

IMPACT OF COVID-19 ON STUDY ABROAD TO NORTH AMERICA

MARCH 2020 POLL RESULTS

What impact will the global outbreak of COVID-19 have on Chinese students' plans to study abroad next year? If you are in the study abroad industry like us, this big question has probably been playing on your mind.



This past week (March 20 — March 25th) Vericant tried to understand the situation better by conducting a brief poll of counselors in China who work with students applying to high schools and/or universities in North America. While we did get responses from some counselors who work with students applying to countries other than the US and Canada, due to the limited amount of data, their responses were removed from the results below. Given the number of students our respondents work with, they convey their understanding of the sentiment of anywhere from 2200 to over 4000 families in China.

We are aware that information about the global health situation is changing rapidly, and we plan to continue to run this poll as a series, asking the same or similar questions each time, to continually get an updated, and hopefully more accurate, pulse of our community. We are sharing the results here in the hopes it will help us all better understand the impact COVID-19 has had on students in China so far. **Most notably, we found that 50% of our respondents feel there will be fewer students applying to study abroad for fall 2021 entry compared to the past application year, but most (about 85%) believe the drop will only be between 11-20% or less. Continue reading to see more of our results.**

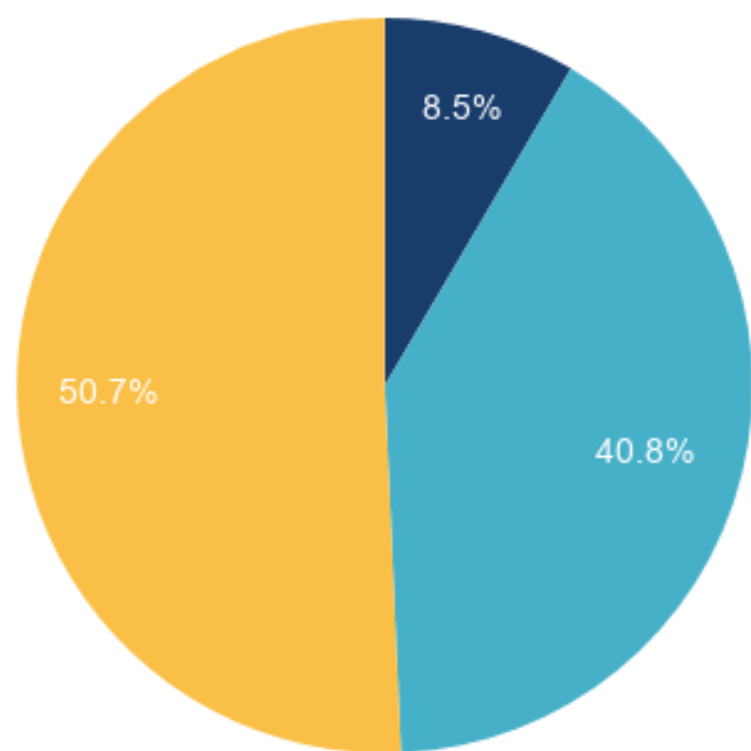


WHO TOOK THIS POLL

There were 71 responses. Given the number of students our respondents work with, they convey their understanding of the sentiment of anywhere from 2200 to over 4000 families in China. 40% of respondents work with only students applying to university in North America, while 50% of respondents work with both students applying to high school and university abroad. Most of our respondents are counselors who either work in schools or work in private education consulting companies/organizations.

