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PSE | COVID-19 IMPACT STUDY – PROSPECTS, CURRENT STUDENTS AND PARENTS

FINAL REPORT OF FINDINGS
May, 2020

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ABOUT THE RESEARCH

BACKGROUND

- The COVID-19 pandemic is requiring universities to make swift and radical changes. As institutions deal with the hour-by-hour demands of this evolving situation for **current students**, they must also prepare for the impact of COVID-19 on **prospective students** who are awaiting or who have received offers of admission for September 2020.
- With this in mind, The Strategic Counsel conducted a online study of students and their parents to understand:
 - The extent to which students have changed their enrolment plants
 - Factors shaping students' decisions about a whether to start, or to continue, their studies
 - Concerns that students have about the upcoming year
 - Actions universities can take to maximize the likelihood that prospective students will still attend in Fall 2020

METHODOLOGY

- A total of **n=2,799** respondents completed the survey online. Respondents were drawn from an online panel. The sample includes the following groups:
 - Prospective university students who are currently in high school (i.e., DIRECT ENTRY) (n=593)
 - Prospective university students who are currently not in high school (i.e., NON-DIRECT ENTRY) (n=601)
 - Current university students who will not graduate in June 2020 (n=801)
 - Parents of grade 12 students who intend to start university in September 2020 (n=403)
 - Parents of current university students who will not graduate in June 2020 (n=401)
- The survey was undertaken between April 17 and April 28, 2020.
- Student data is weighted by region and gender; parent data is weighted by region.

2

KEY FINDINGS



Key Findings

1

LIKELIHOOD OF ATTENDING UNIVERSITY IN SEPT'20

Most incoming and returning students intend to register in September. However, significant numbers of prospects, in particular, are at risk of deferring for at least a semester.

- 'At risk' prospects and current students are defined as those who agree strongly ('high risk') or somewhat ('moderate risk') that they are likely to take the year off. Levels of agreement are as follows:
 - Prospects, direct-entry: 29% (11% strongly, 16% somewhat)
 - Prospects, non-direct entry: 39% (16% strongly, 23% somewhat)
 - Current students: 16% (4% strongly, 12% somewhat)
- The findings for parents generally mirror those of prospects and current students.



Key Findings

2 PROFILE OF PROSPECTS AND CURRENT STUDENTS AT RISK

Prospects and current students most at risk of not enroling in September tend to have lower household incomes, poorer internet access, and are more likely to have a disability.

- While concerns about health and safety are clearly on the minds of most students and parents, those most at risk of not enroling are feeling the financial impact of COVID-19 more acutely than others.
- Concern about financing the upcoming year accounts for at least some of the difference between direct- and non-direct entry prospects in likelihood of taking the year off. As a group, non-direct entry prospects have lower household incomes and are more likely to indicate that their ability to finance their education has changed as a result of COVID-19.
- Universities able to provide students with financial and related supports may be able to reduce the number of deferrals (e.g., identify and help students with poor internet access at home). At minimum, it is important to avoid placing any additional financial burdens on students (e.g., by requiring them to purchase hardware or software for online courses).
- By program area, prospects and current students in the Arts are somewhat more at risk of taking the year off than those studying in other areas.



Key Findings

3 KEY CONCERNS

Universities need respond to all three major areas of concern: health and safety, affordability, and quality of online courses.

- No area of concern fully trumps the others. Most students and parents are anxious about both a return to campus for in-person classes, and a fall term that might take place entirely online.
- Those who are most concerned about the upcoming year are more likely to:
 - Be experiencing financial impacts
 - Be nervous about COVID-19 on campus
 - Anticipate that disruptions will last for quite awhile
 - Be unwilling to register if all courses are online
 - Have poor internet access at home
 - Be re-thinking plans to live away from home



Key Findings

4 ADDRESSING CONCERNS ABOUT ONLINE LEARNING

Most prospects and students have experience with online courses, and are reasonably satisfied with the formats. However, they want in-person learning options next year.

- While prospects and students are generally open to online formats, almost all believe the quality is not as good as in-person classes. And, despite concerns about the potential for COVID-19 on campus, most students want a return to in-person classes as soon as it is considered safe. Because of this, they are significantly more likely to indicate that they are willing to enrol in September if classes start online but switch to in-person, than if classes are online only for the entire semester.
- Prospects and students, especially those at risk of not enroling, are also responsive to formats that:
 - Offer a combination of online for large classes and in-person for smaller classes;
 - Provide more support and interaction through:
 - Ability to ask questions of professors during online classes
 - More TAs
 - Ability to collaborate with peers
- The hallmarks of a good online learning experience are: flexibility, interactivity, and access to instructors.



Key Findings

5 PROVIDING OTHER ONLINE SUPPORTS

Given likely increases in stress levels for new and returning students, mental health issues may be well above typical levels.

- Both prospects and students, especially those at risk of not enrolling, identify online mental health resources as an important support.
- Further, communicating about and making emergency in-person mental health resources available (adhering to social distancing guidelines) may also help.



Key Findings

COMMUNICATIONS

In terms of communications, the most important message to convey is that all actions are designed to safeguard the health of students, and that universities are committed to this.

- This means communicating that universities will be working closely with, and following the advice of, public health officials.
- It also means that universities should communicate that they have clear plans (and even describe plans for opening campuses), but that timing is dependent upon public health guidelines.
- Messages from university presidents, while important, are less persuasive than messages from public health officials, and should therefore be closely aligned with public health directives.

3

EXPECTATIONS FOR SEPTEMBER 2020

Section Highlights

Most students and parents anticipate that at least some classes will be held in person in September.

Most are also concerned about this possibility.

Managing Expectations for September, 2020

- Overall, expectations about how much longer COVID-19 related disruptions will continue are unrealistic. Most anticipate disruptions to end in the next 3 months or sooner, implying that they expect September, 2020 to be close to 'business as usual' for universities.
- Further, most anticipate that at least some classes will be held in person (and most are also at least somewhat concerned about this possibility). In other words, all groups expect, but are also quite cautious about, a return to 'normalcy.'
- Although majorities of all groups are concerned about coming to campus in September, parents of prospects are the most strongly concerned (3-in-10 are 'very' concerned and almost three-quarters are at least somewhat concerned), indicating that they will require the most reassurance.

EXPECTED LENGTH OF COVID-19 DISRUPTIONS AT UNIVERSITIES

Many hold unrealistic expectations about how long COVID-19 disruptions will continue, in that a majority expect it to be for another 3 months or less. This implies that many students and parents hope or expect September 2020 to be 'business as usual' for universities.



There are no notable differences in attitudes by province or other key demographic variables.

QD3 (Students)
QD3 (Parents)
Base:
Total sample

For how long do you expect the COVID-19 related disruptions to classes at universities to continue?
For how long do you expect the COVID-19 related disruptions to classes at universities to continue?
Total sample

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EXPECTATIONS FOR COURSE DELIVERY IN SEPTEMBER 2020

There is no consensus about how COVID-19 will or will not affect course delivery. However, most anticipate that at least some classes will be held in person (indicating a need for universities to closely monitor -- and manage -- expectations).



Parents – especially of current students – most commonly believe that there will be a mix of in-person and online courses.

Prospects direct from high school and current students are the most hopeful that everything will be ‘back to normal’.

QD4 (Students)
QD4 (Parents)
Base:
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Thinking about September 2020, which of the following best describes what you expect will happen at the university where you plan to study?
Thinking about September 2020, which of the following best describes what you expect will happen at the university where your child plans to study?
Total sample (responses for those who gave an ‘other’ response: 1%-2% of cases)

CONCERN ABOUT GOING TO CAMPUS FOR IN-PERSON CLASSES IN SEPTEMBER

Most prospects, current students and parents are concerned about coming to campus for in-person classes in September.



Parents of prospects express the strongest concern (3-in-10 are 'very' concerned).

Direct prospects and current students are least likely to be concerned.

Prospects/students with disabilities are more likely than others to be concerned.

Levels of concern do not vary significantly by province or by other key demographic variables.

QD5 (Students)
QD5 (Parents)
Base:
Total sample

How concerned, if at all, are you about coming to the university's campus for classes if they reopen for in-person classes in September?
How concerned, if at all, are you about your child going to the university's campus for classes if they reopen for in-person classes in September?

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4

LIKELIHOOD OF ENROLING IN SEPTEMBER 2020

Section Highlights

More than 1-in-10 prospects (direct and non-direct) are strongly at risk of not enroling in September, especially if universities are only able to offer online courses.

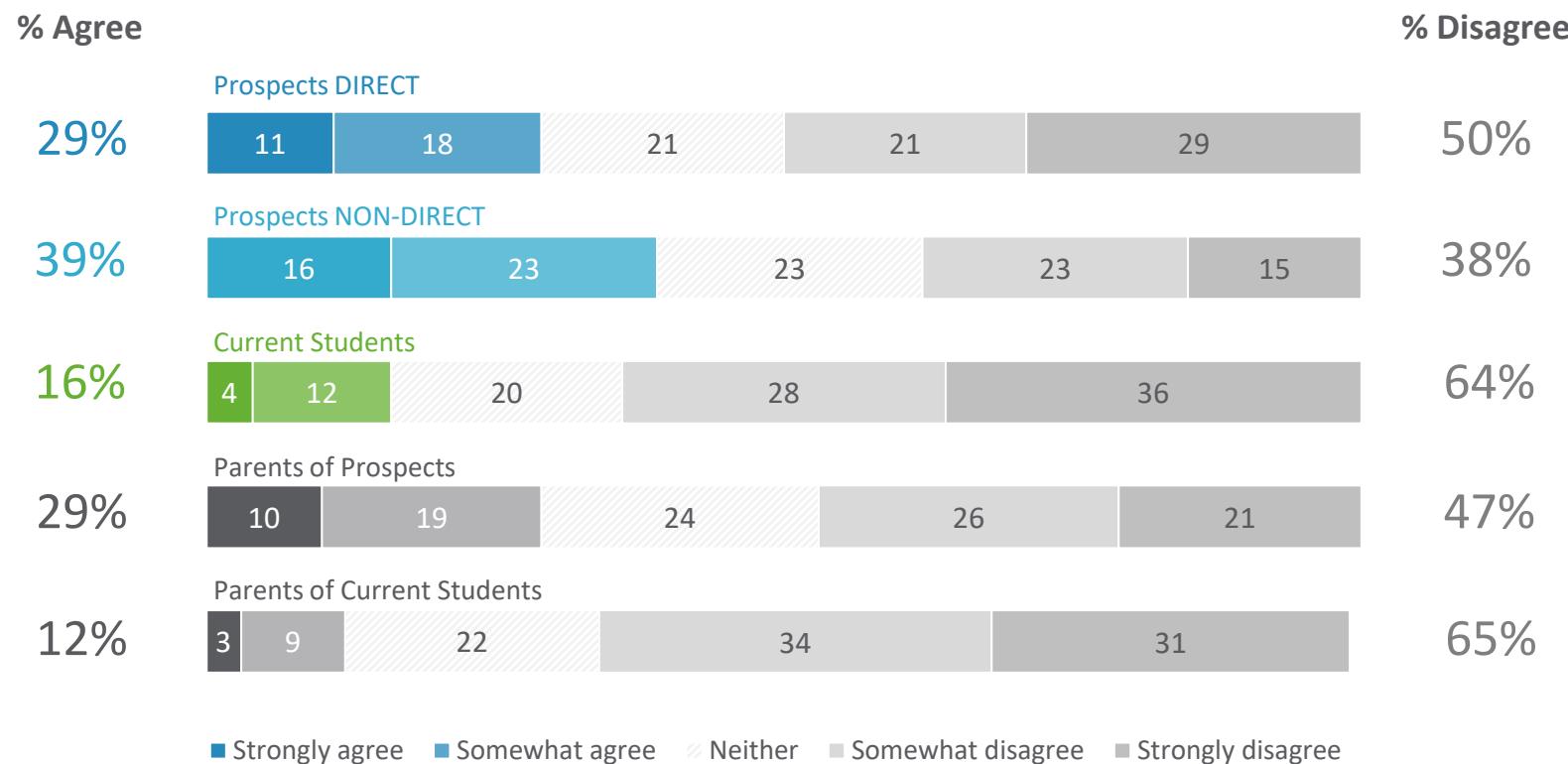
Likelihood of Enroling

- Overall, 13% of prospects who have already received an offer strongly agree that they are likely to take a year off (compared to 16% of those who have not received an offer yet).
- Non-direct prospects are most at risk of deferring, likely because of greater financial strains (their household incomes are lower, on average, than direct prospects), and more employment options.
- By comparison, current students are much less likely to be at risk of taking a year off. Only 4% strongly agree that they will.
- Section 5 contains detailed profiles for prospects, current student and parents most at risk of deferring enrolment in September, 2020.

LEVEL OF AGREEMENT ABOUT TAKING A YEAR OFF DUE TO DISRUPTION OF COVID-19

About 1-in-10 prospects direct from high school are strongly at risk of not attending in September, and about 3-in-10 are at least somewhat at risk. Non-direct prospects are more at risk, likely because they tend to have more precarious financial situations.

“Given all the disruption and uncertainty over COVID-19, I am likely to take the year off from university.”

