



Perspectives and attitudes of college students participating in remote learning

Based on a national student survey conducted
mid to late April 2020

May 2020

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Executive summary

EY-Parthenon analysis of remote learning student attitudes

Overview: In April 2020, EY-Parthenon assessed the experiences, concerns and intentions of 3,675 college students participating in remote learning across four-year and two-year public and private nonprofit institutions. The intent of the survey was to provide insight to colleges and universities to help them improve remote engagement and learning for students.

Key insights: The potential for withdrawal or transfer is acute if institutions do not clearly communicate how they are addressing student concerns. While students share common characteristics (i.e., a desire for communication about fall 2020), their needs are not monolithic. Recognizing and understanding the different student segments can help identify how to tailor communication and address specific top-of-mind concerns.

- ▶ Overall satisfaction is largely polarized but uncorrelated with school size or selectivity underscoring the impact of individual learning experiences.
- ▶ Roughly one in five students indicate that they are neutral to negative about returning to their school in the fall and, if fall is to feature remote learning, they expect a discount relative to what they were paying.
- ▶ Survey results suggest that five distinct student segments exist, based on differing attitudinal factors toward remote learning and expectations for the fall semester.
- ▶ While these attitudinal segments are more prominent in some institution types, they are present everywhere.

The segment profiles present summarized survey data and a point of view on:

- ▶ **Student perspectives:** the interpreted attitude, preferences, concerns and context of learning for a typical student in this segment
- ▶ **Communication needs:** the messaging colleges and universities can emphasize to address this segment's priority concerns
- ▶ **Programmatic considerations:** the adjustments most likely to improve this type of student's remote learning experience

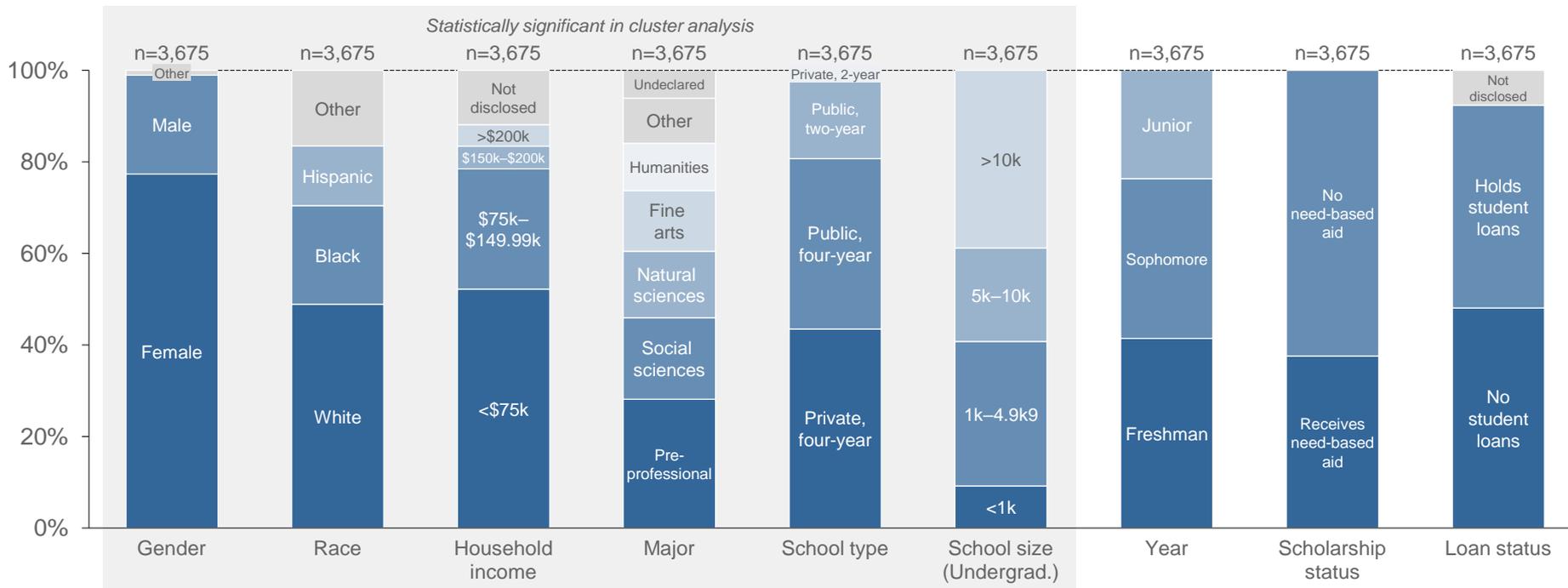
Agenda

- ▶ **Satisfaction with remote learning**
- ▶ Expectations for fall term and pricing
- ▶ Student segmentation

Methodology

EY-Parthenon analyzed data from the student survey, fielded for ~2 weeks with 3,675 complete responses, to identify five student segments

Overall survey respondent demographics



Cluster analysis methodology

- ▶ EY-Parthenon conducted a **two-step cluster analysis** to segment survey respondents into five groups based on responses to questions assessing:
 - ▶ Expectations for fall delivery method
 - ▶ Likelihood to return to a student's institution
 - ▶ Pricing (tuition and fees) adjustments if learning remains remote

- ▶ EY-Parthenon then conducted a **comparison of means procedure** to gather qualitative insights for student segment profiles, using respondent demographic data as well as to questions probing satisfaction levels with elements of remote learning.
- ▶ **Note:** Overall survey respondent demographics are not directly representative of national averages. To preserve data quality, segment comparisons have been kept relative to the average survey respondent.

Overall satisfaction with remote learning

Overall, student satisfaction is relatively polarized but uncorrelated with school type, size or selectivity, underscoring the impact of individual learning preferences

Overall satisfaction with remote learning, by institutional characteristics

Q: What is your overall satisfaction with your remote learning experience?