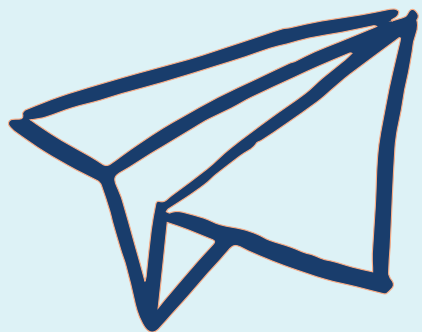
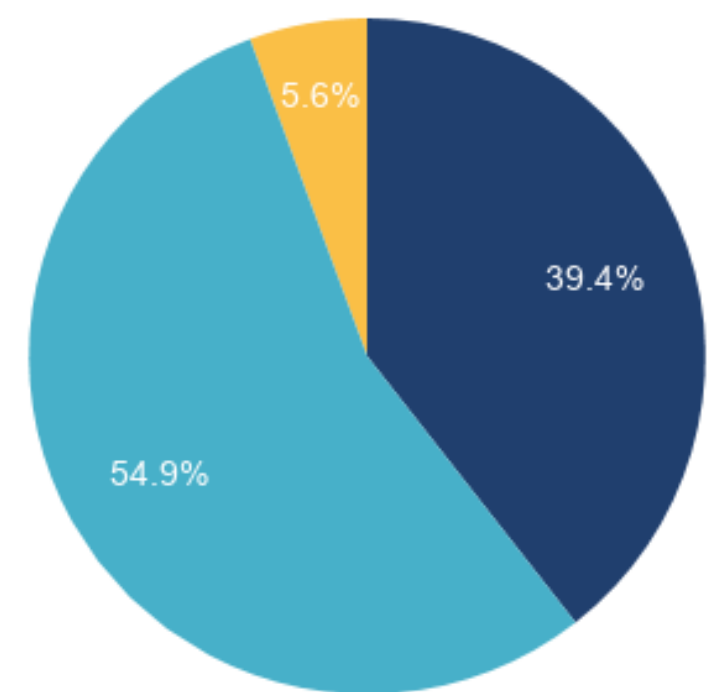
What level of school are your students applying to?

- Applying to high school only
- Applying to university only
- Both



What role do our respondents play in the study abroad process?

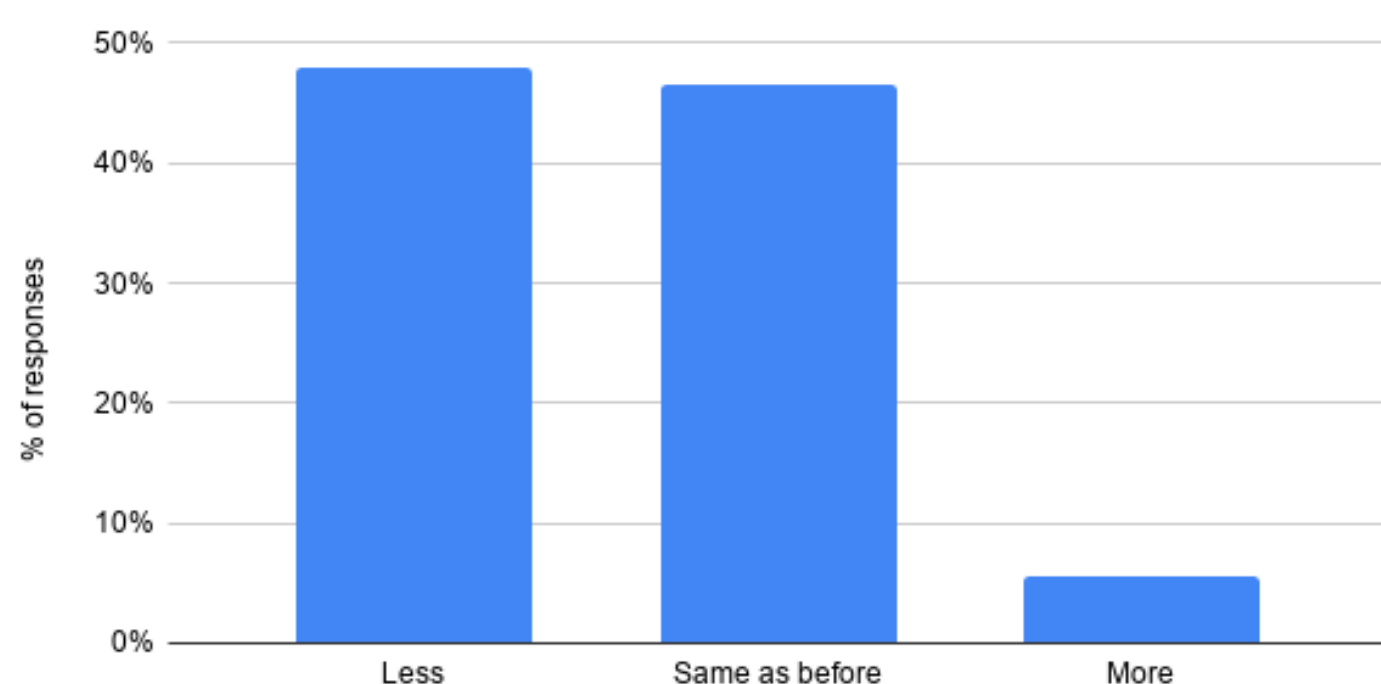
- Counselor at a school
- Consultant/Counselor in an organization
- Other



