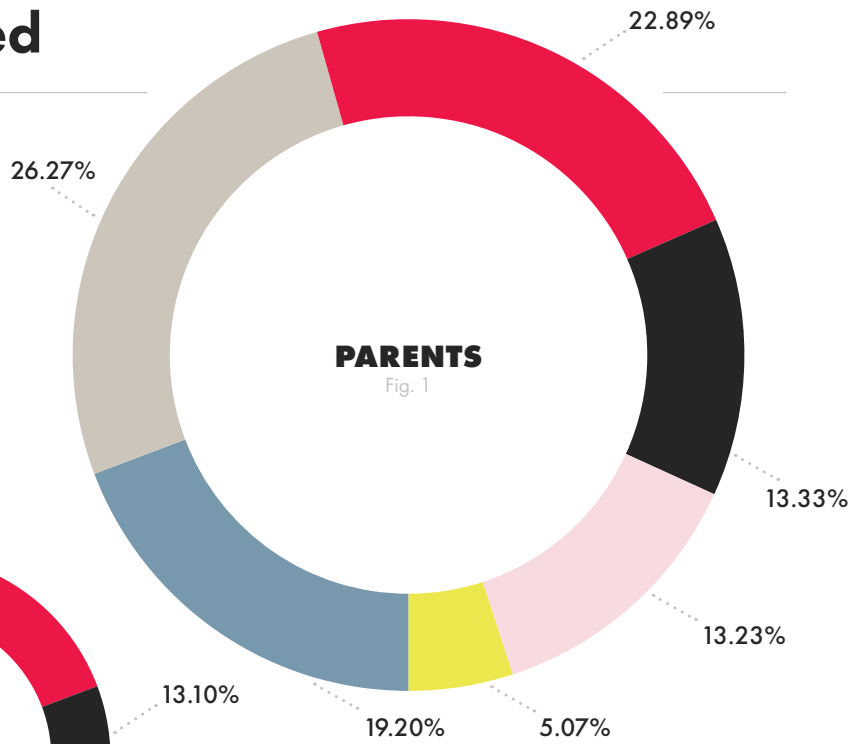
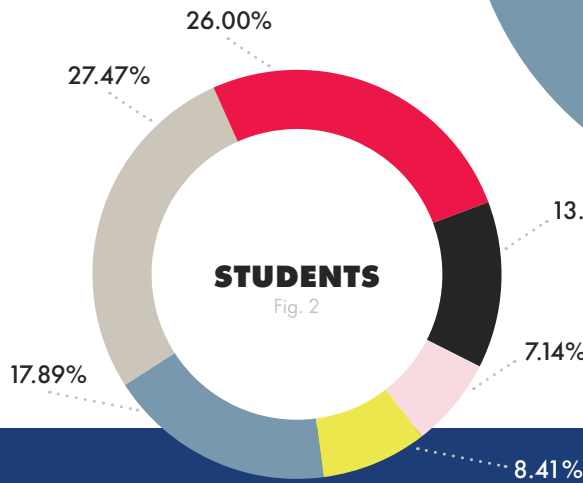


Fig. 1 and Fig 2: If the number of active coronavirus cases in the U.S. reaches a new peak this winter, how often would you like to receive updates from colleges or universities on campus safety precautions?

Email and Text Messages are Preferred

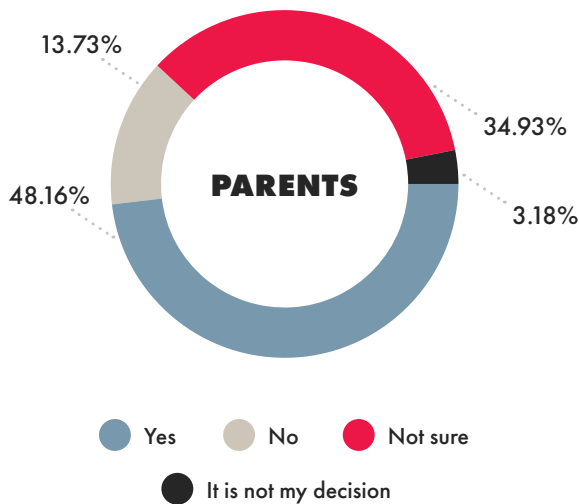
- Parents
- Students

How would you prefer colleges or universities communicate about their campus safety precautions?

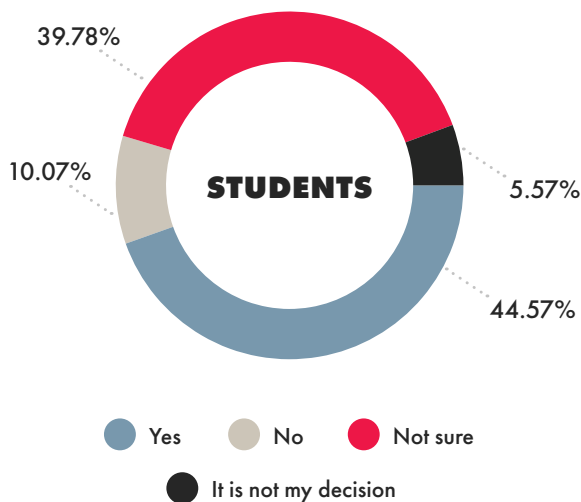


Many Unwilling to Pay Full Tuition Because...