Please rate on a scale of 1 to 7, where 1 = "Not at all satisfied" and 7 = "Extremely satisfied"



Overall satisfaction with remote learning

Higher-income, white, and female students cite slightly lower satisfaction

Overall satisfaction with remote learning, by student characteristics
 Q: What is your overall satisfaction with remote learning?
 Please rate on a scale of 1 to 7, where 1 = "Not at all satisfied" and 7 = "Extremely satisfied" [ALL]

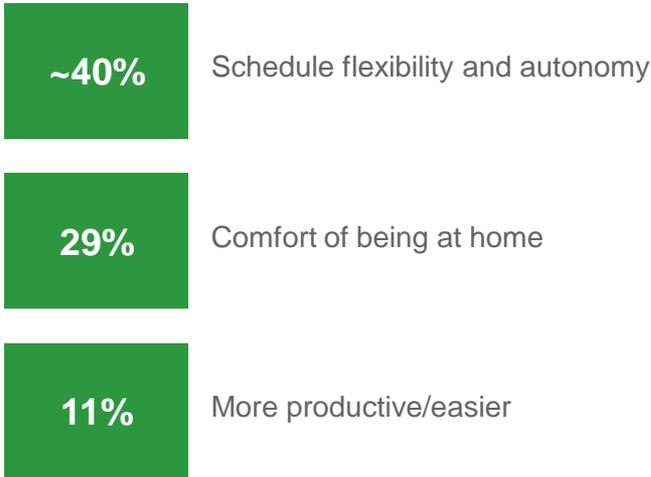


*Underrepresented minority includes Black, Hispanic, and Native American students.
 Source: EY-Parthenon remote learning student survey (April 2020)

Satisfaction with various components of remote learning

Top likes and dislikes, based on open-ended responses provided by students

Top likes*



Top dislikes*



*As percentage of all open-ended responses provided
Source: EY-Parthenon remote learning student survey (April 2020)

Satisfaction with various components of remote learning

Academics: in terms of course quality in remote format, satisfaction is lowest for courses with lab or fieldwork

	Quality of:	Satisfied	Neutral	Dissatisfied
Interactions	Interaction and collaboration with classmates	49%	18%	33%
	Interaction and collaboration with professors	54%	20%	26%
Class types	Remote learning experience for classes with required fieldwork	43%	19%	38%
	Remote learning experience for lab classes	40%	18%	42%
	Remote learning experience for large lecture format classes	51%	22%	27%
	Remote learning experience for smaller, seminar-style classes	56%	20%	24%

Note: Excludes "N/A" responses

Source: EY-Parthenon remote learning student survey (April 2020)

Satisfaction with various components of remote learning

Supports: in terms of access, advising and tutoring fare relatively well compared to health and mental health support as well as other admin supports

Access to:	Satisfied	Neutral	Dissatisfied
Academic advising	55%	20%	25%
Tutoring and office hours	54%	21%	25%
Admin supports (e.g., registrar, financial aid)	47%	21%	32%
Career planning services	48%	21%	31%
Health services	42%	20%	38%
Mental health services	46%	17%	37%
Remote methods/video communications	66%	16%	18%
Technology support staff	49%	21%	30%
Wi-Fi (i.e., did not have at home)	59%	16%	25%

Satisfaction with various components of remote learning

Academic improvements: if there was one learning improvement you could suggest, what would it be?

~18%

Share of respondents who believe **enhanced technology and training** would be the best possible improvement

*“Remote learning could be made better if everyone had more knowledge and guidance on how to use it, **on how to effectively use the platforms** and make the most of virtual, from the professors to the students.”*

– College freshman

*“We should have classes that were **designed for remote learning** going in. It would also very much help to use platforms the professors are actually comfortable with, or train them, and platforms that are equipped for the amount of server traffic.”*

– College sophomore

~11%

Share of respondents seeking changes to class structure, **split evenly** between requests for synchronicity and asynchronicity

*“I think **prerecorded lessons would be more helpful** than the real-time lectures. For my online classes that I was already taking, we used that method, and I find it easier to work with on my own terms. It’s less hurtful to my limited Wi-Fi data as well!”*

– College sophomore

*“**Having more live lectures.** I know it may inconvenience professors, but I found I was much more motivated to follow through with my course work when I had to connect with my professor at the regular class time. Recorded lectures don’t work well for me.”*

– College freshman

Satisfaction with various components of remote learning

Engagement improvements: What could change regarding how you can engage with your professors, classmates or extracurricular teams?

~20%

Share of respondents who desire **greater interaction with professors and classmates** as a part of remote learning

*“One improvement to remote learning would be for professors to continue offering their normal office hour times. **Since moving online, professors haven’t had any office hours and aren’t replying to emails, making it difficult to engage with them.**”*

– College junior

*“I want **more student engagement** — asking material comprehension questions during class via polls and making more breakout rooms or small groups to facilitate discussion where everyone can turn their mics on.”*

– College freshman

~40%

Share of respondents seeking to **use technology to continue clubs and create new virtual events** and activities

*“I think **clubs** could host meetings over Zoom or another video chat service. Also, doing **team-bonding activities over Zoom**, like a workout class, movie night or discussion, could help students feel more connected to the clubs, other activities and each other.”*

– College junior

*“I would like to still be **connected to my clubs and activities, at least over Zoom** or some other method, but the college has not offered that to us.”*

– College freshman

Agenda

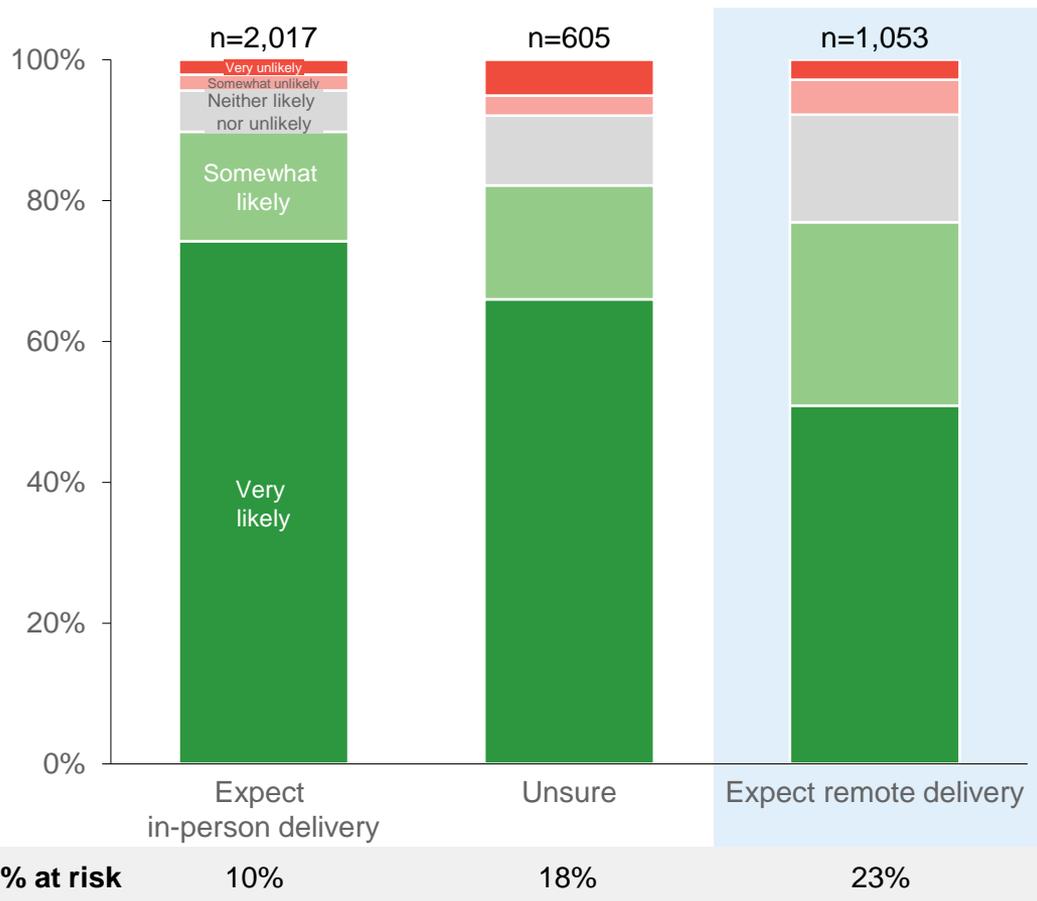
- ▶ Satisfaction with remote learning
- ▶ **Expectations for fall term and pricing**
- ▶ Student segmentation