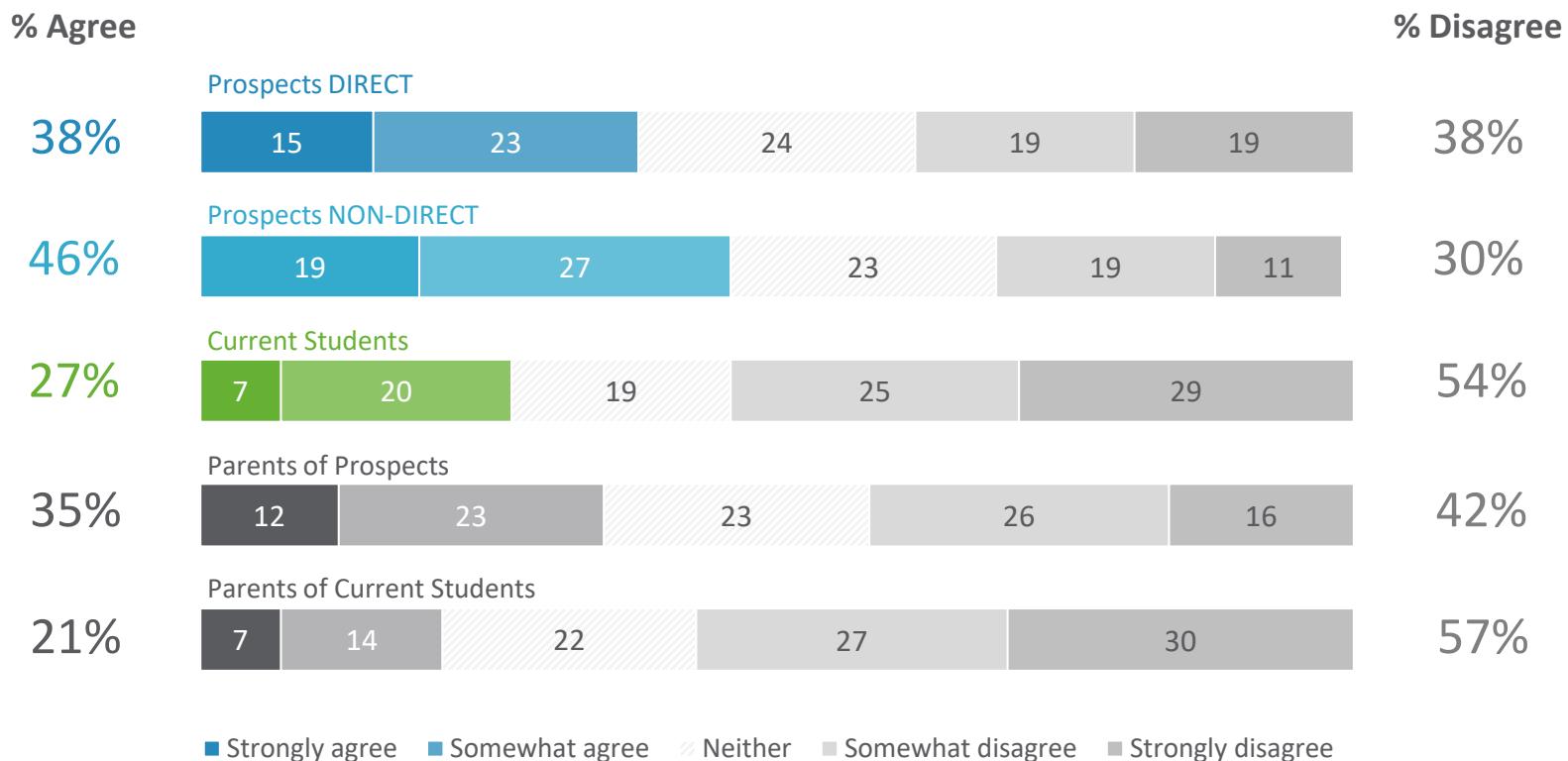


Section 5 contains detailed profiles of students most at risk of not attending in September.

LEVEL OF AGREEMENT ABOUT TAKING A TERM OFF IF UNIVERSITY OFFERS ONLY ONLINE CLASSES

Prospects (and to a lesser extent, current students) are most at risk of not enrolling if universities can only offer online classes in September.

"If my university is only offering online classes in September, (I am/my child is) likely to take at least that term off."

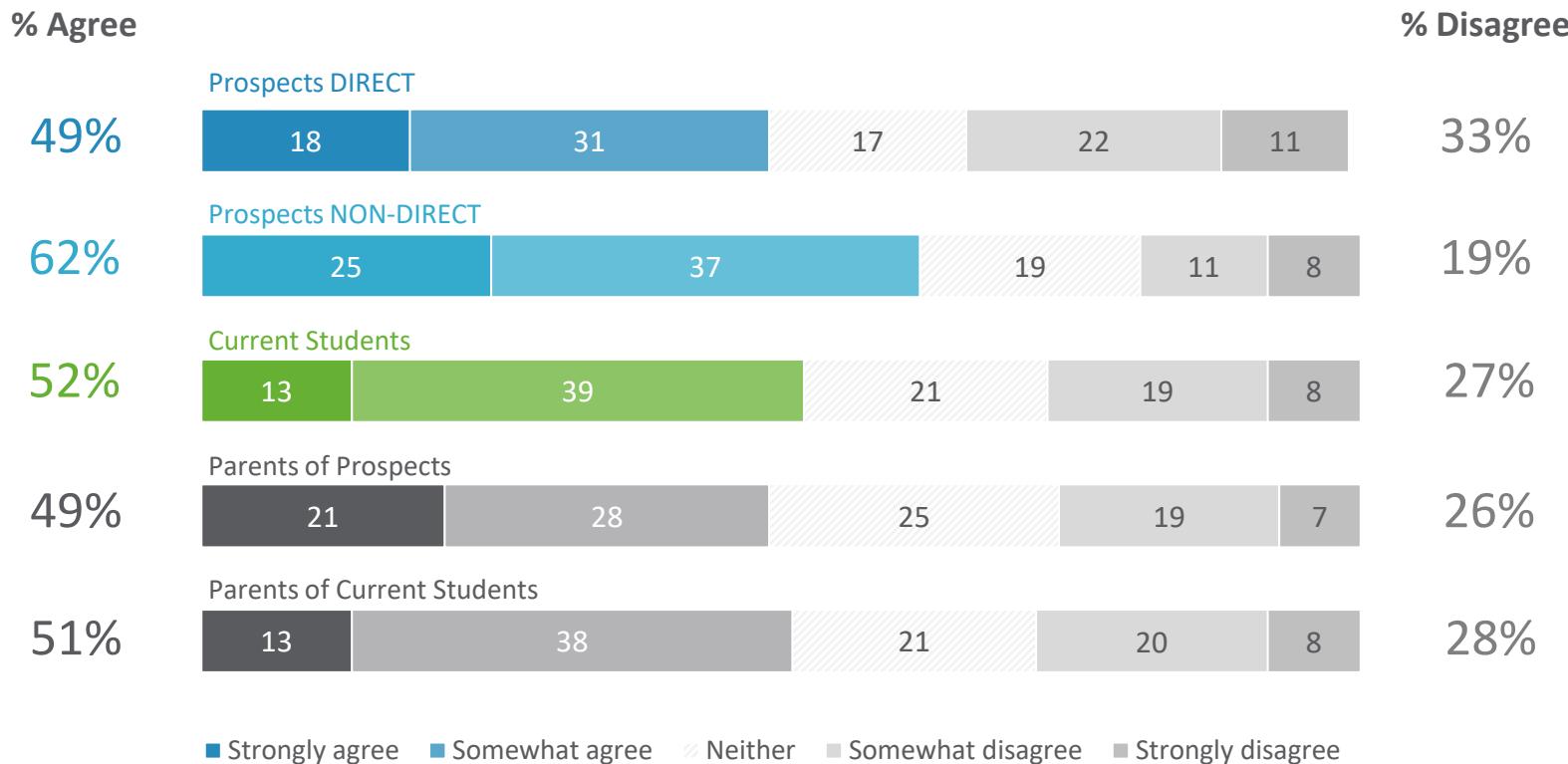


Sections 7 and 8 contain detailed findings on strategies for managing expectations re: online course delivery.

LEVEL OF AGREEMENT ABOUT BEING NERVOUS TO RESUME IN-PERSON CLASSES

Anxieties are likely to be running high when campuses reopen for in-person classes. All groups (especially non-direct prospects) will need reassurances about plans for keeping students safe.

“Even when my university is open and in-person classes resume, I will feel very nervous about attending.”



Sections 6 and 7 contain detailed findings about the concerns of prospects, students and parents, and strategies to make them feel more comfortable.

5

PROFILE OF STUDENTS AT RISK OF NOT ENROLING

Section Highlights

Those at greatest risk of not enrolling in September are more likely to have financial concerns, poor internet access, and/or a disability.

Profile of Students at Risk of Not Attending

- Affordability is a major issue for those thinking seriously about not enrolling in September. This includes not only being able to pay for tuition, but also being able to afford a transition to online learning (e.g., considerations around quality and cost of internet access at home).
- Other characteristics of prospects most at risk include whether they are/were planning to live away from home – those who have received an offer and were planning to live away from home are more likely to be considering skipping the year (due to both health and financial concerns).
- Among parents, mothers are a little more likely than fathers to be hesitant about their child enrolling.

Profile of PROSPECTS WHO HAVE RECEIVED AN OFFER, especially those hesitant about attending



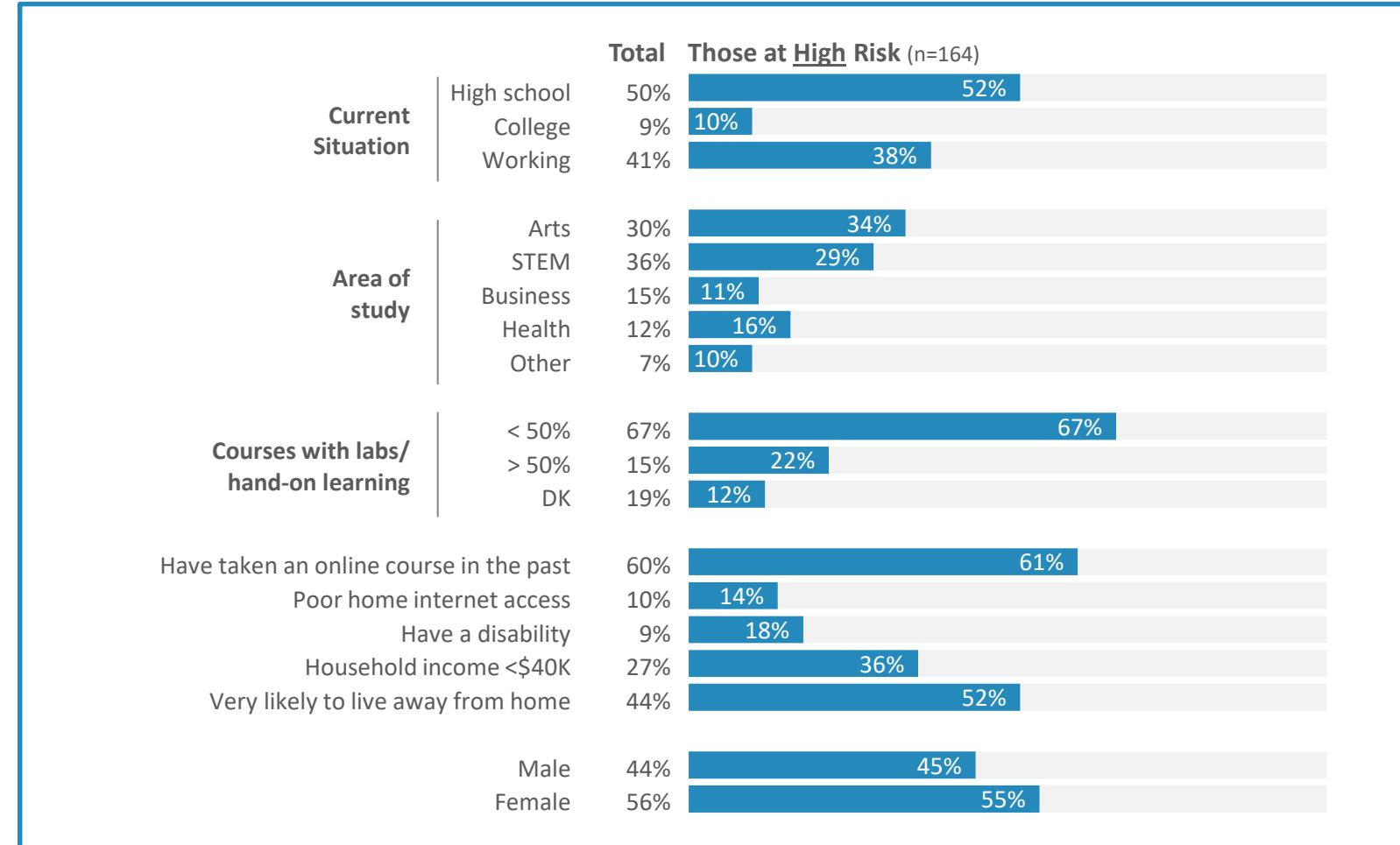
“Given all the disruption and uncertainty over COVID-19, I am likely to take the year off...”



- Agree strongly
- Agree Somewhat
- Neither
- Disagree somewhat
- Disagree strongly

Prospects who have received an offer and are at high risk of not registering in September are more likely to:

- have a disability;
- be from lower income households; and
- Prior to COVID-19, were more likely to anticipate living away from home



Profile of DIRECT-ENTRY PROSPECTS, especially those hesitant about attending



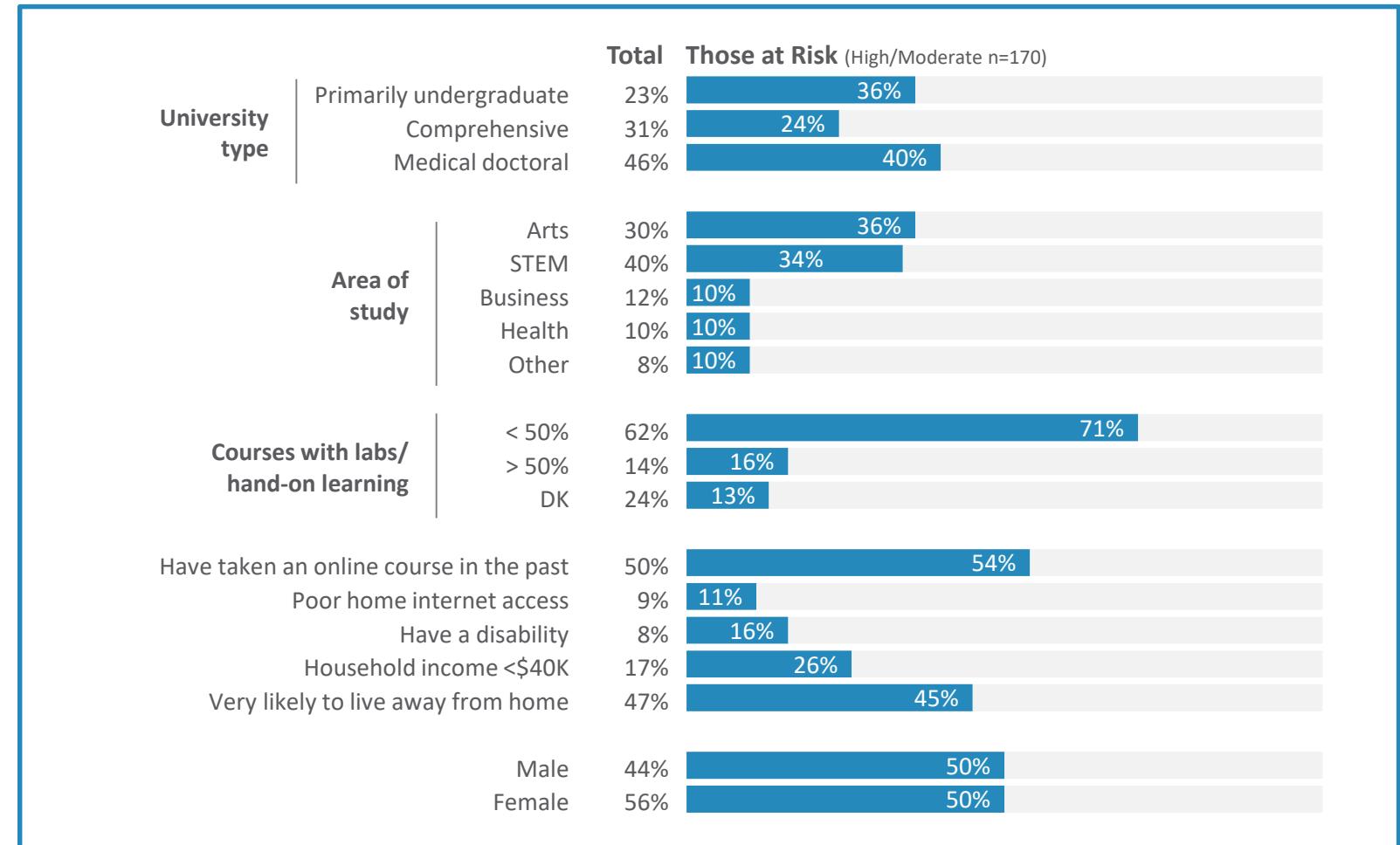
"Given all the disruption and uncertainty over COVID-19, I am likely to take the year off..."