WHAT IMPACT MIGHT COVID-19 HAVE ON STUDY ABROAD PLANS IN THE NEXT APPLICATION YEAR?

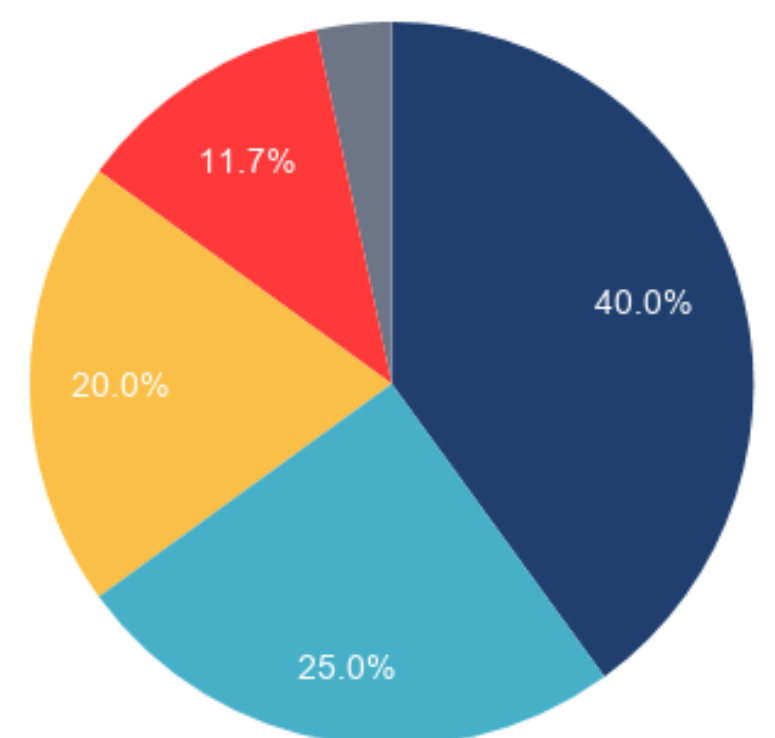
Almost half (48%) of our respondents felt there would be a decrease in applications from China to institutions overseas in the next application cycle. But, on the bright side, 46% of responses felt the application numbers would remain about the same. For this question, there did not seem to be a meaningful difference between those applying to high school and those applying to university. Interestingly, of the 50% that expected a drop in applications, estimates regarding what the drop would be varied quite a bit.

Do you expect more or less of your students will apply to North American schools next year (enter school in 2021)?



What percentage drop in applicants do you expect?