Expectations for fall term and pricing

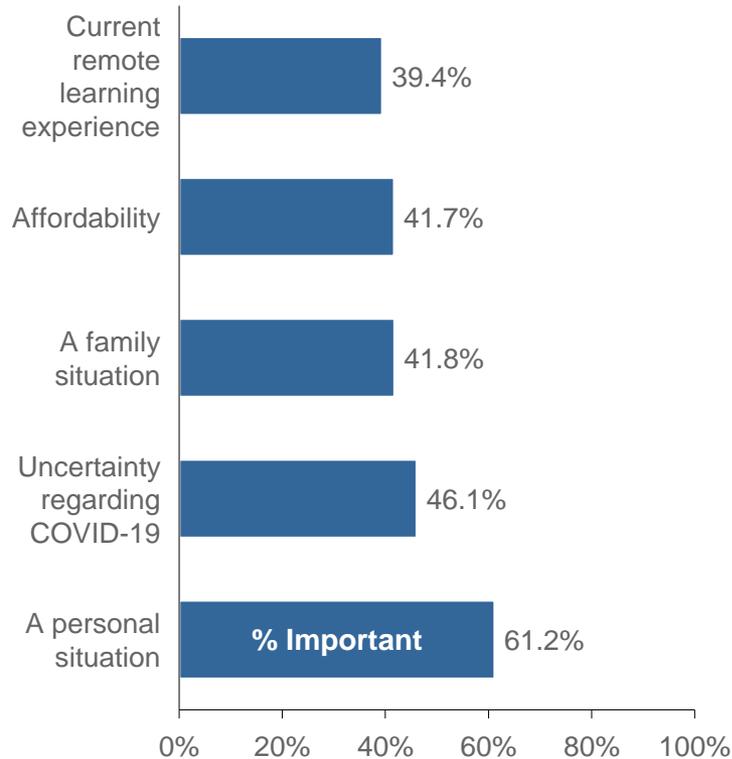
Students who believe course delivery will remain remote are the most likely to withdraw; educational quality is cited as a major drawback

Likelihood to remain enrolled at current institution in fall 2020, by fall 2020 delivery expectation

Q: What are your enrollment expectations for the coming fall term at your current college/university?



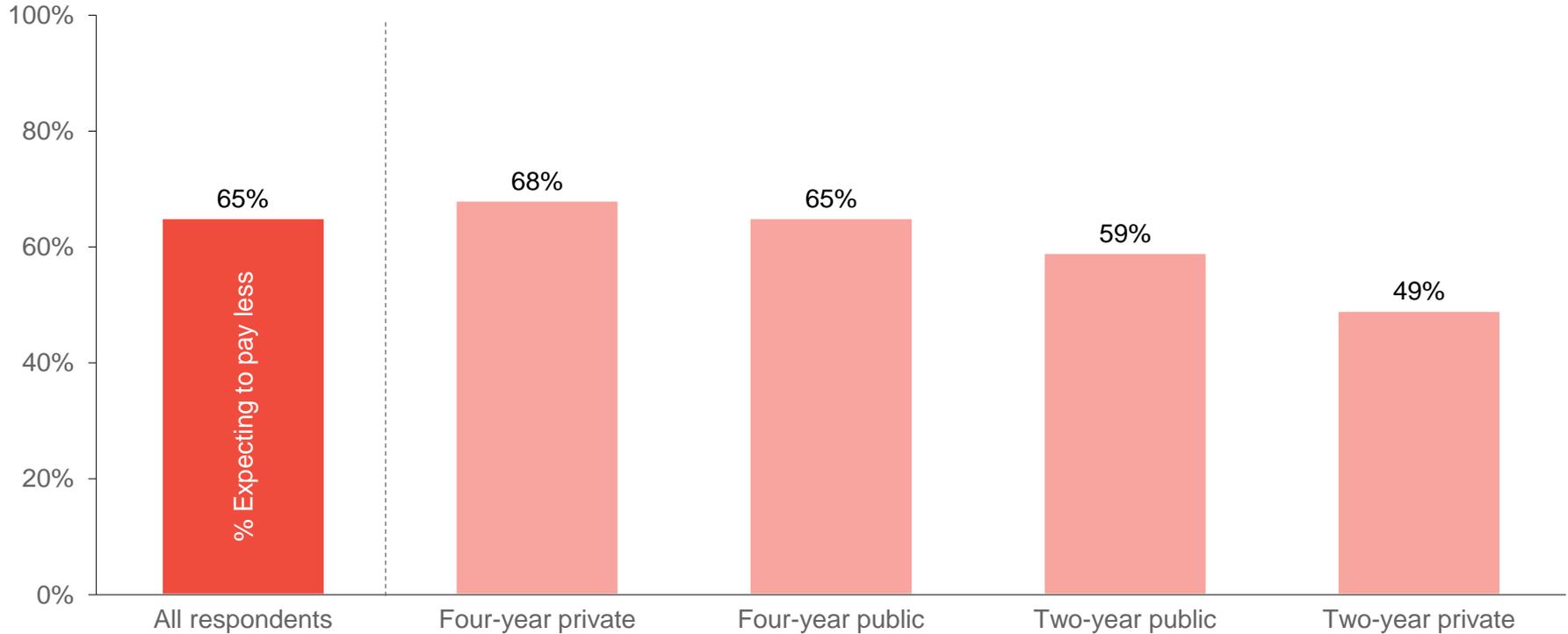
Factors influencing withdrawal intent



Expectations for fall term and pricing

Approximately 50% to 70% of respondents, depending on institution type, expect tuition and fees to be reduced if courses remain remote

Pricing (tuition and fees) expectations if fall 2020 is remote
Q: How do you anticipate overall cost (tuition and fees) to change if courses remain remote at your current college/university?