11 18 22 21 29

- Agree strongly
- Agree Somewhat
- Neither
- Disagree somewhat
- Disagree strongly

Direct-entry prospects who are at risk of not attending are more likely to:

- have applied to a primarily undergraduate university;
- have applied to an arts program;
- have a disability;
- be from a lower income household;
- be male



Profile of NON-DIRECT ENTRY PROSPECTS, especially those hesitant about attending

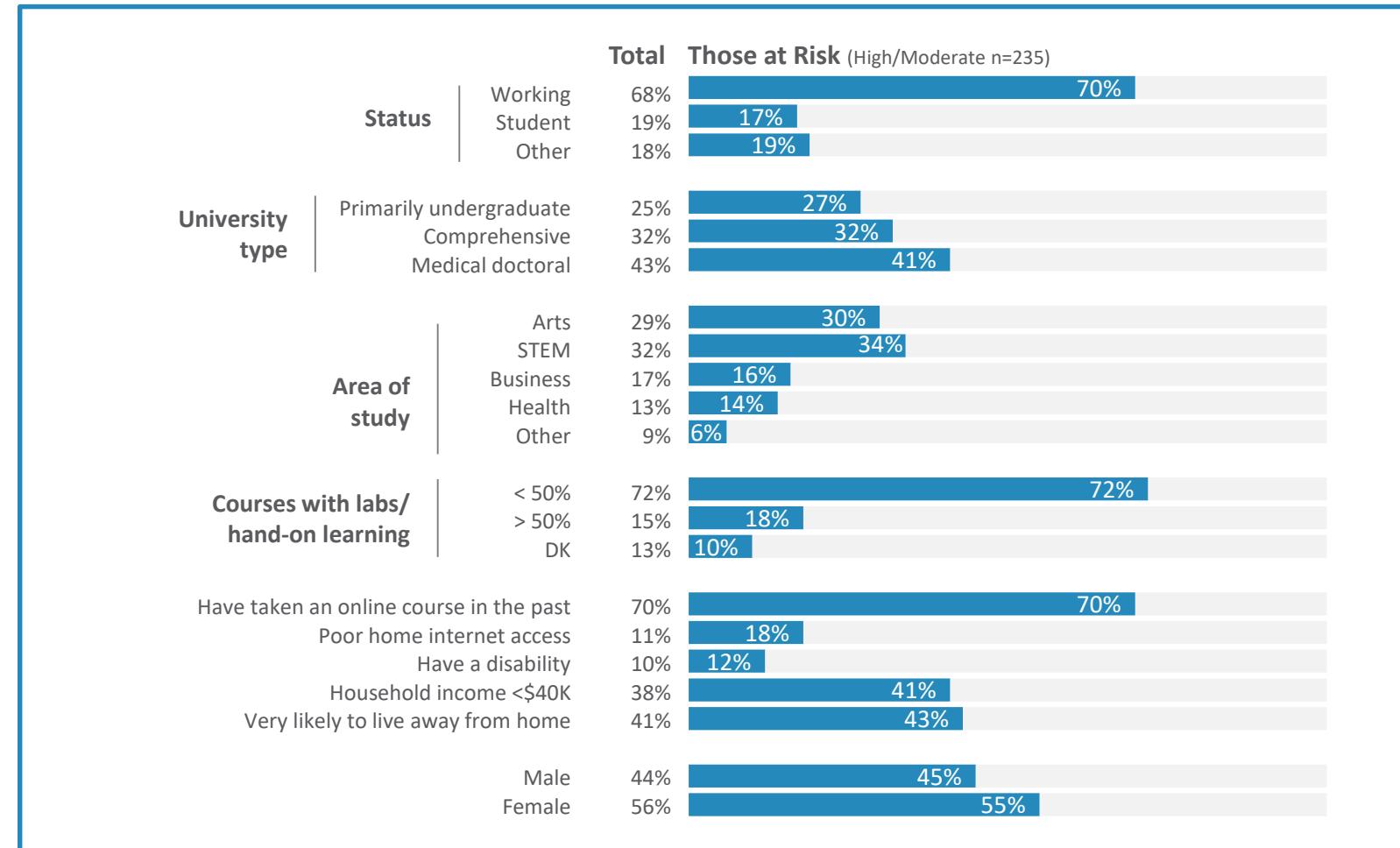


"Given all the disruption and uncertainty over COVID-19, I am likely to take the year off..."

16 23 23 23 15

- Agree strongly
- Agree Somewhat
- Neither
- Disagree somewhat
- Disagree strongly

- Non-direct prospects are much more likely than direct prospects to be at risk of not attending in September.
- Non-direct prospects generally have lower household incomes than direct prospects, suggesting that they are more likely to be living independently (and have more precarious financial situations).
- The majority are working.
- Those at most risk of not attending are more likely to have concerns about internet access.



Profile of CURRENT STUDENTS, especially those hesitant about attending



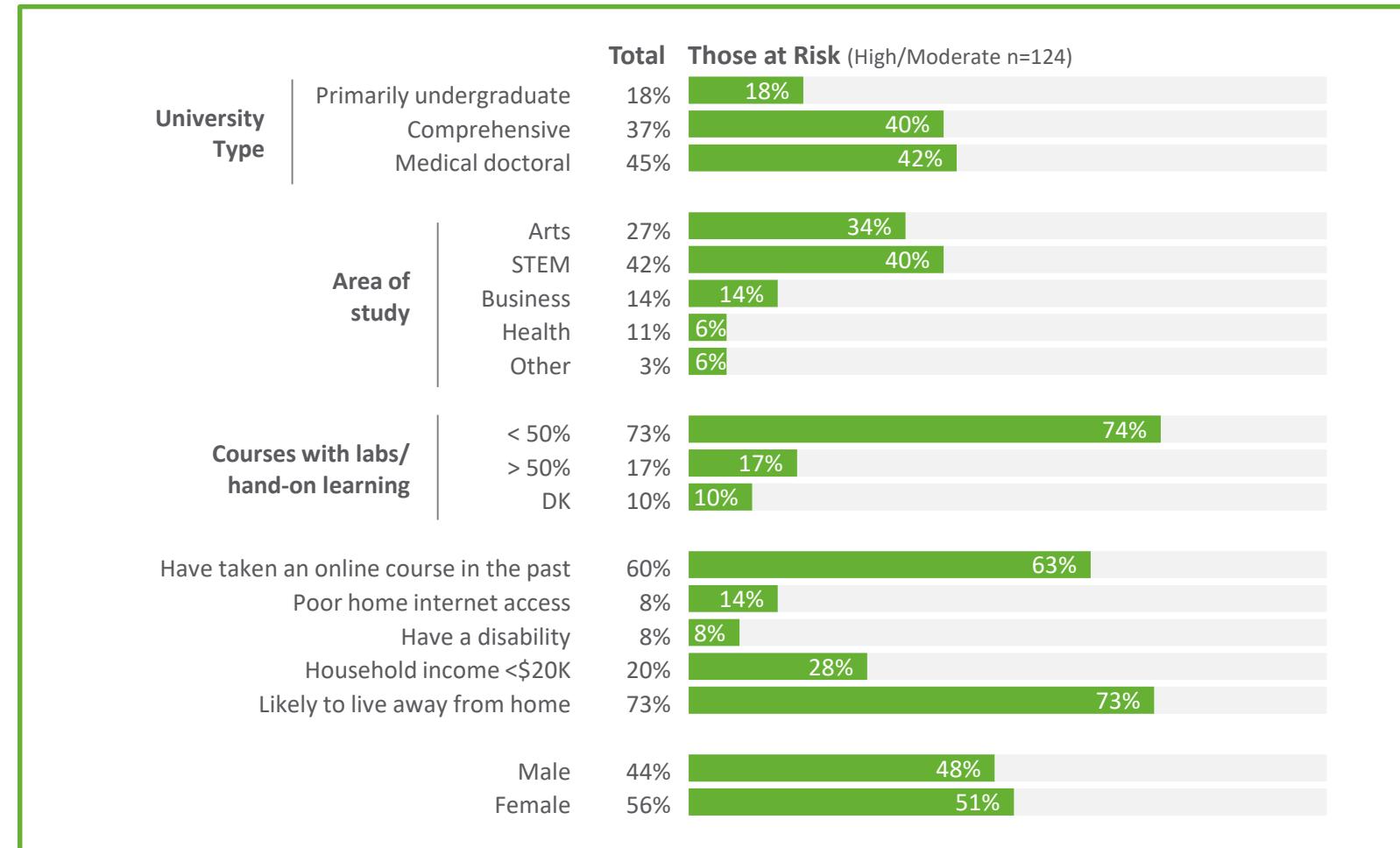
"Given all the disruption and uncertainty over COVID-19, I am likely to take the year off..."

412 21 28 36

- Agree strongly
- Agree Somewhat
- Neither
- Disagree somewhat
- Disagree strongly

Students at high/moderate risk of not registering in September are more likely to:

- be in arts-related programs
- have concerns about internet access
- have lower household incomes
- be male



Profile of PARENTS OF PROSPECTS/STUDENTS, especially with children who are hesitant about attending



"Given all the disruption and uncertainty over COVID-19, I am likely to take the year off..."

PARENTS OF STUDENTS

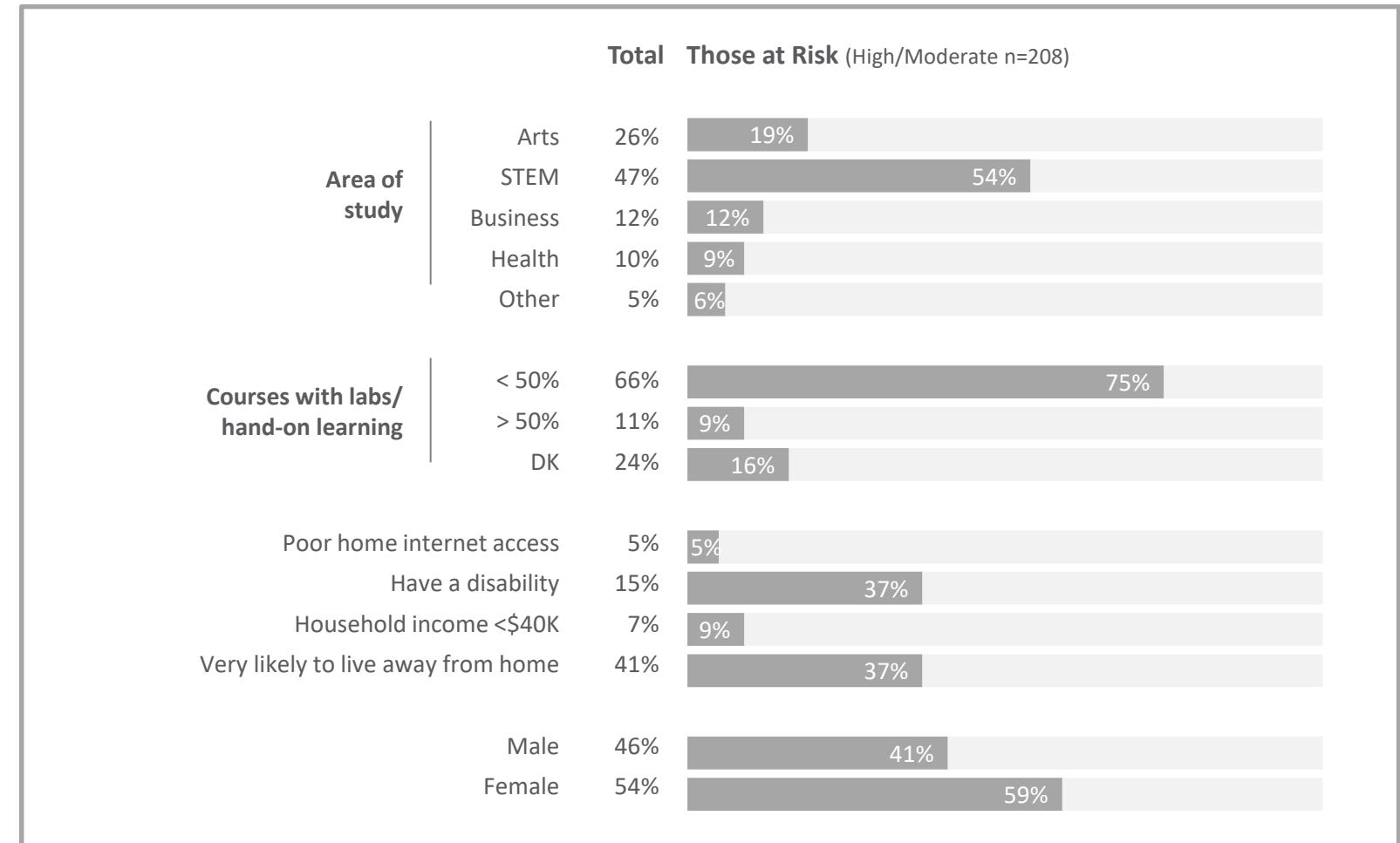


PARENTS OF PROSPECTS



- Agree strongly
- Agree Somewhat
- Neither
- Disagree somewhat
- Disagree strongly

Parents with children at risk of not attending are more likely to be mothers and to have a child with a disability.



6

KEY CONCERNS OF STUDENTS AND PARENTS

Section Highlights

About half of students and parents have increased financial pressures as a result of COVID-19.