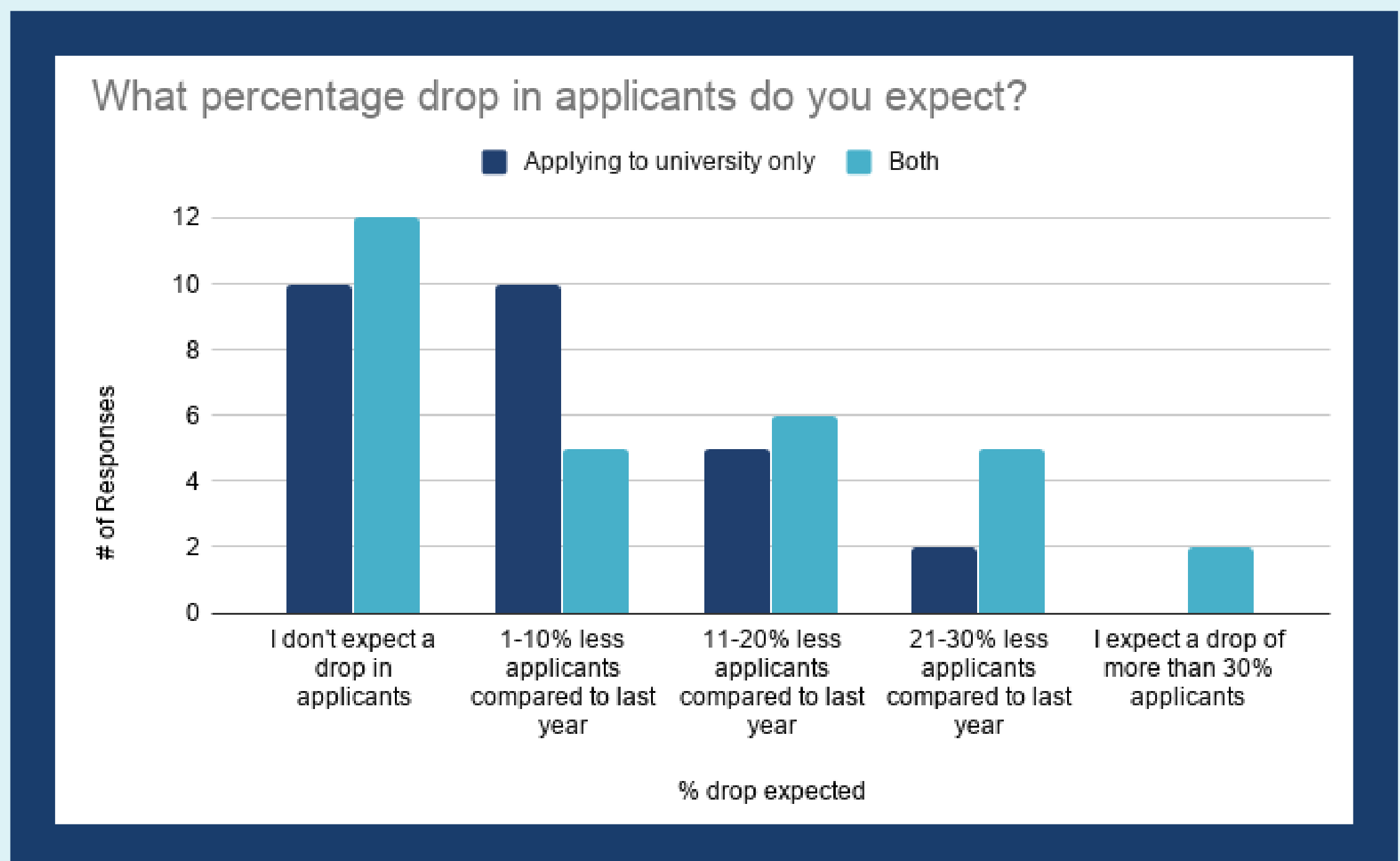
- I don't expect a drop in applicants
- 1-10% less applicants compared to last year
- 11-20% less applicants compared to last year
- 21-30% less applicants compared to last year
- I expect a drop of more than 30% applicants





IMPACT BY SCHOOL LEVEL

When you break down these percentages by respondents who work with only students applying to university versus respondents who work with students who are applying to both high school and university, we see that perhaps there will be a slightly larger expected drop in high school applications, since those who work with both groups tend to anticipate higher percentage drops than those only working with university applicants.



To explain further, we see approximately a third of all the responses said they don't expect a drop at all. Responses from those working with only university applicants mostly indicated that while they do expect a drop, it is mostly a 1-10% drop. Whereas, those who work with university and high school applicants ("Both") generally estimated a larger drop, averaging around the "11-20% less applicants than last year" option.