% Expecting to pay less

All respondents

Four-year private

Four-year public

Two-year public

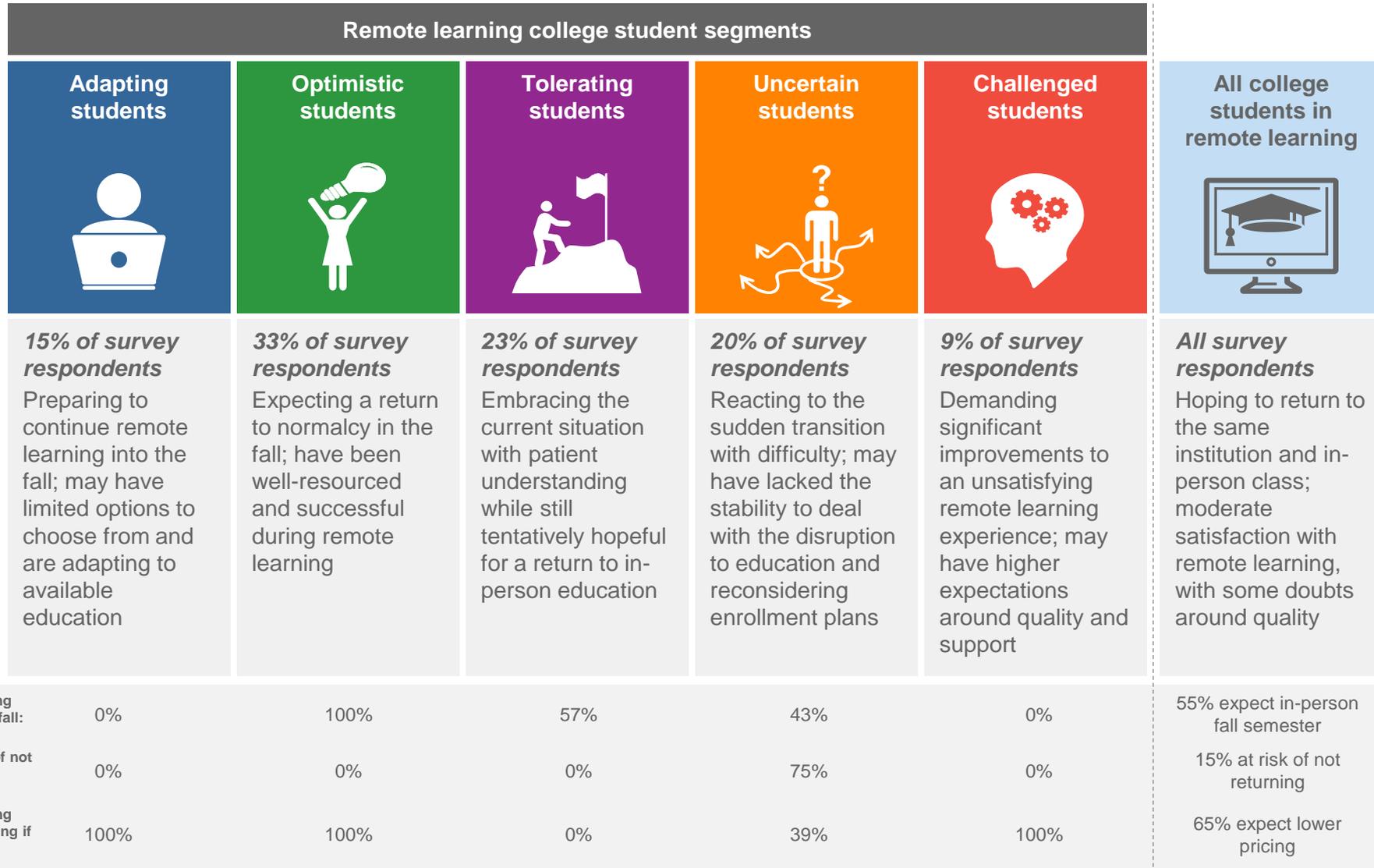
Two-year private

Agenda

- ▶ Satisfaction with remote learning
- ▶ Expectations for fall term and pricing
- ▶ **Student segmentation**

Student segmentation

Five student segments emerged, based on differing attitudinal factors toward remote learning and expectations for the fall semester



Student segmentation

Student segments differ in their satisfaction levels across key components of remote learning

Overview of satisfaction with remote learning components, Undergraduate students in remote learning (n=3,675)



Student segments	Description
Adapting students (15%)	Satisfied with class dynamics and maintaining an overall positive outlook on remote learning experience
Optimistic students (33%)	Unchallenged by remote learning technology or difficulty, but disappointed with quality of hands-on classes
Tolerating students (23%)	Moderately satisfied and patient with remote classes, with no major positives or complaints
Uncertain students (20%)	Hindered by difficulties with grading and technology, particularly around platforms for continuing extracurriculars
Challenged students (9%)	Deeply unsatisfied with quality of remote learning education and demand much greater support in health services