Key Concerns of Students and Parents

- In addition to significant financial pressures, students who are most concerned about the upcoming year are more likely to:
 - Be nervous about COVID-19 on campus;
 - Anticipate that disruptions will last for quite awhile;
 - Have poor internet access at home;
 - Be re-thinking plans to live in residence/away from home; and,
 - Be taking classes that would normally include labs or other hands-on elements

CHANGE IN ABILITY TO FINANCE UNIVERSITY EDUCATION DUE TO COVID-19

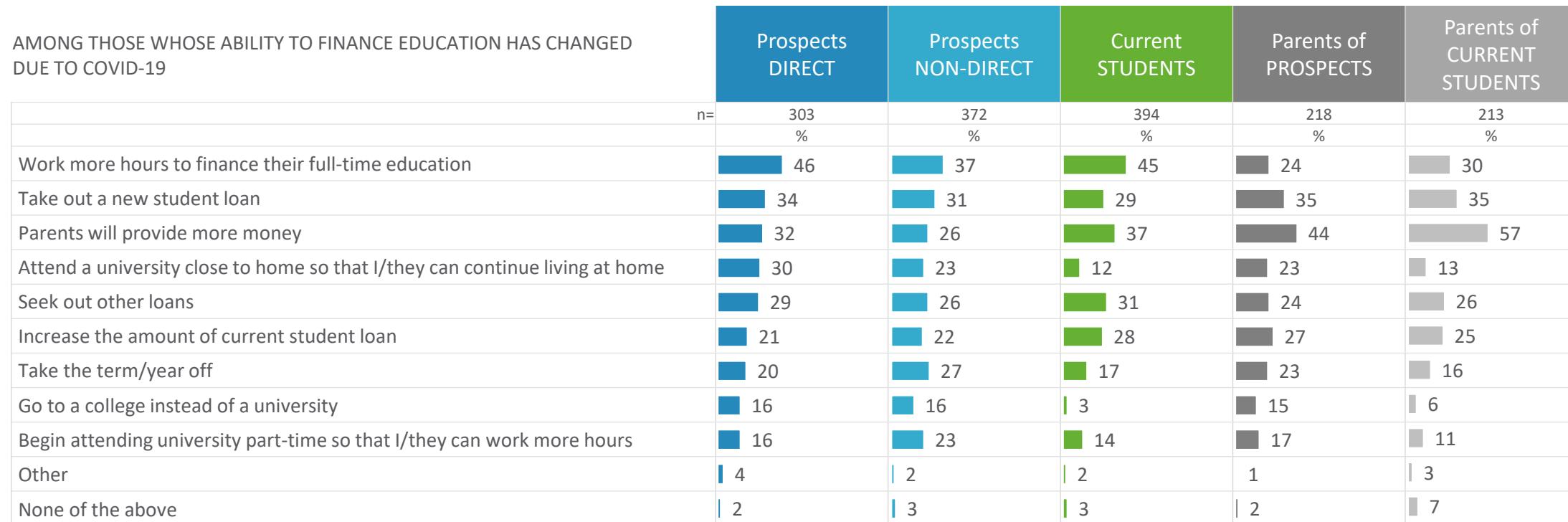
About half say that their ability to finance university education has been impacted by COVID-19. The impact is slightly stronger for non-direct prospects (who, on average, have a significantly lower household income than direct prospects).



QD11 (Students)
QD11 (Parents)
Base:
Total sample

Has your ability to finance your university education changed as a result of the COVID-19 pandemic?
Has yours and or your child's ability to finance their university education changed as a result of the COVID-19 pandemic?
Total sample

Students and parents are exploring a variety of different options to continue financing their university studies. Many students will be working more hours and taking on additional debt.



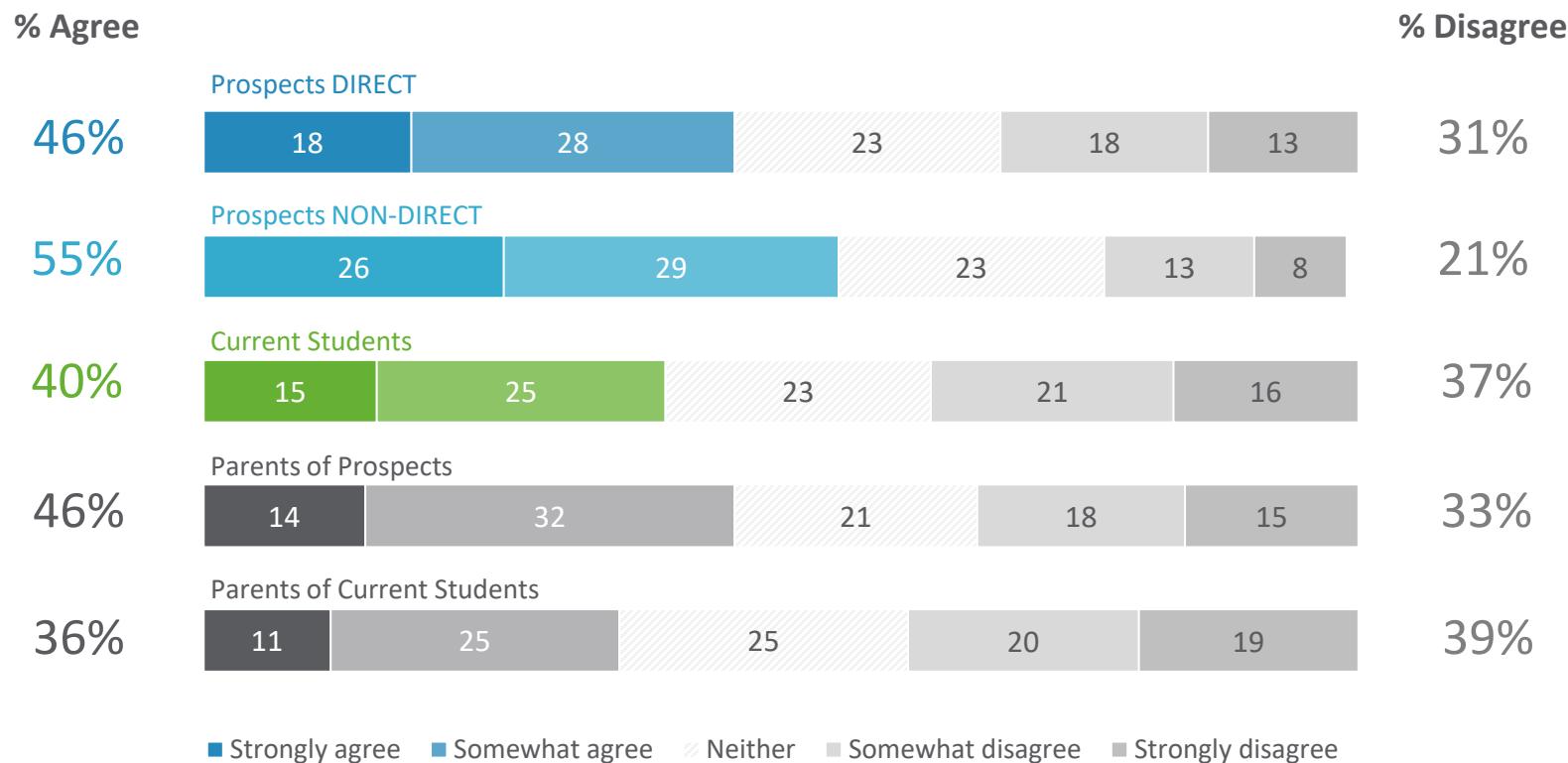
QD12 (Students)
QD12 (Parents)
Base:
Ability to finance university education has changed as a result of COVID-19 pandemic

As a result of this financial change, which of the following is likely to take place to help finance your university studies?
As a result of this financial change, which of the following is likely to take place to help finance your child's university studies?
Ability to finance university education has changed as a result of COVID-19 pandemic

LEVEL OF AGREEMENT ABOUT ABILITY TO AFFORD UNIVERSITY EDUCATION

Many believe that they will need to take on more debt than they are comfortable with.

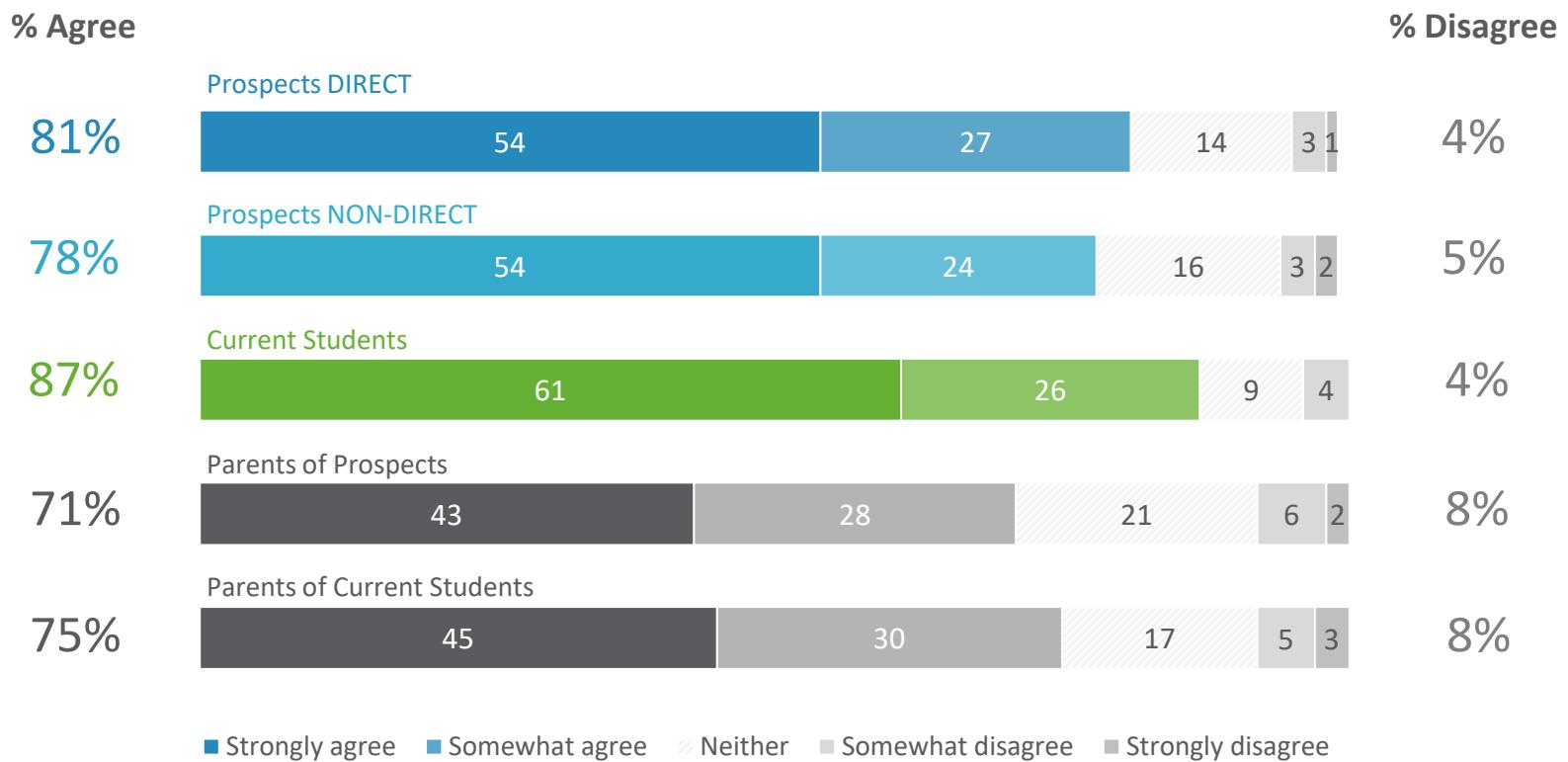
"It is quite likely that (I/my child) won't be able to afford university without taking on more debt than I am comfortable with."



LEVEL OF AGREEMENT ABOUT REDUCING TUITION FEES

Unsurprisingly, most want universities to reduce tuition fees.

“Universities should reduce their tuition fees to encourage students to enrol for the coming year.”



INTERNET ACCESS AT HOME

Prospects and current students without good internet access at home are significantly more likely to be thinking about taking next year off.



About 1-in-10 prospects/students say their internet access is not good enough to take online courses from home.

| DIRECT Prospects | NON-DIRECT Prospects | Current Students |
|------------------|----------------------|------------------|
| 9% | 11% | 8% |

Those who are more likely to have poor internet access at home include prospects/students...

- With household incomes of <\$20,000 (17%)
- With a disability (14%)



Prospects/students with poor internet access are significantly more likely than others to agree at least somewhat that, 'given all the disruptions with COVID-19', they are likely to take next year off (48% versus 32%).

PROSPECTS: AREAS OF CONCERN

Prospects most at risk of not attending in September are more likely than others to have a number of concerns, but especially about finances.



- The table on the right compares all prospects to 'high risk' ones across a range of areas of concern regarding September, 2020. 'High risk' prospects are defined as those who strongly agree that they will likely take next year off.
- High risk prospects are more likely than those overall to:
 - Anticipate that disruptions will last longer
 - Be thinking about changing plans to leave home
 - Be concerned about attending if universities open for in-person classes in September
 - Be taking classes that would normally include labs or other hands-on elements
 - Be concerned about financing their education

| AREAS OF CONCERN | All Prospects (n=164) | Those at High Risk | GAP |
|--|--------------------------|--------------------|-----|
| EXPECT THAT DISRUPTION WILL LAST MORE THAN 6 MONTHS | 14% | 20% | +6 |
| LEAVING HOME | | | |
| 'VERY LIKELY' TO LEAVE HOME FOR UNIVERSITY (PRIOR TO COVID-19) | 44% | 52% | +8 |
| AMONG THOSE LIKELY TO LEAVE HOME, NOW SAY THEY WILL NOT LEAVE HOME TO ATTEND UNIVERSITY IN SEPTEMBER | 13% | 20% | +7 |
| COMING TO CAMPUS | | | |
| 'VERY CONCERNED' ABOUT COMING TO CAMPUS IF UNIVERSITIES ARE OPEN IN SEPTEMBER | 23% | 43% | +20 |
| LABS | | | |
| OVER 50% OF CLASSES HAVE LABS/HANDS-ON COMPONENTS | 15% | 22% | +7 |
| FINANCES | | | |
| SAY ABILITY TO FINANCE EDUCATION HAS CHANGED FOR THE WORSE | 56% | 70% | +14 |
| STRONGLY AGREE: 'I won't be able to afford university without taking on more debt than I am comfortable with.' | 22% | 49% | +27 |
| HEALTH | | | |
| VERY CONCERNED ABOUT CONTRACTING COVID-19 ON CAMPUS (I.E. MUCH LESS LIKELY TO REGISTER AS RESULT OF THEIR CONCERN) | 15% | 19% | +4 |

STUDENTS: AREAS OF CONCERN

Current students most at risk of not attending in September are also likely to have heightened concerns about their ability to finance their education.



- The table on the right compares all current students to 'high or moderate risk' ones across a range of areas of concern regarding September, 2020. 'High or moderate risk' students are defined as those who agree that they will likely take next year off.
- Current students at risk are more likely than all students to:
 - Now be less likely to now leave home; this suggests they may delay a term/year
 - Be concerned about attending if universities open for in-person classes in September
 - Be concerned about financing their education
- Unlike with prospects, the proportion of courses with labs has no impact.

| AREAS OF CONCERN | All Students | Those at Risk High/ Moderate (n=124) | GAP |
|---|--------------|---|-----|
| EXPECT THAT DISRUPTION WILL LAST MORE THAN 6 MONTHS | 15% | 16% | +1 |
| LEAVING HOME | | | |
| 'VERY LIKELY' TO LEAVE HOME FOR UNIVERSITY (PRIOR TO COVID-19) | 61% | 53% | -8 |
| AMONG THOSE LIKELY TO LEAVE HOME, NOW SAY THEY WILL NOT LEAVE HOME TO ATTEND UNIVERSITY IN SEPTEMBER | 8% | 24% | +16 |
| COMING TO CAMPUS | | | |
| 'VERY CONCERNED' ABOUT COMING TO CAMPUS IF UNIVERSITIES ARE OPEN IN SEPTEMBER | 15% | 27% | +15 |
| LABS | | | |
| OVER 50% OF CLASSES HAVE LABS/HANDS-ON COMPONENTS | 17% | 17% | 0 |
| FINANCES | | | |
| SAY ABILITY TO FINANCE EDUCATION HAS CHANGED FOR THE WORSE | 49% | 62% | +13 |
| STRONGLY AGREE: 'I won't be able to afford university without taking on more debt than I am comfortable with.' | 15% | 33% | +18 |
| HEALTH | | | |
| VERY CONCERNED CONTRACTING COVID-19 ON CAMPUS (I.E. MUCH LESS LIKELY TO REGISTER AS RESULT OF THEIR CONCERN) | 13% | 17% | +4 |

PARENTS: AREAS OF CONCERN

Parents with children most at risk of not attending in September have heightened concerns about both financing and health/safety.