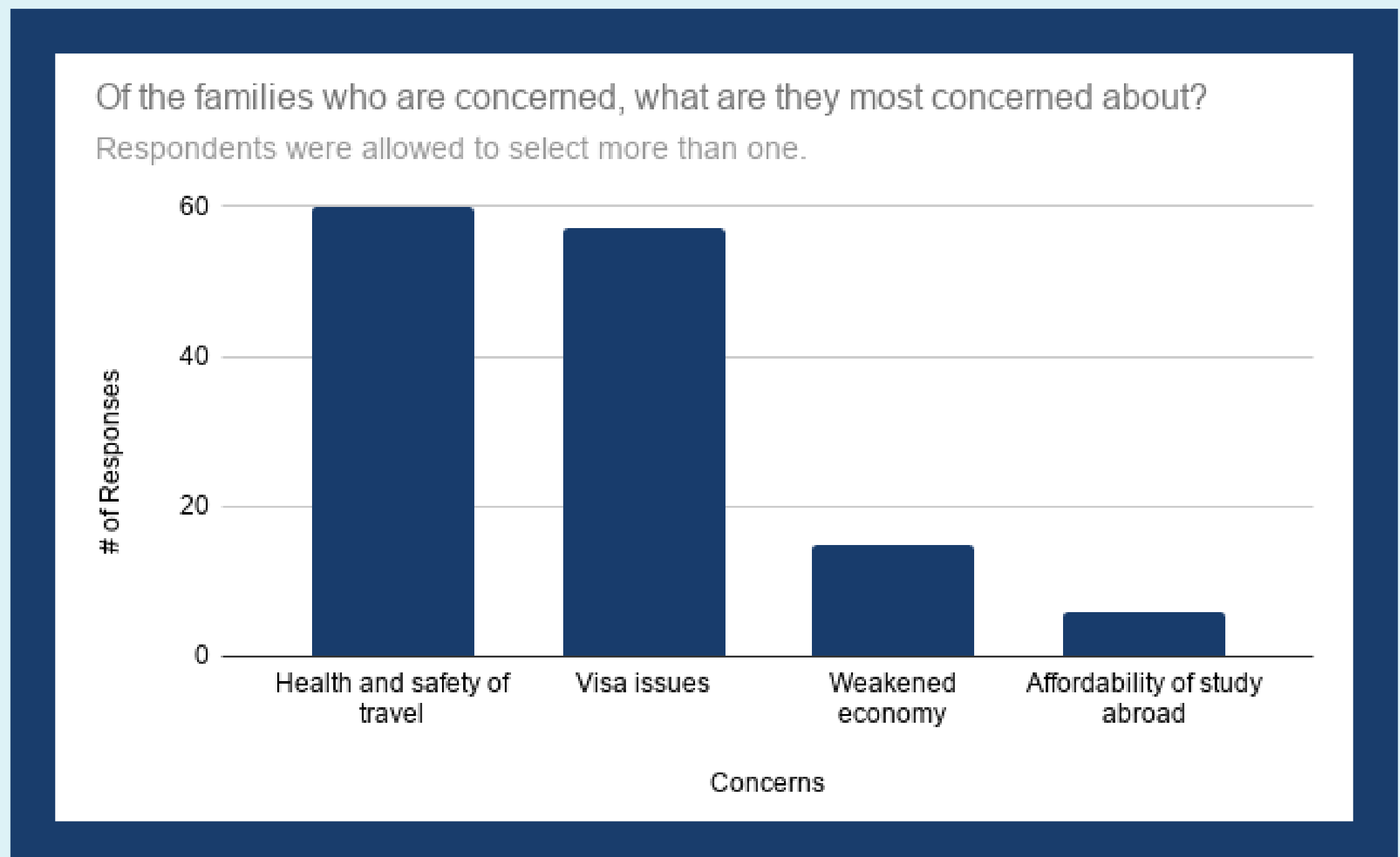
This may be because those working with both high school and university applicants are expecting a drop in their high school applicants and therefore expect an overall drop that is larger than the drop expected by those working with only university applicants. As such, this indicates that the expected drop in high school applicant numbers may be larger than the expected drop in university applicant numbers.