Would you pay full tuition for your child to attend a college or university that offers a **mix** of in-person classes and remote learning for their major?



If you or your parents still have to pay full tuition, would you attend a college or university that offers a **mix** of in-person classes and remote learning for your major?



In-Person? Remote? A Mix?



I just want... the assurance that the faculty are provided lots of resources to make the best classes they can...

A parent of a high school senior on what higher education institutions can do to make them feel better about their child attending a college or university next year

Students and parents **prefer a mix** of in-person and remote learning options.

How has the pandemic impacted your feelings about (your child) starting your (their) freshman year of college in-person vs. remotely?

I prefer a mix of in-person and remote learning
Students: 44.57%, Parents: 52.64%

I'll only look at schools that allow remote learning
Students: 19.16%, Parents: 14.33%

I'll only look at schools that offer in-person classes
Students: 17.50%, Parents: 15.72%

Not sure
Students: 18.77%, Parents: 17.31%

Jury Still Out on Remote Learning



I want to make sure my son will get the proper education and not just complete the requirements.

A parent of a high school senior on what higher education institutions can do to make them feel better about their child attending a college or university next year

Four in ten students and one in three parents have a **neutral opinion** of remote learning.

What is your opinion of remote learning?

Very good
Students: 10.17%, Parents: 13.03%

Good
Students: 20.04%, Parents: 31.14%

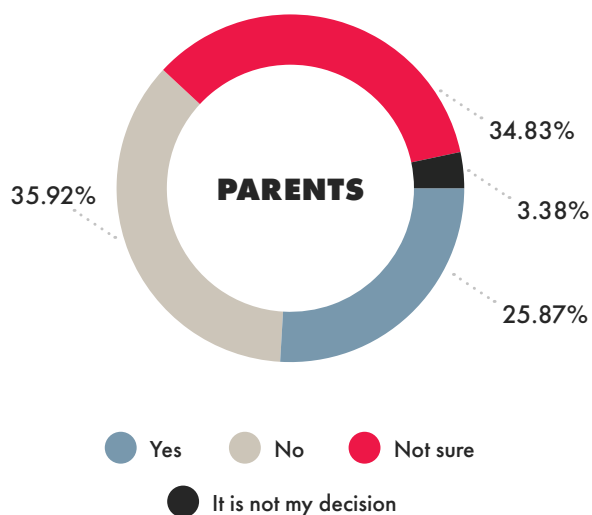
Neutral
Students: 43.11%, Parents: 31.44%

Poor
Students: 18.57%, Parents: 19.20%

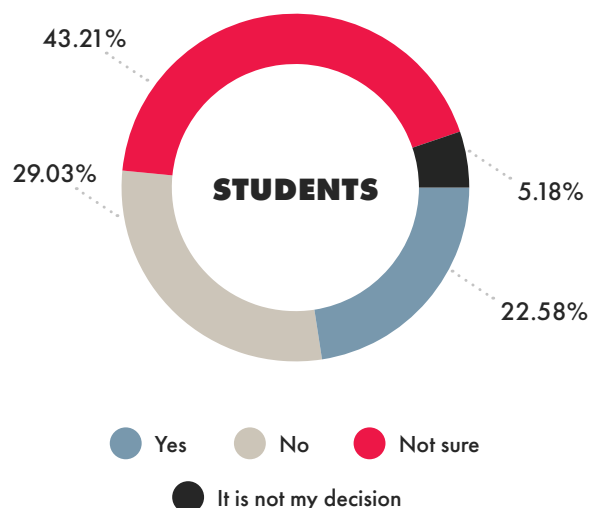
Very poor
Students: 8.11%, Parents: 5.17%

Even Less Willing to Pay Full Tuition

Would you pay full tuition for your child to attend a college or university that only offers remote learning for their major?



If you or your parents still have to pay full tuition, would you attend a college or university that only offers remote learning for your major?



In what ways, if any, has this pandemic changed your child's enrollment decisions?

"She is tentative/apprehensive about applying—not sure what she's applying to?"

"Both my 19 and 17-year-old have decided to delay college plans for 2 years."

"Thinking about better laptops... and spending time at home."

"She has decided to stay a bit closer to home, thank goodness."

"They are more hesitant to move away."

"She may want to do a semester remotely for a year and then go on campus the remaining three years if possible."

"Keeping everything on hold. He doesn't want to get too excited about something that might not happen due to circumstances beyond his control."

What can higher education institutions do to make you feel better about your child attending a college or university next year?

"Have in-person classes. The risk of isolation is much higher than the COVID-19 risk in this age group."