- The table on the right compares all parents to 'high and/or moderate risk' ones across a range of areas of concern regarding September, 2020. 'High or moderate risk' parents are defined as those who strongly agree or at least somewhat agree that their child will likely take next year off.
- Parents with children at risk are more likely than all parents to:
 - Anticipate long disruptions
 - Indicate that their child will now not leave home
 - Be very concerned about their child coming to campus in September
 - Be much more concerned about finances
 - Be concerned about their child contracting COVID-19 on campus
- Unlike with prospects, the proportion of courses with labs has no impact.

| AREAS OF CONCERN | Total | Those at Risk High/ Moderate (n=208) | GAP |
|---|-------|---|-----|
| EXPECT THAT DISRUPTION WILL LAST MORE THAN 6 MONTHS | 17% | 25% | +8 |
| LEAVING HOME | | | |
| 'VERY LIKELY' TO LEAVE HOME FOR UNIVERSITY (PRIOR TO COVID-19) | 41% | 37% | -4 |
| AMONG THOSE LIKELY TO LEAVE HOME, NOW SAY THEY WILL NOT LEAVE HOME TO ATTEND UNIVERSITY IN SEPTEMBER | 12% | 28% | +16 |
| COMING TO CAMPUS | | | |
| 'VERY CONCERNED' ABOUT COMING TO CAMPUS IF UNIVERSITIES ARE OPEN IN SEPTEMBER | 24% | 46% | +22 |
| LABS | | | |
| OVER 50% OF CLASSES HAVE LABS/HANDS-ON COMPONENTS | 12% | 10% | -2 |
| FINANCES | | | |
| SAY ABILITY TO FINANCE EDUCATION HAS CHANGED FOR THE WORSE | 54% | 70% | +16 |
| STRONGLY AGREE: 'My child won't be able to afford university without taking on more debt than they are comfortable with.' | 12% | 34% | +22 |
| HEALTH | | | |
| VERY CONCERNED OVER CHILD CONTRACTING COVID-19 ON CAMPUS (I.E. MUCH LESS LIKELY TO REGISTER AS RESULT OF THEIR CONCERN) | 14% | 21% | +7 |

MAIN REASON FOR CHOOSING TO CHANGE PLANS RE: LEAVING HOME TO ATTEND UNIVERSITY

Prospects and current students who were planning to live away from home in September but might now change their plans are most concerned about their health and financial situation, but also the possibility that classes will be online.



QE3 (Students)
QE3 (Parents)
Base:
Note:

What is the main reason for considering changing plans about living away from home?
What is the main reason for considering changing plans about living away from home?
Considering changing plans about living away from home
'Other' and 'DK' responses not shown

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7

STRATEGIES TO ADDRESS CONCERNS AND ENCOURAGE ENROLMENT

Section Highlights

Despite concerns about the potential for COVID-19 on campus, most students want in-person learning options, and a return to in-person classes as soon as it is safe.

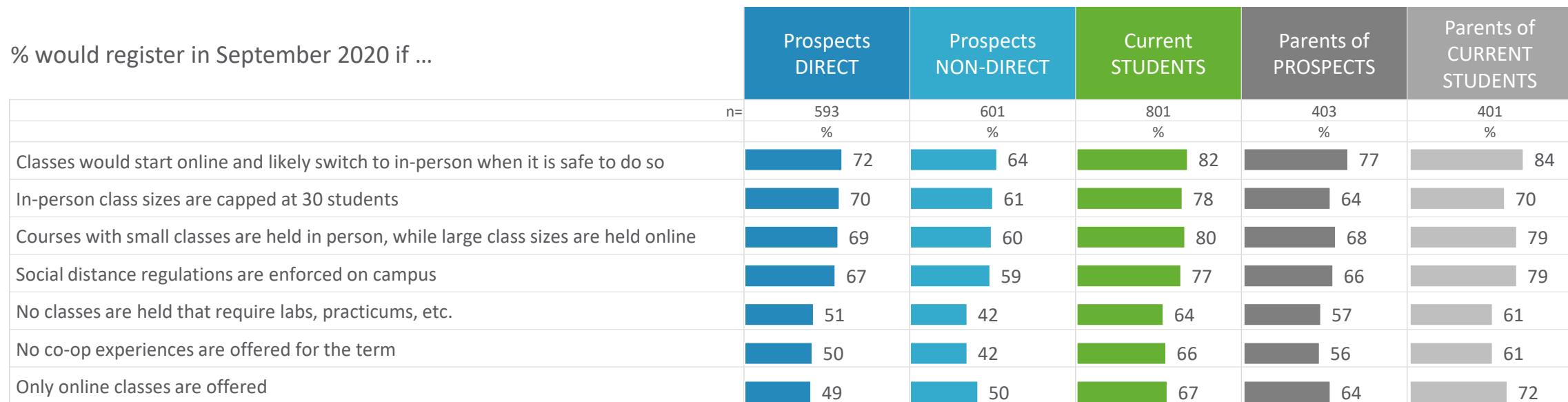
Universities are at greatest risk of significant enrolment declines if only online classes are offered.

Addressing Concerns and Encouraging Enrolment

- Plans that involve classes starting online with a switch to in-person when it is safe to do so and/or small in-person class sizes are the scenarios most likely to be embraced.
- Given the difficulty (or impossibility) for universities of starting the term online and then pivoting to in-person classes mid-term, it may be preferable to consider other ways of meeting the needs of students who strongly desire in-person learning opportunities (e.g., small tutorials, office hours, small group study sessions, etc.).

IMPACT OF VARIOUS BACK-TO-SCHOOL APPROACHES ON REGISTRATION

Plans that involve classes starting online with a switch to in-person when it is safe to do so and/or small in-person class sizes are the scenarios most likely to be embraced. Universities are most at risk of significant enrolment declines if only online classes are offered, and no labs or experiential learning opportunities.



QD6 (Students) Please consider the following situations that may be offered by the university you attend or are hoping to attend in September 2020. Please indicate how each situation might impact your intent to register as a student in September 2020?

QD6 (Parents) Please consider the following situations that may be offered by your child's university in September 2020. Please indicate how you believe each situation would impact any advice you might offer your child regarding registering or not registering in September in light of COVID 19?

Base: Total sample

PROSPECTS: IMPACT OF ONLINE ONLY VERSUS ENHANCED ONLINE OPTIONS

The potential that classes might switch from online to in-person when it is safe to do so, or that some small classes could be held in person, could significantly impact applicants' willingness to attend in September.

- The table on the right compares differences in likelihood of attending in September, 2020 if classes are online only versus if there is a chance that classes will switch to in-person or if some small classes are held in-person.
- While direct prospects express a stronger determination to attend than non-direct prospects under all scenarios, neither group wants an online-only experience.

| IMPACT OF ONLINE ONLY VERSUS 'ENHANCED ONLINE' OPTIONS % will attend in Sept 2020 if... | | All Prospects | Prospects at High Risk | GAP |
|---|------------|---------------|------------------------|------------|
|  DIRECT PROSPECTS CLASSES START ONLINE AND LIKELY SWITCH TO IN-PERSON WHEN IT IS SAFE TO DO SO ONLY ONLINE CLASSES ARE OFFERED | 72% | 51% | | |
| | 49% | 35% | | |
| | -23 | -16 | | |
| | | | -21 | -14 |
|  NON-DIRECT PROSPECTS CLASSES START ONLINE AND LIKELY SWITCH TO IN-PERSON WHEN IT IS SAFE TO DO SO ONLY ONLINE CLASSES ARE OFFERED | 64% | 60% | | -4 |
| | 50% | 47% | | -3 |
| | -14 | -13 | | |
| | | | -19 | -14 |
|  DIRECT PROSPECTS COURSES WITH SMALL CLASSES ARE IN-PERSON, WHILE LARGE CLASSES ARE ONLINE ONLY ONLINE CLASSES ARE OFFERED | 69% | 50% | | |
| | 49% | 35% | | |
| | -20 | -15 | | |
| | | | -19 | -14 |
|  NON-DIRECT PROSPECTS COURSES WITH SMALL CLASSES ARE HELD IN-PERSON, WHILE LARGE CLASSES ARE ONLINE ONLY ONLINE CLASSES ARE OFFERED | 60% | 53% | | -7 |
| | 50% | 47% | | -3 |
| | -10 | -6 | | |
| | | | -10 | -6 |

STUDENTS: IMPACT OF ONLINE ONLY VERSUS ENHANCED ONLINE OPTIONS

The potential that classes might switch from online to in-person when it is safe to do so, or that some small classes could be held in person could significantly impact students' willingness to attend in September.

- The table on the right compares differences in likelihood of attending in September, 2020 if classes are online only versus if there is a chance that classes will switch to in-person, or if some small classes are held in-person.
- Online-only is not an attractive option for current students, but most will continue with their studies. Registrations will increase if some small classes are offered in person or with a commitment to introduce in-person classes as soon as it is safe to do so.



| IMPACT OF ONLINE ONLY VERSUS 'ENHANCED ONLINE' OPTIONS % will attend in Sept 2020 if... | All Students | Students at Risk | GAP |
|--|--------------|---------------------|-----|
| | | High/Moderate (n=) | |
| CLASSES WOULD START ONLINE AND LIKELY SWITCH TO IN-PERSON WHEN IT IS SAFE TO DO SO | 82% | 65% | -17 |
| ONLY ONLINE CLASSES ARE OFFERED | 67% | 55% | -12 |
| GAP | -15 | -10 | |
| | | | |
| COURSES WITH SMALL CLASSES ARE HELD IN PERSON, WHILE LARGE CLASS SIZES ARE HELD ONLINE | 80% | 59% | -21 |
| ONLY ONLINE CLASSES ARE OFFERED | 67% | 55% | -12 |
| GAP | -13 | -4 | |

PARENTS: IMPACT OF ONLINE ONLY VERSUS ENHANCED ONLINE OPTIONS

Overall, most parents indicate that their children will attend if universities commit to a switch to in-person classes when it is safe to do so. However, parents at risk remain relatively unswayed by any of the options.

- The table on the right compares differences in likelihood of attending in September, 2020 if classes are online only versus if there is a chance that classes will switch to in-person, or if some small classes are held in-person.
- Classes that start online and switch to in-person when it is safe to do so is the most attractive option for parents overall.
- However, parents at risk (i.e., who agree that their child is likely to take a year off) aren't swayed by the potential for a shift to in-person classes, or for small in-person classes. This suggests a heightened concern about health/safety.

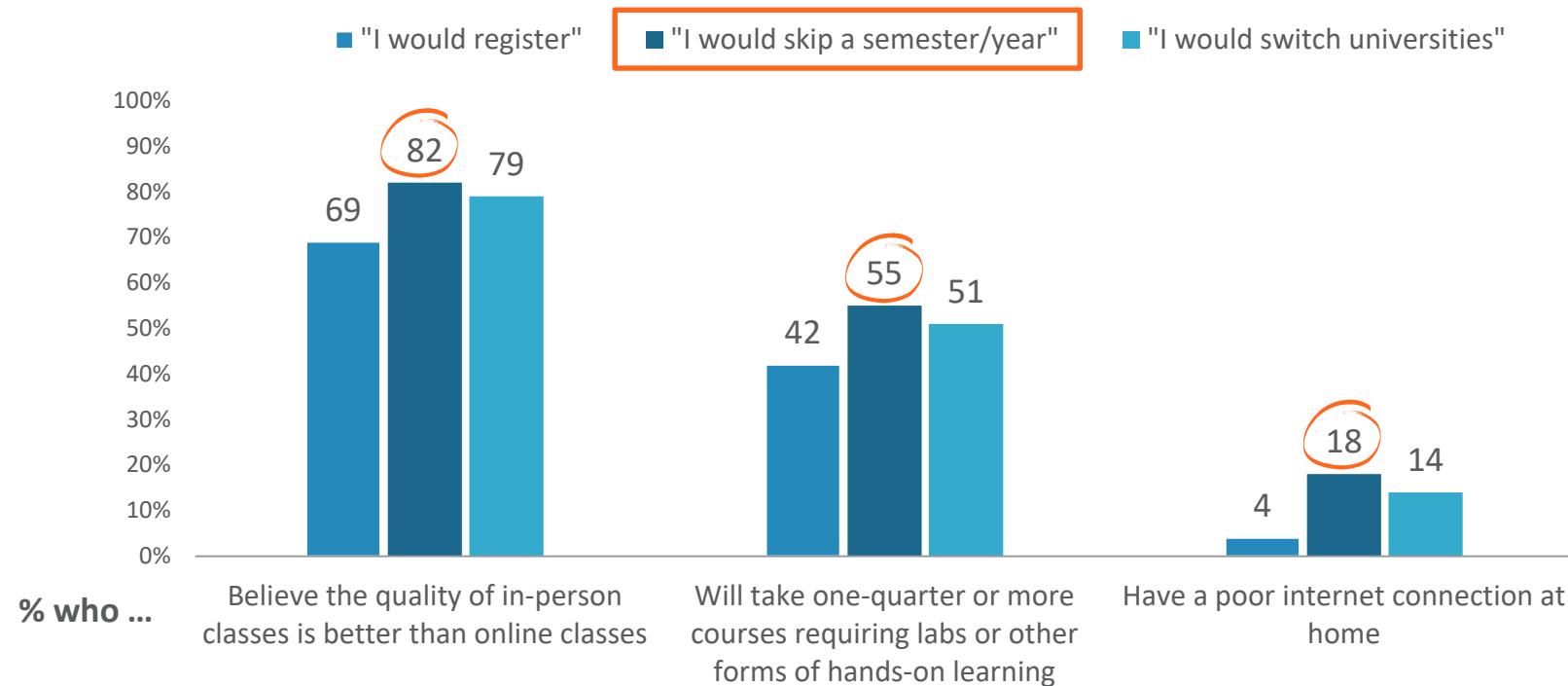


| IMPACT OF ONLINE ONLY VERSUS 'ENHANCED ONLINE' OPTIONS % will attend in Sept 2020 if... | All Parents | Those at Risk | GAP |
|--|-------------|---------------|-----|
| | | | |
| CLASSES WOULD START ONLINE AND LIKELY SWITCH TO IN-PERSON WHEN IT IS SAFE TO DO SO | 80% | 52% | -28 |
| ONLY ONLINE CLASSES ARE OFFERED | 68% | 50% | -18 |
| GAP | -12 | -2 | |
| | | | |
| COURSES WITH SMALL CLASSES ARE HELD IN PERSON, WHILE LARGE CLASS SIZES ARE HELD ONLINE | 73% | 50% | -23 |
| ONLY ONLINE CLASSES ARE OFFERED | 68% | 50% | -18 |
| GAP | -5 | 0 | |

REASONS FOR SKIPPING A SEMESTER/YEAR IF COURSES ARE ONLY ONLINE

Prospects/current students who do not want to attend in September if courses are only offered online are more likely than others to: have concerns about the quality of online instruction, be taking some courses with labs/hands-on components, and have a poor internet connection at home.