Note: The data from those only working with high school applicants was removed since we only had a small number of responses to this question from this cohort.



CONCERNS ABOUT TRAVEL + VISA ISSUES

Many of the respondents shared that some of the families they work with are concerned about studying abroad next year given the current global health concerns regarding COVID-19. But, 30% of respondents felt that it was only a small number (0-30%) of the families they work with who had these concerns.



Based on the responses to our poll, the most common issue for those families that expressed concern over the current public health situation was the health and safety of travel, followed closely by visa issues. The four options seen below were provided by Vericant to respondents, but we also left a field for respondents to provide any other concerns they had heard from families.

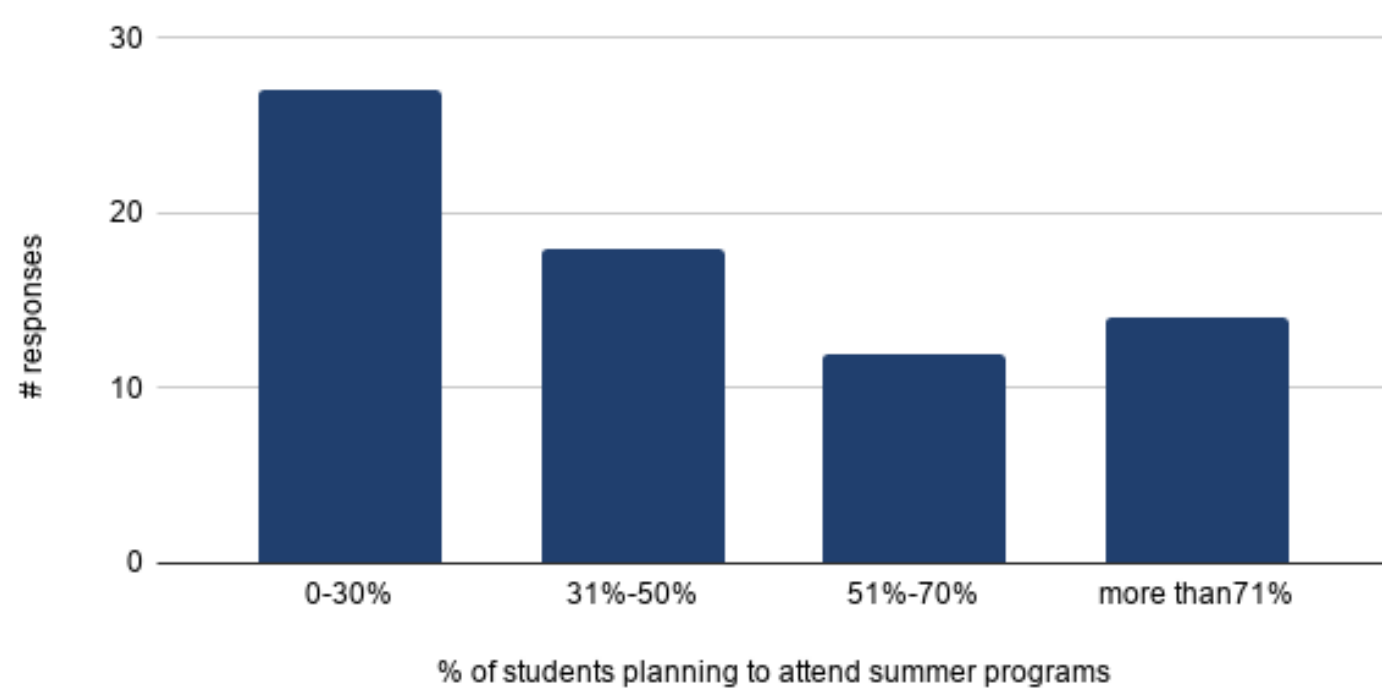
These other concerns shared by respondents included: **"uncertainty about standardized test schedules"**, **"Sino-US relations"**, and **"possible racial prejudice caused by COVID-19"**.