"Keep releasing the number of students attending that are currently positive for COVID-19 and what the university is doing to keep students safe."

"Transparency. I want to know their safety precautions. I want to know how closely they are following them. I want to know the quality of their remote teaching. And I want open communication."

"I can read the numbers and review major requirements myself. What we can't do is get a feel for what it's like to LIVE there... Be real. Be honest."

"Offer tiered tuition based on remote, remote hybrid and in-person learning."

"Just keep me updated on their pandemic response."

Is there anything we did not ask that you feel is important as a parent of a high school senior who is considering attending a college or university next year?

"The social aspect of college is a part of the experience, too. If attending, that needs to be addressed."

"It is important to communicate to our kids that there are many options and taking time to let things settle is okay."

"Some colleges are saying kids can only be considered for scholarships if they take the SAT but it hasn't been offered in our area for MONTHS."

"Colleges should all detail their COVID-19 response plans for 2021 freshmen on their websites."

"Tuition is the real issue. Is going into debt for an education you may not use, or be able to pay for, worth it?"

"Is not going an option that is being considered due to the pandemic?"

"Will it hurt to take the year off?"

"It is a very uncomfortable and uncertain process. We are not sure what to expect or request."

"Really consider value if looking at remote only learning."

In what ways, if any, has this pandemic changed your enrollment decisions?

"It has made me really think about whether it is important to stay close to home, and whether I will be able to successfully complete my major through remote/distance learning options."

"I need in-person instruction, and Zoom does not allow for the kind of learning environment in which I thrive. I pay for college, and it's not a requirement like high school, so I want to get my money's worth with an education that suits me."

"It has made me consider wanting to take a gap year to save up money and ensure that I'll be able to get the full experience with in-person classes."

"I have decided to stay closer to home to help care for immunocompromised family members."

"If the college is doing a poor job at controlling COVID-19, then I instantly say no."

What can higher education institutions do to make you feel better about attending a college or university next year?

"Give me a solid answer that I will be able to go to in-person classes for at least some of my classes."

"Assure time and leniency for a new online learning curve."

"I would think a constant update of the situation and how they are dealing with it would be good to ease the minds of students. Also, cut the tuition down by a percentage, since most students are struggling financially right now."

"Be open about scholarships and make them accessible, and lay out a clear distance learning plan so I know what is expected of me when I start classes."

"Limit the amount of people allowed in a room, classroom, and common area; always require the use of masks except when in dorm rooms, require students and staff to get tested monthly."

Is there anything we did not ask that you feel is important as a high school senior who is considering attending a college or university next year?

"How will seniors this year be transitioned if they 'lose ground' over the course of the 2020-21 school year?"

"I think that as a high school senior, we need to make it normal to attend a community college... a lot of people look down upon it."

"How would we feel about living on campus in a dorm? COVID-19 has made me especially want a single room, if possible."

"I think it is important to ask if there are any specific states that the student is planning to avoid/go to depending on the COVID-19 situation."

"SATs and ACTs are a concern for many seniors, so it would be amazing if these policies are clearly advertised for a better-informed admissions process."

Methodology

With sample sizes of 1,005 parents of high school seniors likely to attend college and 1,023 high school seniors likely to attend college, these independent, online national surveys had a margin of error of +/- 3.1% at the 95% level of confidence. Research participants in each study were geographically dispersed to include all regions of the country. The survey of parents of high school seniors was conducted between October 4 and October 10, 2020. The survey of high school seniors was conducted between October 4 and October 15, 2020.

1,005

Parents of High School Seniors Likely to Attend College

Male: 500, Female: 500, Prefer Not to Answer: 5

Under 35: 2.69%, 35-44: 38.91%, 45-54: 42.89%, 55-64: 14.93%, 65+: 0.50%, Prefer Not to Answer: 0.10%

1,023

High School Seniors Likely to Attend College

Male: 500, Female: 500,

Prefer Not to Answer: 12, Other: 11

About Brian Communications

Brian Communications is a national strategic communications agency headquartered in Philadelphia with experience working with clients such as the University of Chicago, University of Pennsylvania, Villanova University, Saint Joseph's University and Widener University. Other clients include Uber, Blue Cross Blue Shield Association, PokerStars, Penn Medicine, BELFOR Property Restoration and Independence Blue Cross. Focused on strategic ideas that advance business goals, the firm's services include strategic planning, brand positioning, reputation and crisis management, advertising, social media strategy and media relations.

The agency is led by Brian Tierney, current Chairman of the Poynter Institute Foundation. Tierney is the former publisher of the Pulitzer Prize-winning The Philadelphia Inquirer and Daily News, the former CEO and founder of a communications agency acquired by the Interpublic Group and has served on several university boards. David Demarest is a senior advisor at Brian Communications, overseeing higher education marketing efforts. Previously, Demarest was vice president for public affairs at Stanford University, where he spent more than a dozen years leading government relations, community affairs and communications.

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