Intention of prospects/current students if only online classes are held in September 2020...



DIRECT PROSPECTS: INCENTIVES AND BARRIERS TO REGISTRATION

Direct prospects will be encouraged to enrol if there is a possibility that in-person classes will be offered when it is safe to do so. Of support services, they most value mental health resources.



Incentives

- The biggest incentive for direct prospects to attend is the potential that they will be able to have safe, small, in-person classroom experiences in the fall.
- They also value the availability of online mental health resources (esp. direct prospects who are currently most at risk of taking a year off).

Barriers

- Concerns over contracting COVID-19 on campus are present, but are not as important as other factors like the learning environment or availability of mental health resources.

| | Total (n=607) | Those at Risk High/ Medium (n=170) | GAP |
|--|------------------|--|-----|
| INCENTIVES (Much/somewhat more likely to enrol) | | | |
| AFFORDABILITY | | | |
| Tuition fees are lowered for courses delivered online | 74% | 67% | -7 |
| Ability to afford tuition and other expenses (books, meals, living expenses, rent, etc.) | 43% | 47% | +4 |
| LEARNING ENVIRONMENT | | | |
| All classes taught online to start, with possibility of switching to in-person when safe | 48% | 58% | +10 |
| A mixture of online and in-person classes are offered to limit interactions | 45% | 58% | +13 |
| The number of teaching assistants are increased to reduce class sizes | 48% | 55% | +7 |
| There may be rules in place limiting the size of classes | 41% | 55% | +14 |
| SUPPORT SERVICES | | | |
| Mental health resources are available online | 43% | 56% | +13 |
| BARRIERS (Much/somewhat less likely to enrol) | | | |
| LEARNING ENVIRONMENT | | | |
| Labs and other hands-on type classes may not be available for the first term | 29% | 30% | +1 |
| Concerns over contracting COVID-19 on campus | 38% | 41% | +3 |
| SUPPORT SERVICES | | | |
| There may be limited student services | 35% | 38% | +3 |
| Students with disabilities/special needs may not have needed services available | 19% | 26% | +7 |
| Student clubs may not be available | 26% | 35% | +9 |

CURRENT STUDENTS: INCENTIVES AND BARRIERS TO REGISTRATION

For current students, affordability is a pressing concern. They also want a return to in-person classes as soon as it is safe to do so.



Incentives

- Affordability is a pressing issue for current students at risk of not returning in the fall. Universities need to be sensitive to the stressed financial situations of students and, for instance, seek out ways to reduce/mitigate ancillary costs (and certainly not require that students make purchases to facilitate the shift to online learning and evaluation).
- Starting online with the possibility of a switch to in-person classes when it's safe to do so is a strong incentive to return, as is smaller classes.
- Current students would value the availability of online mental health resources.

Barriers

- Building up online student services in all areas may help to mitigate students' concerns about the coming year, especially for students with disabilities.

| | Total (n=801) | Those at Risk High/ Medium (n=124) | GAP |
|--|------------------|--|-----|
| INCENTIVES (Much/somewhat more likely to enrol) | | | |
| AFFORDABILITY | | | |
| Tuition fees are lowered for courses delivered online | 77% | 73% | -4 |
| Ability to afford tuition and other expenses (books, meals, living expenses, rent, etc.) | 45% | 58% | +13 |
| LEARNING ENVIRONMENT | | | |
| All classes taught online to start, with possibility of switching to in-person when safe | 51% | 60% | +9 |
| A mixture of online and in-person classes are offered to limit interactions | 48% | 50% | +2 |
| The number of teaching assistants are increased to reduce class sizes | 42% | 51% | +9 |
| There may be rules in place limiting the size of classes | 40% | 46% | +6 |
| SUPPORT SERVICES | | | |
| Mental health resources are available online | 39% | 46% | +7 |
| BARRIERS (Much/somewhat less likely to enrol) | | | |
| LEARNING ENVIRONMENT | | | |
| Labs and other hands-on type classes may not be available for the first term | 25% | 23% | -2 |
| Concerns over contracting COVID-19 on campus | 41% | 44% | +3 |
| SUPPORT SERVICES | | | |
| There may be limited student services | 32% | 41% | +9 |
| Students with disabilities/special needs may not have needed services available | 22% | 33% | +11 |
| Student clubs may not be available | 20% | 17% | -3 |

Affordability is a pressing concern for parents too.



Incentives

- Among parents of prospective students, especially those with children at risk of not enrolling, affordability issues are significant.
- Further, any actions universities can take to safely move to small in-person learning environments when possible will encourage enrolment.
- The most important student service, by far, is online mental health resources.

Barriers

- Parents have some concerns regarding the potential that their child could contract COVID-19 on campus.
- Limits to student services (other than mental health resources) or clubs are not a major issue for parents.

| | Total (n=403) | Those at Risk High/ Medium (n=157) | GAP |
|--|------------------|--|-----|
| INCENTIVES (Much/somewhat more likely to enrol) | | | |
| AFFORDABILITY | | | |
| Tuition fees are lowered for courses delivered online | 67% | 76% | +9 |
| Ability to afford tuition and other expenses (books, meals, living expenses, rent, etc.) | 45% | 58% | +13 |
| LEARNING ENVIRONMENT | | | |
| All classes taught online to start, with possibility of switching to in-person when safe | 57% | 63% | +6 |
| A mixture of online and in-person classes are offered to limit interactions | 57% | 65% | +7 |
| The number of teaching assistants are increased to reduce class sizes | 61% | 65% | +4 |
| There may be rules in place limiting the size of classes | 56% | 61% | +5 |
| SUPPORT SERVICES | | | |
| Mental health resources are available online | 49% | 60% | +11 |
| BARRIERS (Much/somewhat less likely to enrol) | | | |
| LEARNING ENVIRONMENT | | | |
| Labs and other hands-on type classes may not be available for the first term | 21% | 27% | +6 |
| Concerns over contracting COVID-19 on campus | 37% | 39% | +2 |
| SUPPORT SERVICES | | | |
| There may be limited student services | 17% | 24% | +7 |
| Students with disabilities/special needs may not have needed services available | 13% | 14% | +1 |
| Student clubs may not be available | 10% | 15% | +5 |

8

EXPECTATIONS RE: ONLINE LEARNING

Section Highlights

Clearly, in-person classes are considered superior to online formats. However, most students are comfortable taking online courses if necessary and are likely to be reasonably satisfied with the experience.

Delivering a High Quality Online Learning Experience

- The most valuable ways to improve the quality of online courses are:
 - **Flexibility** – students appreciate the flexibility that online courses offer
 - **Access to instructors** – the ability to access TAs more easily
 - **Interactivity** – students want to be able to interact with their professors online and, to a lesser extent, to collaborate with their peers
 - **Keeping students motivated** – current students in particular note that online courses are not as motivating. Structure and incentives may help.
- Key challenges include: supporting incoming 1st years, students with poor internet access, and those taking a lot of courses that would typically have lab and/or hands-on components.

PRE-COVID-19 EXPERIENCE WITH ONLINE COURSES

Most students have taken online courses before, but not necessarily ones that are interactive or that include live lectures.



Most prospects and current students have prior experience with online courses.

| DIRECT Prospects | NON-DIRECT Prospects | Current Students |
|------------------|----------------------|------------------|
| 50% | 70% | 60% |

However, their prior online learning experiences tend to be static (i.e., heavy on readings/videos and light on live lectures).

| | Prospects DIRECT | Prospects NON-DIRECT | Current STUDENTS |
|-------------------------------|------------------|----------------------|------------------|
| n= | 299 | 419 | 481 |
| % | | | |
| Readings (online and offline) | 73 | 66 | 75 |
| Videos | 49 | 42 | 51 |
| Recorded lecture(s) | 31 | 44 | 48 |
| Lecture-style in real time | 23 | 36 | 24 |

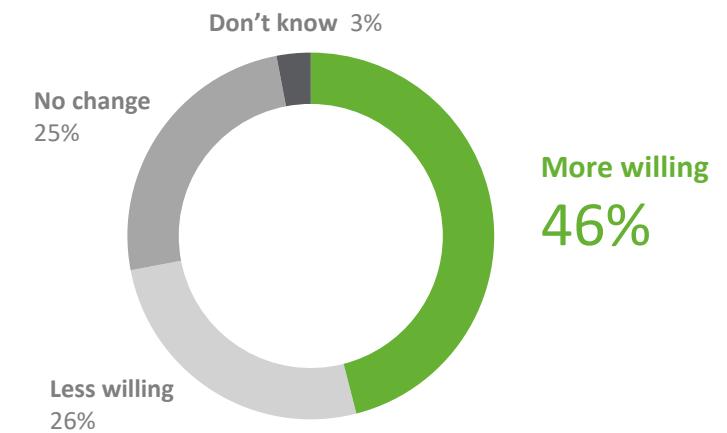
SATISFACTION WITH ONLINE FORMATS

Most students are open to online learning. They are satisfied with the courses they have taken in the past, and recent experiences moving online as a result of COVID-19 make many students more willing to take online courses in September.

Satisfaction with all online learning formats is high.

| % SATISFIED | Prospects DIRECT | Prospects NON-DIRECT | Current STUDENTS |
|-------------------------------|---------------------|-------------------------|---------------------|
| | % | % | % |
| Lecture-style in real time | 96 | 90 | 82 |
| Recorded lecture(s) | 95 | 88 | 88 |
| Videos | 91 | 86 | 82 |
| Readings (online and offline) | 85 | 83 | 78 |

Close to half of **current students** are now **more willing** to take online courses as a result of their recent experiences.



QC5 (Students)

For the following, please indicate how satisfied you were with the various formats used.

Base:

Those who experienced each format (base sizes vary)

QC8 (Students)

For the following question, please think specifically about the experience you may have had when classes were moved online as a result of COVID 19. What impact, if any, has that experience had on your willingness to take online classes/courses offered by universities should campuses not be able to re-open in September?

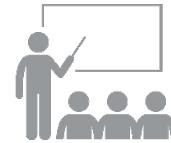
Base:

Current students (n=801)

CONFIDENTIAL

QUALITY OF IN-PERSON VS ONLINE CLASSES BY SAME LECTURERS

However, a majority of students feel the quality of a class is better when it is held in-person than online, which accounts for much of the reluctance around online-only formats. Students without previous online course experience are the most negative about it; their views might soften once they engage with online formats.



Quality is better with
in-person classes

74%

Prospects DIRECT



17

4

2

6%

Don't know: 3%

70%

Prospects NON-DIRECT



19

6

2

8%

Don't know: 3%

70%

Current Students



18

4

1

5%

Don't know: 3%



Quality is better with
online classes

6%

Don't know: 3%

8%

Don't know: 3%

5%

Don't know: 3%

Students who have taken online courses in the past (before COVID-19) tend to be a little more positive about online learning:

70%

Previous online experience - YES



20

5

2

7%

Don't know: 2%

77%

Previous online experience - NO



15

4

1

5%

Don't know: 4%

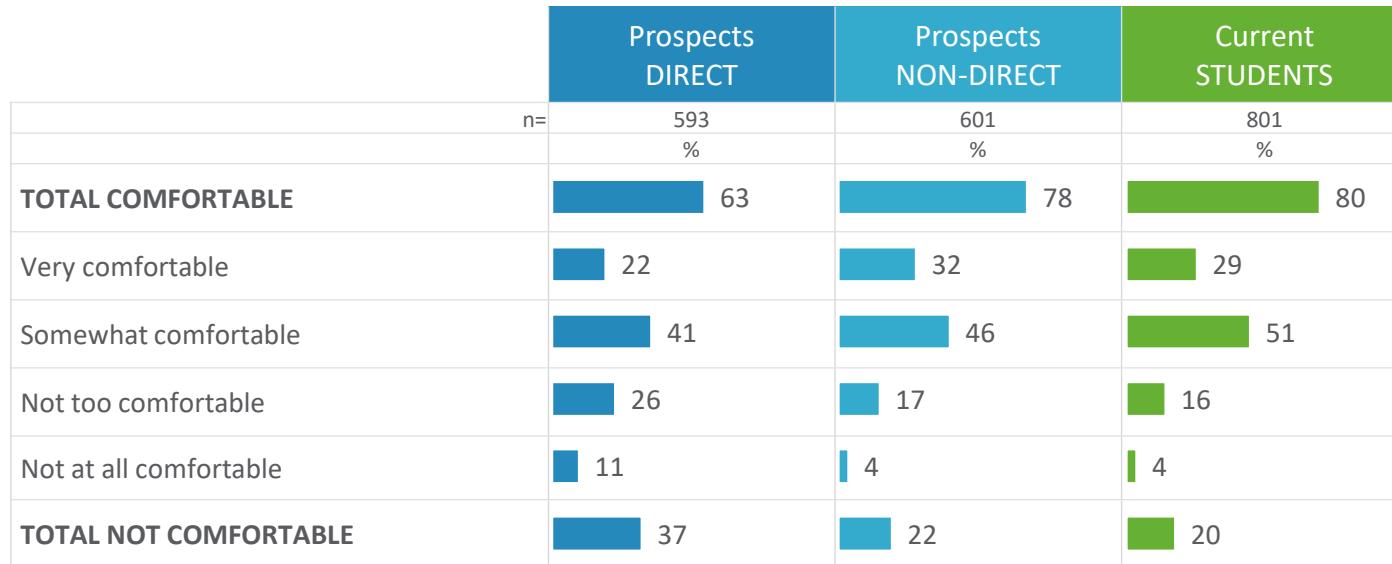
■ ■ ■ Quality of in-person classes is much better (5 on a 5-point scale)

□ Quality is the same (3 on a 5-point scale)

■ Quality of online classes is much better (1 on a 5-point scale)

COMFORT TAKING ONLINE CLASSES UNTIL IN-PERSON CLASSES CAN RESUME

Most say they will be comfortable continuing their studies online should it be necessary. However, a sizeable minority – especially prospects direct from high school – are apprehensive.



- Prospects and students with poor internet access, and/or who plan to take a lot of courses with labs or other hands-on components are more likely to feel uncomfortable.