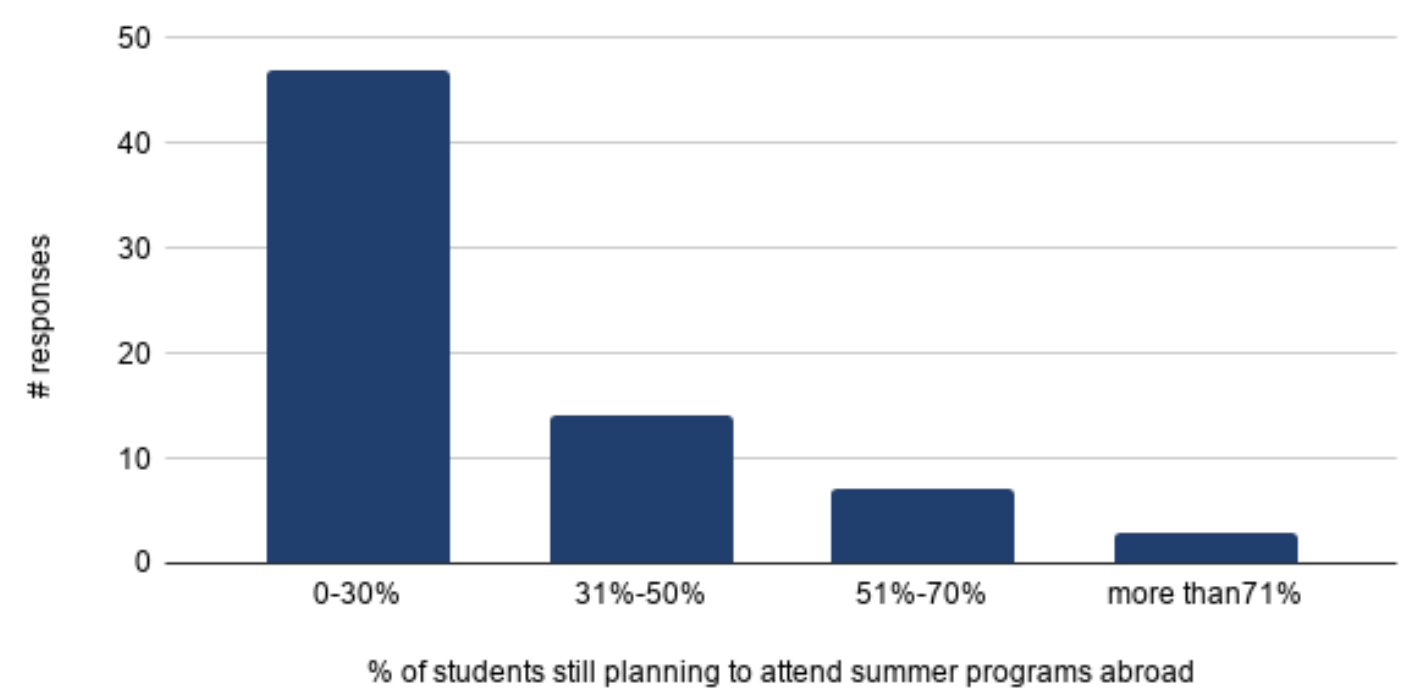
WHAT IMPACT WILL COVID-19 HAVE ON 2020 SUMMER PROGRAM ATTENDANCE FROM CHINA?

Many popular pre-college and pre-high school summer programs have yet to be canceled, but there still seems to be a significant decrease in plans to go abroad this summer.

How many of your students were planning to attend summer programs outside of China in 2020?