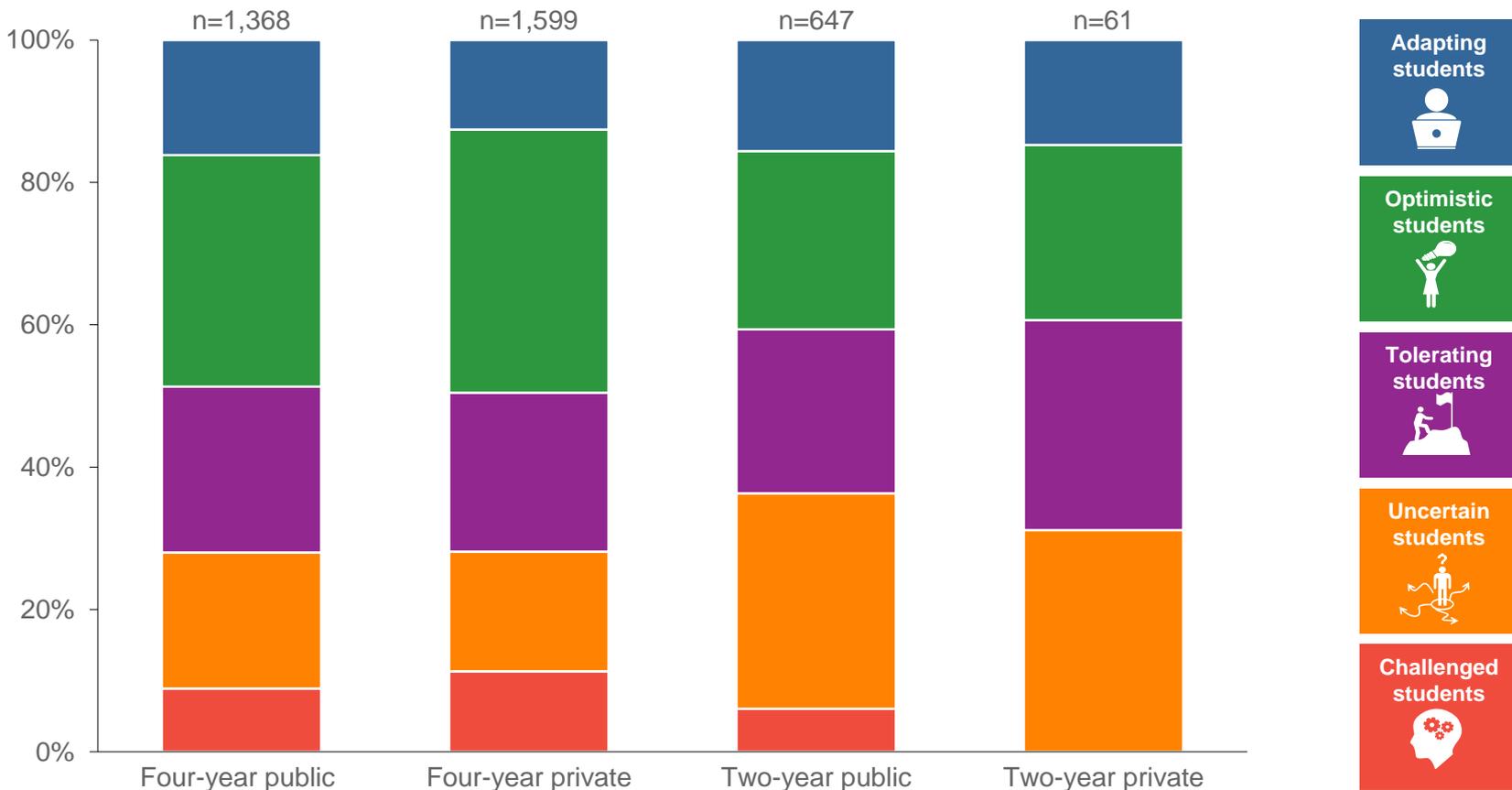
Note: Clustering analysis performed on normalized data from the remote learning student survey to understand respondents' relative attitudes toward their remote learning experiences. Data was normalized based on z-scores associated with each respondent's satisfaction ratings along key remote learning components.

Source: EY-Parthenon remote learning student survey (April 2020) and EY-Parthenon analysis

Student segmentation

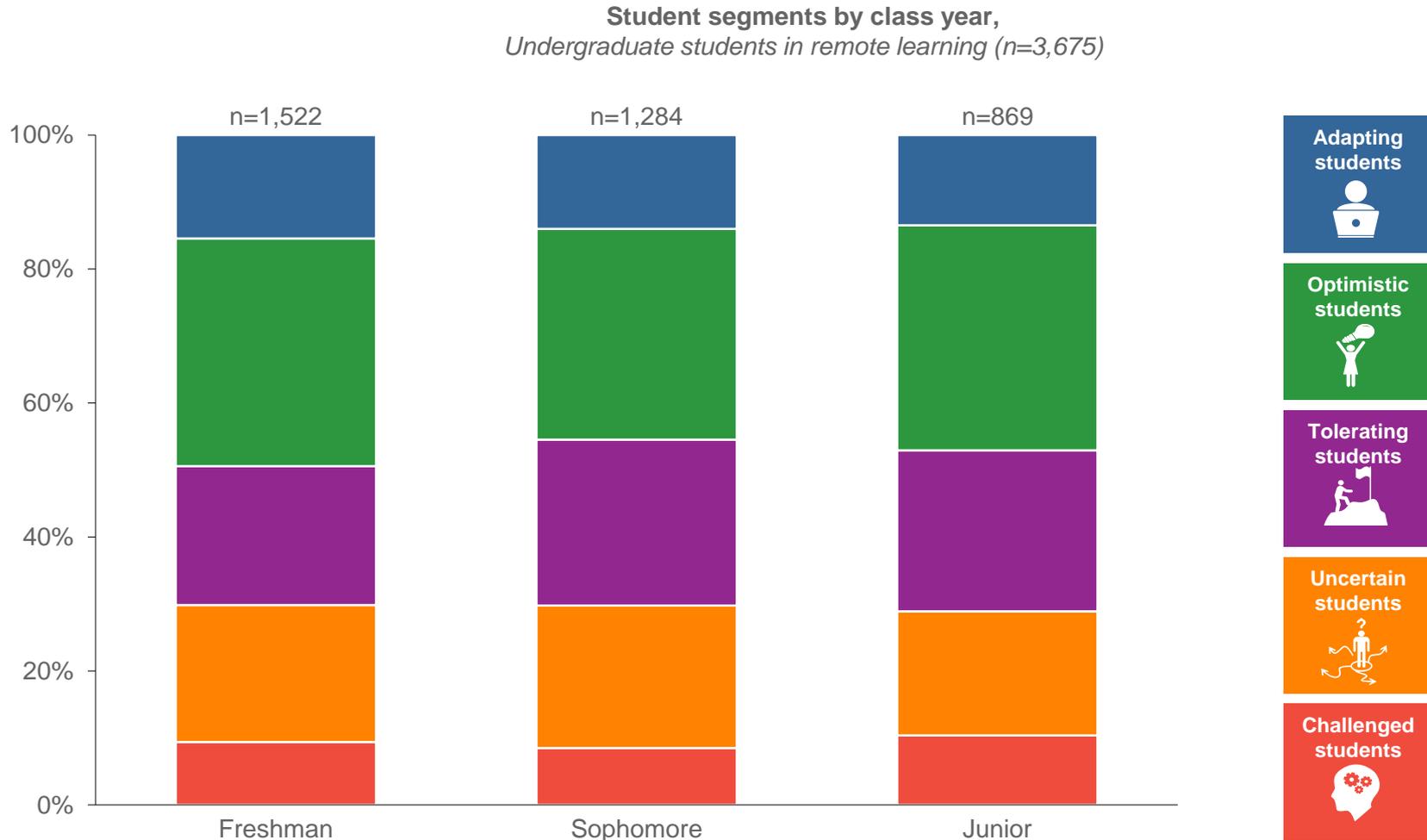
While attitudinal segments are more prominent in some institution types, they are present everywhere