WAYS TO IMPROVE THE QUALITY OF ONLINE COURSES

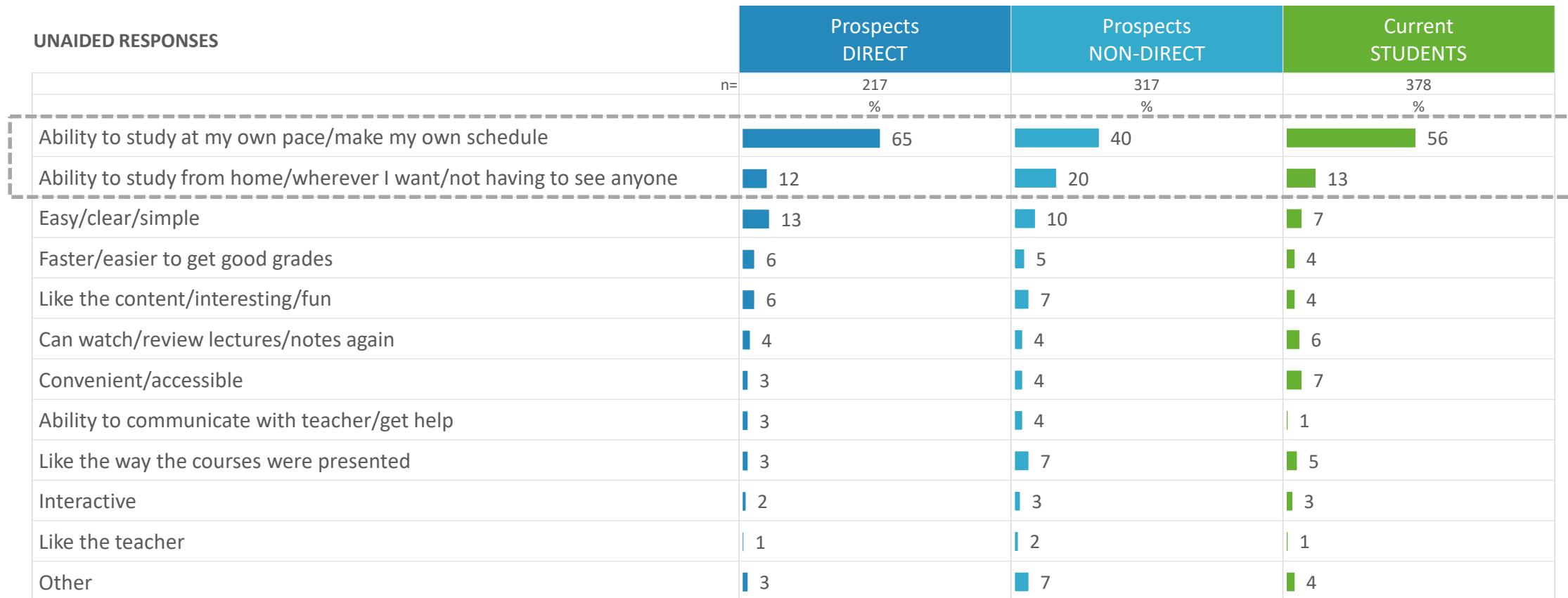
Key ways to improve the quality of online courses are: flexibility, access to instructors, and opportunities to interact with professors.



- Parents, particularly of prospects, are likely to want classes offered on a set schedule in real time.
- Students attending a primarily undergraduate university are also more likely to want classes in real time (45% versus 37% at comprehensive and 32% at medical/doctoral institutions).

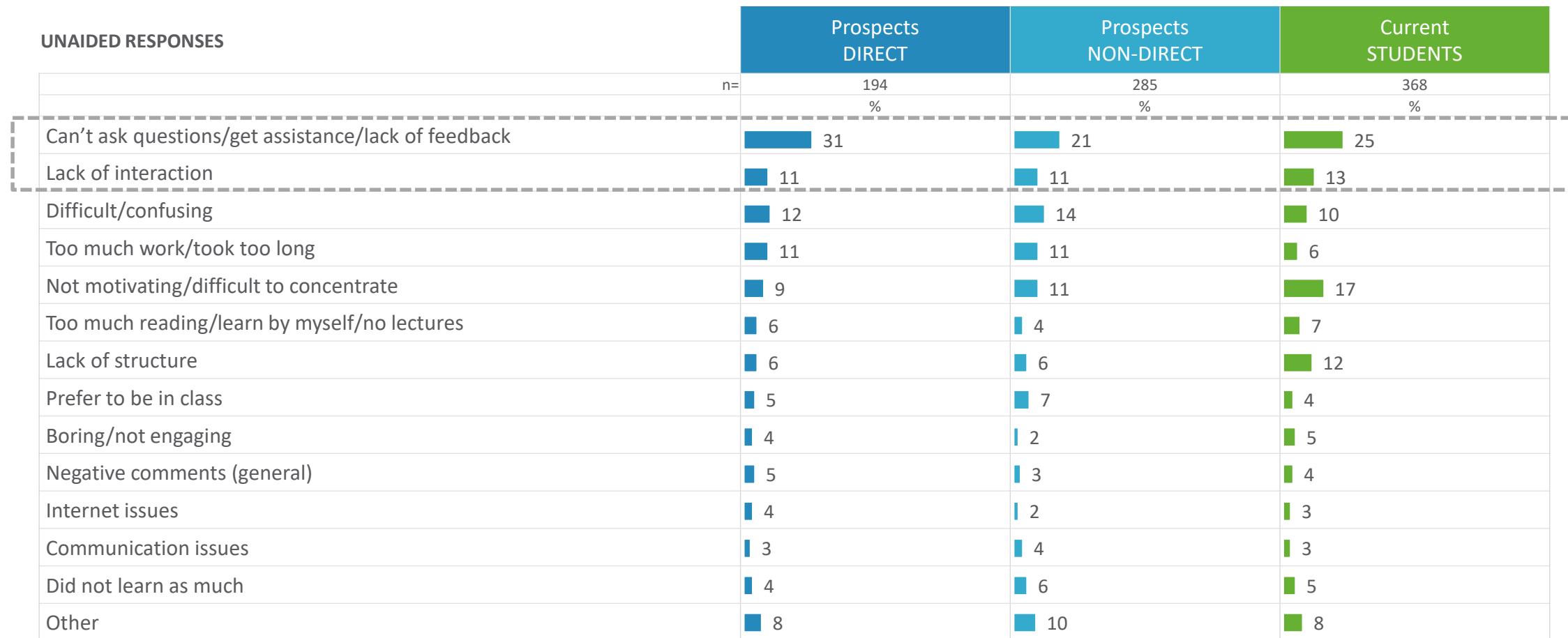
BEST ASPECTS OF ONLINE COURSES – OPEN-ENDED

By far, flexibility is the most appreciated aspect of online courses.



WORST ASPECTS OF ONLINE COURSES – OPEN-ENDED

The worst aspect of online courses is lack of interactivity. Lack of motivation and structure are also notable mentions among current students.



9

MESSAGING

Section Highlights

More so than any other message, students and parents need to hear that keeping students safe is your university's #1 priority.

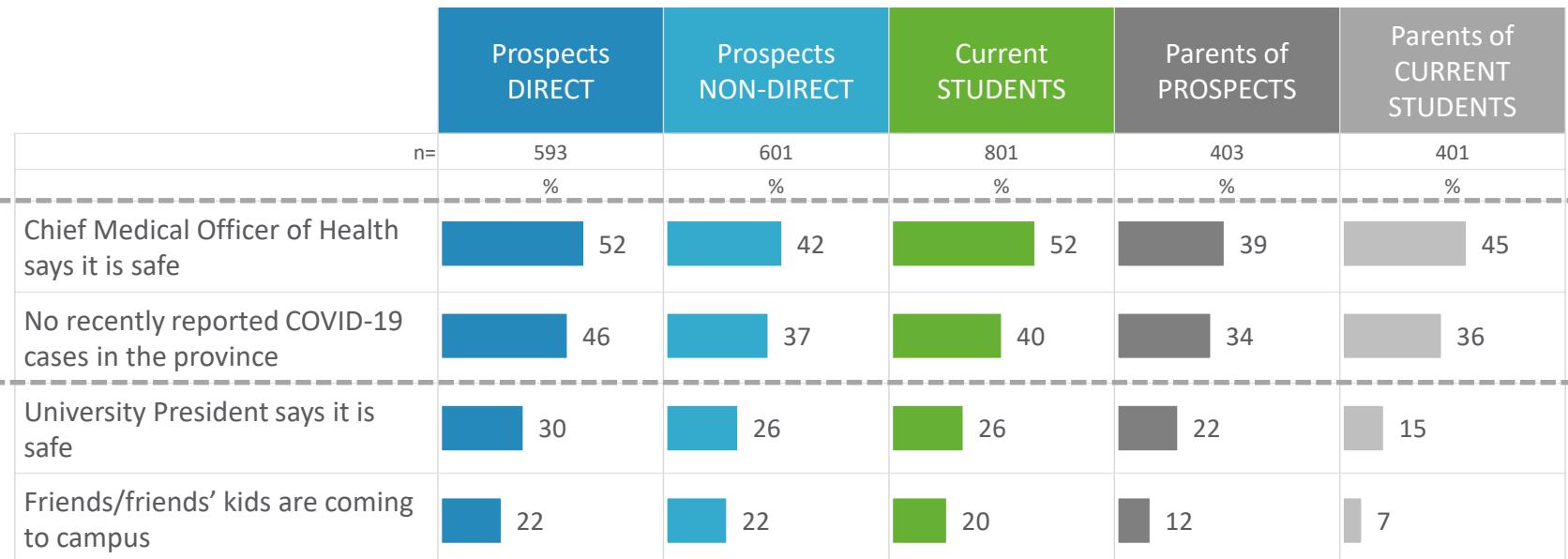
Messaging

- Provincial health officials are the most credible sources of information re: safety. Thus, it may be helpful to echo or amplify their messages in communications from university officials.
- In addition to hearing that keeping students safe is the top priority, students and parents want to know that universities have a plan to do so.
- Messages about quality of online education are secondary to ones about safety, but are still valued (especially by parents).

HOW TO ENCOURAGE STUDENTS TO COME TO CAMPUS

Most students will feel strongly encouraged to come to campus if the province's lead health official says it is safe. Assurances from university officials will help, but will be less persuasive; it will be vital for universities to provide evidence and detailed plans.

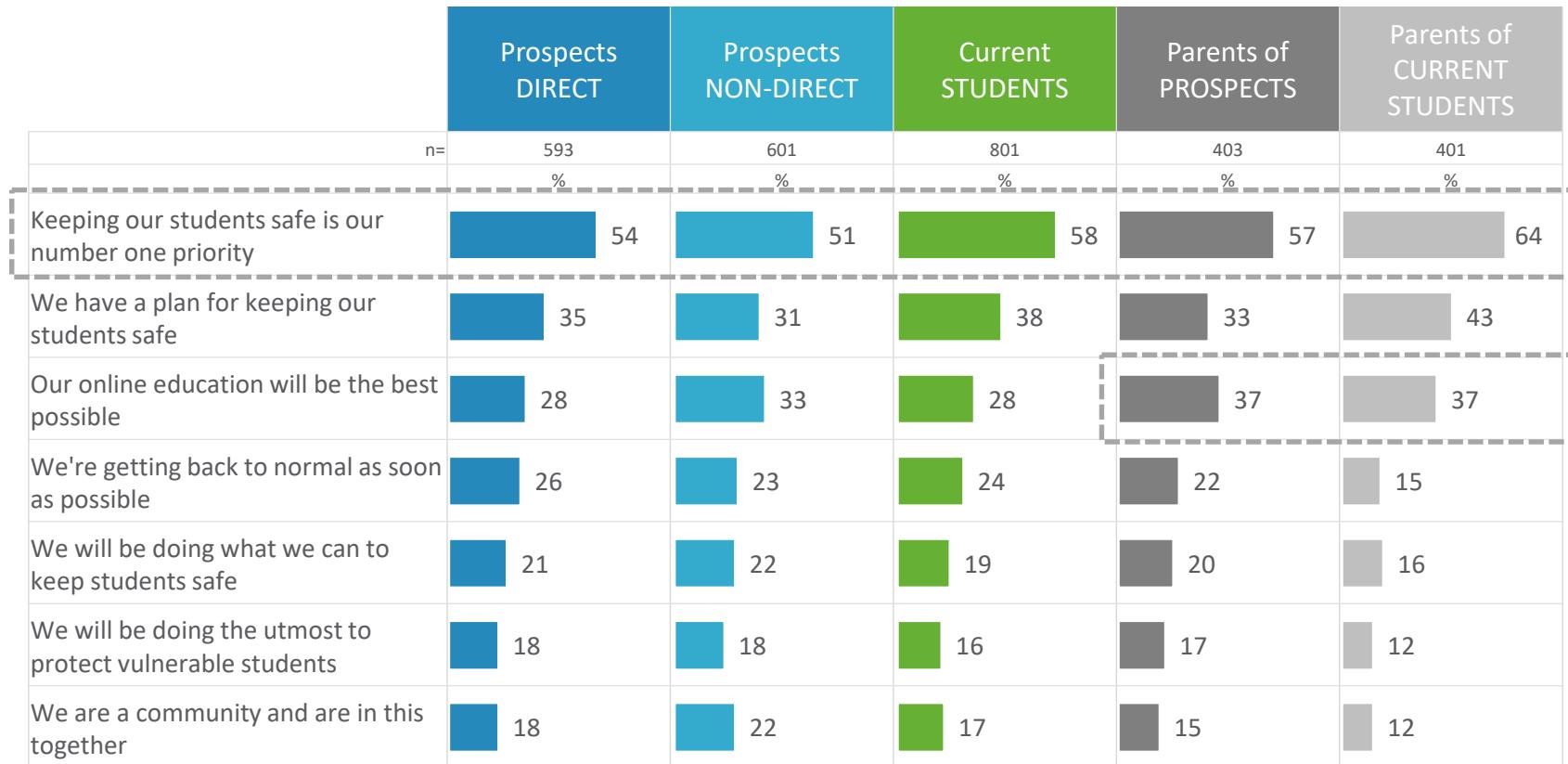
% WOULD ENCOURAGE THEM 'A GREAT DEAL' (TOP BOX)



- The relative importance of different messages varies little by group, province, or other demographic variables.
- The chart shows the proportions that indicate that each scenario would encourage them 'a great deal'. When 'somewhat' is included, no fewer than 7-in-10 indicate that they would be encouraged to come to campus if the Chief Medical Officer of Health says it is safe.

MOST REASSURING MESSAGES

More so than any other message, students and parents need to hear that keeping students safe is your university's #1 priority. Second to safety, is a message about your university's quality of online education. Parents are somewhat more likely than students to want reassurances about quality.



- **Parents of current students** in particular want reassurances that safety is the #1 priority and that universities have a plan.
- **Prospects in SK/MB** are more likely than those in other provinces to want to hear that your university is getting back to normal as soon as possible (33%), presumably because of lower case counts in SK/MB.