Student segments by institution type,
Undergraduate students in remote learning (n=3,675)



Student segmentation

Student segments appear to be similarly distributed across class years, suggesting that any improvements or communication can be targeted to a specific segment (across years) rather than a specific class year



Student segmentation: segment profiles

Adapting students have accepted their institution's use of remote learning and hope for continued support around technology and cost management

Adapting students



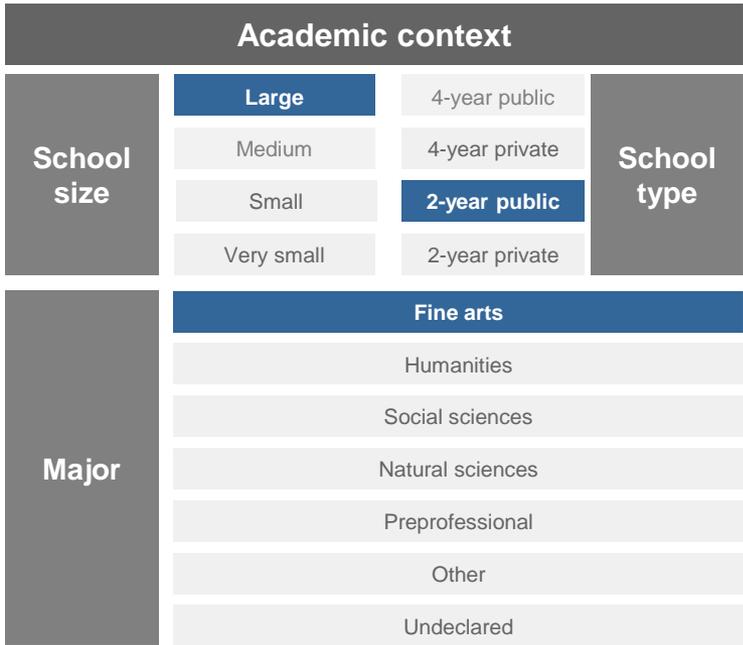

Implications for universities

Student perspective

- ▶ Express a highly positive attitude toward remote learning and are prepared to continue with it in the fall
- ▶ May be less resourced than other segments, have different expectations and are making the best of their educational opportunity

15% of survey respondents

- ▶ 100% anticipate a **remote** fall semester
- ▶ 100% plan to **return** to their school
- ▶ 100% expect their school to have **lowered pricing** in the fall



Communication needs

- ▶ May appreciate institutional transparency around cost expectations for future semesters
- ▶ Have so far been supportive of their institution's implementation of remote learning

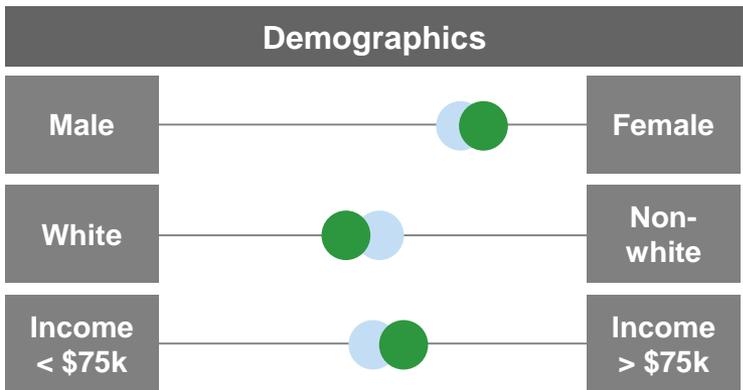
Programmatic considerations

- ▶ Remain satisfied with current classroom dynamics, including in traditionally hands-on classes
- ▶ Are likely interested in continued access to platforms for extracurriculars

Note: Segment profiles based on comparison of clusters' survey responses and represent survey respondent averages across statistically significant criteria. Academic context displays the most overrepresented characteristics relative to other segments. Sizes are based on official Carnegie Classification system for colleges and universities. "Other" majors are non-preprofessional and may include interdisciplinary majors, e.g., environmental studies. Source: EY-Parthenon remote learning student survey (April 2020), Carnegie Classification of Institutions of Higher Education by Indiana University for Postsecondary Research EY-Parthenon | Page 20

Student segmentation: segment profiles

Optimistic students have fared well in remote learning, but may require further communication around managing expectations for the fall



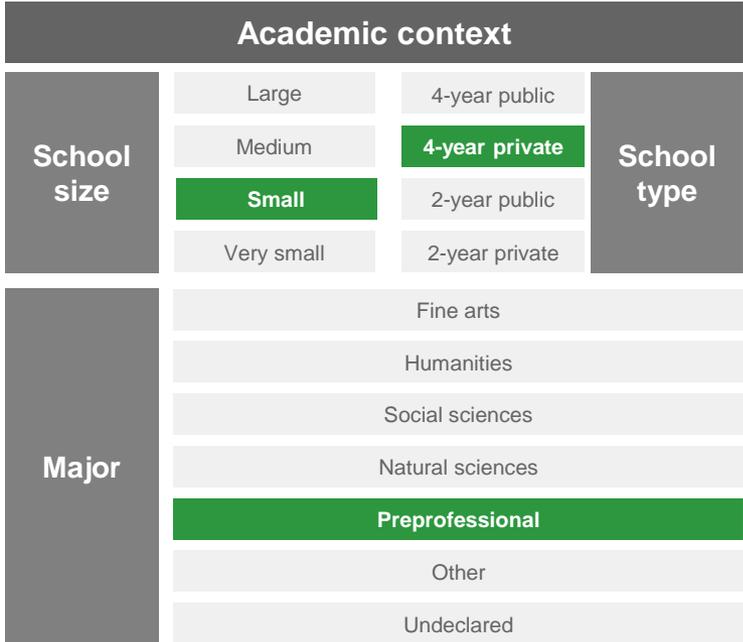
Implications for universities

Student perspective

- ▶ Expect a return to normalcy and a continued positive college experience
- ▶ May be better-resourced than other segments and do not find remote learning technically difficult
- ▶ Maintain standards for educational quality that labs have failed to meet

33% of survey respondents

- ▶ 100% anticipate an **in-person** fall semester
- ▶ 100% plan to **return** to their school
- ▶ 100% expect their school to have **lowered pricing** in the fall if remote learning persists



Communication needs

- ▶ May benefit from ongoing institutional messaging on the possibility of a remote fall semester
- ▶ Are comfortable socializing virtually and may feel supported by online events if remote learning persists

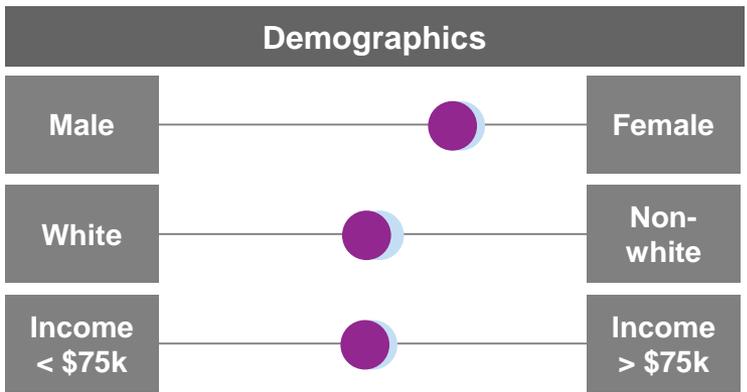
Programmatic considerations

- ▶ Represent the positive attitudinal effects of adjusted grading policies, as nearly 80% have pass/fail options
- ▶ May benefit from simulations or remote control labs to improve class quality

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Student segmentation: segment profiles

Tolerating students have withstood remote learning and are hopeful for a return to normalcy, but prepared to adapt to their institution's needs



Implications for universities

Student perspective

- ▶ Hope for school to return to in-person delivery despite high uncertainty, but resolved to return regardless
- ▶ Do not expect their school to reduce costs in the event of fall remote learning, unlike all other segments
- ▶ Represent average survey respondent demographics

Communication needs

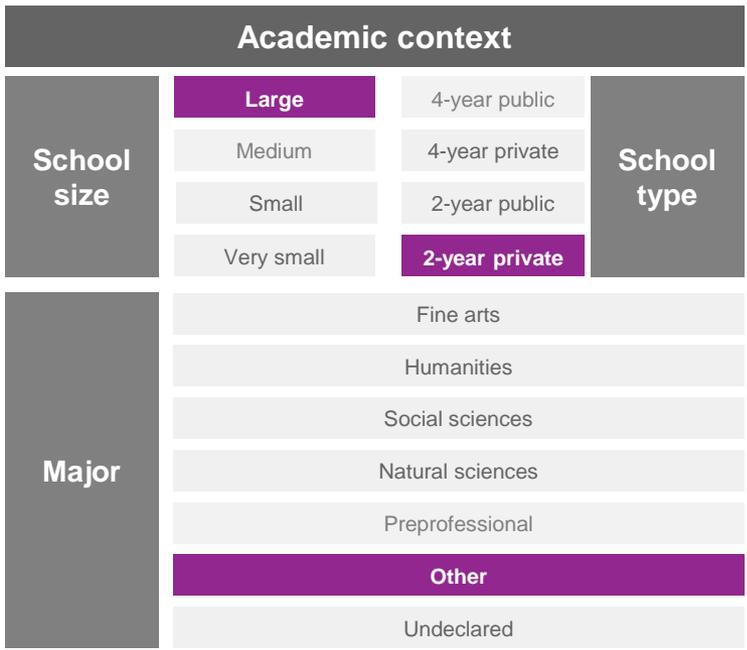
- ▶ Feel generally supported, but may feel most connected with live event calendars and other school efforts

Programmatic considerations

- ▶ Tend to be satisfied with school's grading policy (over a quarter of these students do not have a pass/fail option)
- ▶ May be better able to approximate their on-campus experience through virtual clubs and synchronous classes

23% of survey respondents

- ▶ 57% anticipate an **in-person** fall semester, while 27% expect **remote**
- ▶ 100% plan to **return** to their school
- ▶ 100% expect their school to have the **same pricing** in the fall regardless of delivery



Note: Segment profiles based on comparison of clusters' survey responses and represent survey respondent averages across statistically significant criteria. Academic context displays the most overrepresented characteristics relative to other segments. Sizes are based on official Carnegie Classification system for colleges and universities. "Other" majors are non-preprofessional and may include interdisciplinary majors, e.g., environmental studies. Source: EY-Parthenon remote learning student survey (April 2020), Carnegie Classification of Institutions of Higher Education by Indiana University for Postsecondary Research

Student segmentation: segment profiles

Uncertain students have been blindsided by the transition to remote learning and require guidance on technology as well as greater institutional transparency

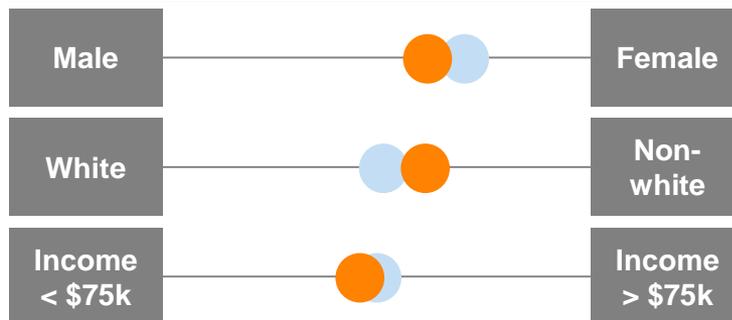
Uncertain students



20% of survey respondents

- ▶ 43% anticipate an **in-person** fall semester, while 40% expect **remote**
- ▶ 46% are **undecided** on returning, 29% do not plan to, and 25% plan to return
- ▶ 39% expect their school to have **lowered pricing**, while 35% expect **higher pricing**

Demographics



Implications for universities

Student perspective

- ▶ May have had less stable learning environment and are disillusioned with the idea of fall semester enrollment
- ▶ Appreciate quality of education, but have struggled to adapt to technology

Communication needs

- ▶ Require urgent communication from their institution on its plans for fall semester delivery and expected pricing
- ▶ Need additional support on technology use and access, particularly regarding access to platforms for extracurriculars

Programmatic considerations

- ▶ Will benefit from straightforward platforms and less technology-demanding assignments
- ▶ Are likely to prefer pass-fail options or other evaluation adjustments, as well as flexible schedules to allow more room for personal organization

Academic context

School size	Large	4-year public	School Type
	Medium	4-year private	
	Small	2-year public	
	Very small	2-year private	
Major	Fine arts		
	Humanities		
	Social sciences		
	Natural sciences		
	Preprofessional		
	Other		
	Undeclared		

Note: Segment profiles based on comparison of clusters' survey responses and represent survey respondent averages across statistically significant criteria.