QF3 (Students)
QF3 (Parents)
Base:
Total sample

In your opinion, which TWO of the following potential messages from your university are the most reassuring?
In your opinion, which TWO of the following potential messages from your child's university are the most reassuring to you as a parent?

CONFIDENTIAL

A

APPENDIX A: STUDENT CHARACTERISTICS

ACCEPTANCE AT UNIVERSITY

Three-quarters of direct prospects and just under two-thirds of non-direct prospects had received acceptances.

| | | Prospects – DIRECT | Prospects – NON-DIRECT | Parents of Prospects |
|---------------------|----|-----------------------|---------------------------|-------------------------|
| | n= | 593 | 601 | 403 |
| | % | % | % | % |
| Yes | | 76 | 63 | 72 |
| No | | 12 | 25 | 23 |
| Don't know/not sure | | 12 | 12 | 5 |

QB4 (Students)
QB2 (Parents)
Base:
CONFIDENTIAL

Up to the present time, have you been accepted by any universities you have applied to?
Up to the present time, has your child been accepted by any universities they applied to?
Prospective students and parents of prospective students

PROVINCE WHERE ATTENDING/WANT TO ATTEND UNIVERSITY

Approximately half of each sample group are attending/want to attend university in Ontario; one-fifth in BC; 15% in Alberta and around 10% in the Prairies and Atlantic Canada.

| | n= | Prospective Students – High School | Prospective Students – Non-High School | Current Students | Parents of Prospective Students | Parents of Current Students |
|-------------------------|----|------------------------------------|--|------------------|---------------------------------|-----------------------------|
| | | 593 | 601 | 801 | 403 | 401 |
| | | % | % | % | % | % |
| British Columbia | | 26 | 21 | 16 | 23 | 16 |
| Alberta | | 16 | 18 | 13 | 17 | 13 |
| Saskatchewan | | 5 | 5 | 3 | 4 | 4 |
| Manitoba | | 5 | 6 | 4 | 4 | 4 |
| Ontario | | 53 | 51 | 48 | 56 | 47 |
| Quebec | | 10 | 7 | 5 | 4 | 6 |
| New Brunswick | | 3 | 4 | 3 | 3 | 4 |
| Nova Scotia | | 7 | 5 | 4 | 5 | 3 |
| Prince Edward Island | | 2 | 2 | <1 | 1 | 0 |
| Newfoundland & Labrador | | 1 | 2 | 2 | 2 | 2 |

QB8 (Students) In which province is the university located that you have been attending?
 QB6 (Parents) In which province is your child attending university?
 QB5 (Students) In which province(s) are you considering attending university?
 QB3 (Parents) In which province(s) is your child considering attending university?
 Base: Total sample

CONFIDENTIAL

AREA OF STUDY

Roughly one-quarter of each sample are studying/will study a subject area in the arts; four-in-ten in STEM-related subjects and slightly more than one-in-ten in business.

| | Prospective Students – High School | Prospective Students – Non-High School | Current Students | Parents of Prospective Students | Parents of Current Students |
|---|------------------------------------|--|------------------|---------------------------------|-----------------------------|
| n= | 593 | 601 | 801 | 403 | 401 |
| | % | % | % | % | % |
| ARTS | 28 | 28 | 25 | 25 | 29 |
| Fine Arts/graphics | 8 | 8 | 3 | 4 | 3 |
| Liberal Arts | 5 | 5 | 6 | 5 | 5 |
| Social Science | 12 | 11 | 12 | 12 | 15 |
| Humanities/languages | 3 | 4 | 4 | 3 | 4 |
| STEM | 39 | 33 | 42 | 45 | 41 |
| Science | 22 | 12 | 25 | 15 | 19 |
| Engineering | 10 | 10 | 9 | 16 | 12 |
| Mathematics | 2 | 3 | 3 | 1 | 2 |
| Information technology/software development | 5 | 8 | 5 | 12 | 8 |
| Business | 12 | 17 | 14 | 11 | 14 |
| Health/wellness | 9 | 12 | 9 | 11 | 9 |
| Other | 9 | 7 | 9 | 4 | 4 |
| Don't know/not sure | 3 | 3 | 2 | 4 | 3 |

QD1 (Students)

Thinking about the 2020-21 school year, in which Faculty or broad area of study are you intending to study?

QD1 (Parents)

Thinking about the 2020-21 school year, to the best of your knowledge, in which Faculty or broad area of study is your child intending to study?

Base:

Total sample

CONFIDENTIAL

INCIDENCE OF CLASSES WITH HANDS-ON LEARNING COMPONENTS

Most students expect to be taking some classes in September that include a hands-on learning component.

| | n= | Prospective Students – High School | Prospective Students – Non-High School | Current Students | Parents of Prospective Students | Parents of Current Students |
|------------------------------|----|------------------------------------|--|------------------|---------------------------------|-----------------------------|
| | | 593 | 601 | 801 | 403 | 401 |
| | | % | % | % | % | % |
| None | | 14 | 12 | 20 | 9 | 18 |
| NET LESS THAN HALF | | 48 | 60 | 53 | 52 | 46 |
| Less than a quarter | | 20 | 25 | 23 | 20 | 21 |
| Between a quarter and a half | | 28 | 35 | 30 | 32 | 24 |
| Over half | | 14 | 15 | 17 | 9 | 14 |
| Don't know/not sure | | 24 | 13 | 10 | 30 | 23 |

QD2 (Students)
QD2 (Parents)
Base:
Total sample

Approximately what proportion of the classes you intend to take in September require labs or some other kind of hands on learning (e.g. massage therapy, dance, studio time, co-op, practicums, etc.)?
Approximately what proportion of the classes your child intends to take in September require labs or some other kind of hands on learning (e.g. massage therapy, dance, studio time, co-op, practicums, etc.)?

INCIDENCE OF SIGNING LEASES FOR ACCOMMODATION

Among those who plan to leave home, about a third of current students, one-quarter of prospective non-high school students, and one-in-five prospective high school students have already signed leases for accommodation in September 2020.

| AMONG THOSE VERY/SOMEWHAT LIKELY TO LEAVE HOME FOR UNIVERSITY | | Prospective Students – High School | Prospective Students – Non-High School | Current Students | Parents of Prospective Students | Parents of Current Students |
|---|----|------------------------------------|--|------------------|---------------------------------|-----------------------------|
| | n= | 429 | 442 | 635 | 265 | 231 |
| | | % | % | % | % | % |
| Yes | | 18 | 27 | 32 | 25 | 40 |
| No | | 74 | 63 | 58 | 70 | 55 |
| Don't know/not sure | | 8 | 10 | 9 | 5 | 6 |

QE4 (Students)
QE4 (Parents)
Base:
CONFIDENTIAL

Have you signed a lease for accommodation in September 2020?
To the best of your knowledge, has your child signed a lease for accommodation in September 2020?
Very/somewhat likely to leave home to attend university

STUDENT PLANS GIVEN SIGNED LEASE

Most current students plan to keep their signed leases. Prospective students are more divided; 6-in-10 will likely keep their lease and 3-in-10 will likely try to break it.

- Prospective and current students are equally as likely to move into their planned accommodation in September, regardless of whether in-person classes have resumed.

| AMONG THOSE WHO HAVE SIGNED LEASES FOR ACCOMMODATION IN SEPTEMBER | | Prospective Students – High School | Prospective Students – Non-High School | Current Students | Parents of Prospective Students | Parents of Current Students |
|---|----|------------------------------------|--|------------------|---------------------------------|-----------------------------|
| | n= | 78 | 119 | 205 | 65 | 92 |
| | | % | % | % | % | % |
| Will likely take up residence in the accommodation in September, even if there are no in person classes | | 40 | 42 | 43 | 57 | 33 |
| Will likely try to break the lease | | 31 | 29 | 8 | 23 | 11 |
| Will likely not break the lease so that I/they have a place to stay when classes resume in person | | 19 | 21 | 40 | 11 | 39 |
| Don't know/not sure | | 10 | 8 | 9 | 9 | 17 |

QE5 (Students)
QE5 (Parents)
Base:
Have signed a lease for accommodation in September 2020

Which of the following is likely to happen because of the signed lease?
Which of the following is likely to happen because of the signed lease?
Have signed a lease for accommodation in September 2020

B

APPENDIX B: DEMOGRAPHIC CHARACTERISTICS

Students

GENDER

| Prospective Students – High School | Prospective Students – Non-High School | Current Students | |
|------------------------------------|--|------------------|--------|
| 44% | 44% | 44% | Male |
| 56% | 56% | 56% | Female |

AGE

| Prospective Students – High School | Prospective Students – Non-High School | Current Students | |
|------------------------------------|--|------------------|-------|
| 100% | 100% | 100% | 16-24 |

PERSON WITH A DISABILITY

| Prospective Students – High School | Prospective Students – Non-High School | Current Students | |
|------------------------------------|--|------------------|-----|
| 8% | 10% | 8% | Yes |
| 92% | 90% | 92% | No |

PROVINCE OF RESIDENCE

| Prospective Students – High School | Prospective Students – Non-High School | Current Students | |
|------------------------------------|--|------------------|-------------------------|
| 17% | 17% | 17% | British Columbia |
| 14% | 14% | 13% | Alberta |
| 4% | 4% | 4% | Saskatchewan |
| 4% | 4% | 4% | Manitoba |
| 48% | 48% | 48% | Ontario |
| 5% | 5% | 5% | English Quebec |
| 3% | 3% | 3% | New Brunswick |
| 3% | 3% | 3% | Nova Scotia |
| 1% | <1% | <1% | Prince Edward Island |
| 2% | 2% | 2% | Newfoundland & Labrador |
| - | - | <1% | Yukon |
| - | - | <1% | Northwest Territories |
| 39% | 39% | 38% | WEST |
| 53% | 53% | 53% | ON/QC |
| 8% | 8% | 8% | ATLANTIC |

HOUSEHOLD INCOME

| Prospective Students – High School | Prospective Students – Non-High School | Current Students | |
|------------------------------------|--|------------------|----------------------------------|
| 8% | 18% | 16% | Under \$20,000 |
| 9% | 20% | 13% | \$20,000 to less than \$40,000 |
| 10% | 16% | 12% | \$40,000 to less than \$60,000 |
| 14% | 12% | 11% | \$60,000 to less than \$80,000 |
| 11% | 11% | 9% | \$80,000 to less than \$100,000 |
| 17% | 10% | 12% | \$100,000 to less than \$150,000 |
| 10% | 4% | 10% | Over \$150,000 |
| 21% | 9% | 18% | Prefer not to answer |
| 27% | 54% | 41% | LESS THAN \$60K |
| 25% | 23% | 19% | \$60K TO \$100K |
| 27% | 14% | 22% | \$100K + |

Students

SITUATION IN THE MONTH PRIOR TO THE COVID-19 PANDEMIC

| Prospective Students – High School | Prospective Students – Non-High School | Current Students | WORKING |
|------------------------------------|--|------------------|-------------------------------------|
| 22% | 67% | 24% | WORKING |
| 1% | 33% | 3% | Working full time |
| 21% | 35% | 22% | Working part time |
| 100% | 20% | 100% | STUDENT |
| 87% | 15% | 92% | Full time student |
| 13% | 4% | 8% | Part time student |
| 3% | 12% | 3% | Unemployed and looking for work |
| 1% | 4% | <1% | Unemployed and not looking for work |
| <1% | 2% | <1% | Other |

EDUCATION

| Prospective Students – High School | Prospective Students – Non-High School | Current Students |
|------------------------------------|--|--------------------------------------|
| 8% | | Less than high school |
| 28% | | High school diploma |
| 16% | | Some college |
| 18% | | Some university |
| 10% | | College diploma/certificate |
| 3% | | College advanced diploma/certificate |
| 17% | | Undergraduate degree |

CURRENTLY ENROLLED

| Prospective Students – High School | Prospective Students – Non-High School | Current Students |
|------------------------------------|--|-----------------------------------|
| 95% | 6% | High School |
| 6% | | Private career college |
| 85% | | College |
| 5% | | CEGEP |
| | 90% | University – Undergraduate Degree |
| | 10% | University – Grad or Prof Degree |
| | 4% | Other |

Parents

GENDER

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------------|---------------------------------------|--------|
| 40% | 51% | Male |
| 60% | 49% | Female |

AGE

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------------|---------------------------------------|------------|
| 12% | 33% | 35-44 |
| 50% | 49% | 45-54 |
| 34% | 16% | 55-64 |
| 5% | 2% | 65 or over |

EDUCATION

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------------|---------------------------------------|---|
| 1% | 1% | Less than high school |
| 8% | 9% | High school diploma |
| 5% | 6% | Some college |
| 7% | 5% | Some university |
| 13% | 15% | College diploma/certificate |
| 6% | 8% | College advanced diploma/ certificate |
| 40% | 36% | Undergraduate degree |
| 20% | 20% | Master's degree or higher, Professional |
| 9% | 9% | HS OR LESS |
| 31% | 35% | COLLEGE/SOME UNIVERSITY |
| 60% | 56% | COMPLETED UNIVERSITY |

HOUSEHOLD INCOME

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------------|---------------------------------------|----------------------------------|
| 2% | 1% | Under \$20,000 |
| 5% | 7% | \$20,000 to less than \$40,000 |
| 8% | 6% | \$40,000 to less than \$60,000 |
| 10% | 12% | \$60,000 to less than \$80,000 |
| 14% | 20% | \$80,000 to less than \$100,000 |
| 27% | 26% | \$100,000 to less than \$150,000 |
| 18% | 20% | Over \$150,000 |
| 17% | 9% | Prefer not to answer |
| 14% | 13% | UNDER \$60K |
| 24% | 32% | \$60K TO \$100K |
| 45% | 46% | \$100K + |

Parents

SITUATION IN THE MONTH PRIOR TO THE COVID-19 PANDEMIC

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------|---------------------------------|-------------------------------------|
| 76% | 86% | WORKING |
| 61% | 73% | Working full time |
| 15% | 13% | Working part time |
| 2% | 2% | STUDENT |
| 2% | 2% | Full time student |
| 1% | - | Part time student |
| 10% | 2% | Retired |
| 10% | 7% | Homemaker/stay at home parent |
| 3% | 2% | Unemployed and looking for work |
| 1% | 1% | Unemployed and not looking for work |
| 1% | 1% | Other |

PROVINCE OF RESIDENCE

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------|---------------------------------|-------------------------|
| 17% | 17% | British Columbia |
| 14% | 14% | Alberta |
| 4% | 4% | Saskatchewan |
| 4% | 4% | Manitoba |
| 48% | 48% | Ontario |
| 5% | 5% | English Quebec |
| 3% | 3% | New Brunswick |
| 3% | 3% | Nova Scotia |
| 1% | 1% | Prince Edward Island |
| 2% | 2% | Newfoundland & Labrador |
| 39% | 39% | WEST |
| 53% | 53% | ON/QC |
| 8% | 8% | ATLANTIC |

CHILD IS STUDENT WITH A DISABILITY

| Parents of Current Students | Parents of Prospective Students | |
|-----------------------------|---------------------------------|-----|
| 8% | 8% | Yes |
| 92% | 92% | No |