Academic context displays the most overrepresented characteristics relative to other segments. Sizes are based on official Carnegie Classification system for colleges and universities. "Other" majors are non-preprofessional and may include interdisciplinary majors, e.g., environmental studies.

Source: EY-Parthenon remote learning student survey (April 2020), Carnegie Classification of Institutions of Higher Education by Indiana University for Postsecondary Research

Student segmentation: segment profiles

Challenged students are dissatisfied with their disrupted college experience and feel a need for additional attention from their institution

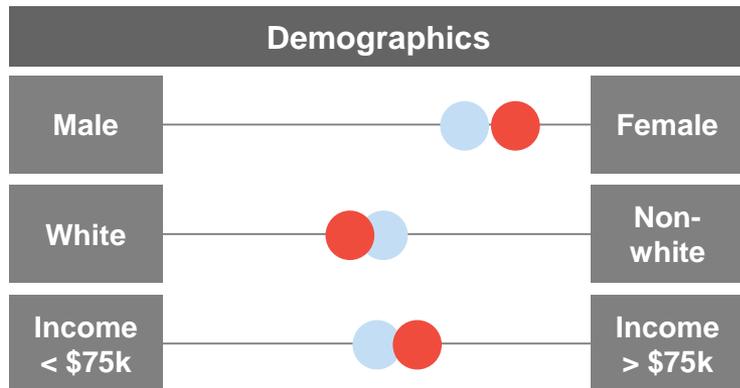
Challenged students



9% of survey respondents

- ▶ 100% are **unsure** how their fall semester will be delivered
- ▶ 100% plan to **return** to their school
- ▶ 100% expect their school to have **lowered pricing** in the fall if remote learning persists

Demographics



Implications for universities

Student perspective

- ▶ Report significant disappointment with the quality of remote learning, potentially due to higher expectations for their college experience
- ▶ Are well-resourced and most likely to receive merit-based aid
- ▶ Have had more difficulty than peers accessing health services

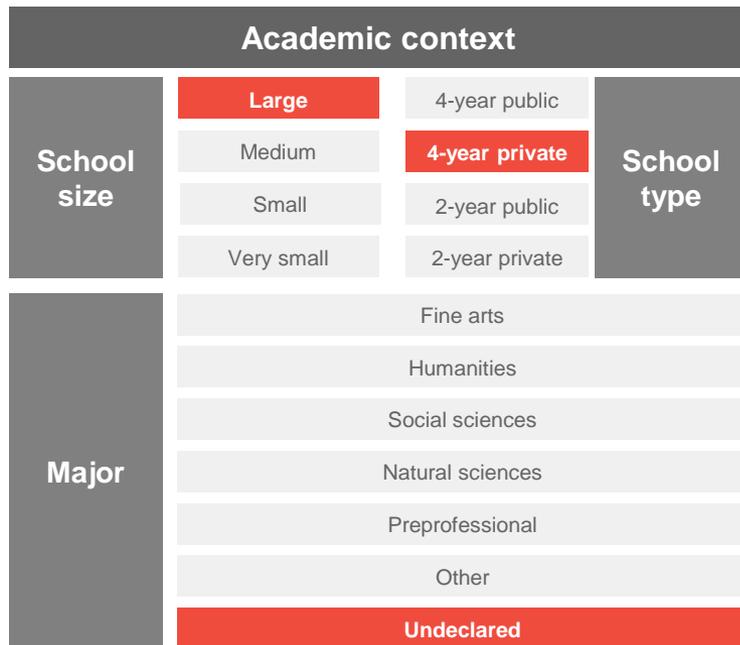
Communication needs

- ▶ May need further messaging from institution emphasizing the administration's efforts to support students and updates on existing school resources and safety measures

Programmatic considerations

- ▶ Are unhappy with virtual class teams, but satisfied with extracurriculars
- ▶ May appreciate incorporation of successful elements of social technology into virtual small group/labs

Academic context



Note: Segment profiles based on comparison of clusters' survey responses and represent survey respondent averages across statistically significant criteria.

Academic context displays the most overrepresented characteristics relative to other segments. Sizes are based on official Carnegie Classification system for colleges and universities. "Other" majors are non-preprofessional and may include interdisciplinary majors, e.g., environmental studies.

Source: EY-Parthenon remote learning student survey (April 2020), Carnegie Classification of Institutions of Higher Education by Indiana University for Postsecondary Research

Authors and contributors



Robert Lytle

Global Head of Education
EY-Parthenon, Ernst & Young LLP
+1 617 478 7096
robert.lytle.@parthenon.ey.com



Kasia Lundy

Principal
EY-Parthenon, Ernst & Young LLP
+1 617 478 6328
kasia.lundy@parthenon.ey.com



Seth Reynolds

Principal
EY-Parthenon, Ernst & Young LLP
+1 617 478 4607
seth.reynolds@parthenon.ey.com



Haven Ladd

Principal
EY-Parthenon, Ernst & Young LLP
+1 617 478 7055
haven.ladd@parthenon.ey.com

Contributors

Jourdan Sutton

Vice President
EY-Parthenon, Ernst & Young LLP
+1 415 486 3652
jourdan.sutton1@parthenon.ey.com

Miriam El-Baz

Associate
EY-Parthenon, Ernst & Young LLP
+1 617 478 7055
miriam.el-baz@parthenon.ey.com

Courtenay Selden

Consultant
EY-Parthenon, Ernst & Young LLP
+1 212 773 3000
courtenay.selden@parthenon.ey.com

Marcone Correia

Associate
EY-Parthenon, Ernst & Young LLP
+1 617 478 4607
marcone.d.correia@parthenon.ey.com

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