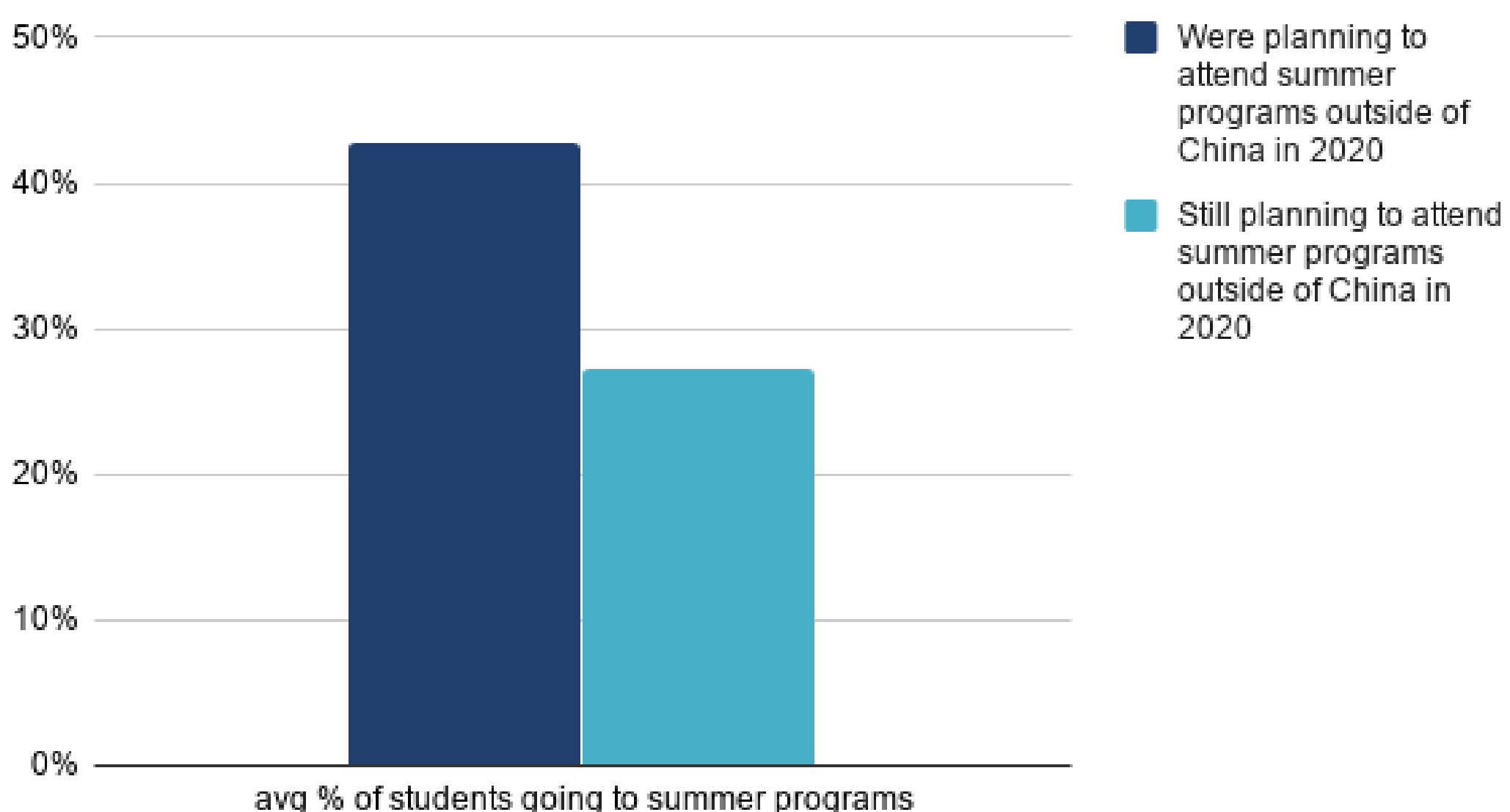


How many of your students still plan to attend summer programs outside of China in 2020?



Respondents estimated an average of 43% of their students were planning on attending programs abroad this summer. Now respondents estimate on average only 27% of their students may still be planning on going to summer programs abroad. This implies an expected possible drop of 36% of students going to summer programs in 2020.

Anticipated drop in summer program attendance



STAY IN TOUCH

We hope you have found this information useful. We would like to continue to collect and share responses regularly to provide you with an updated view of the situation as things continue to change rapidly around the world.

To receive the latest updates, subscribe to our newsletter by visiting vericant.com/newsletter or follow our Wechat Public Account (ID: Vericant_Interview).

If you have any comments, or would like to share additional questions that you didn't see in this poll but would like to know the answer to, please feel free to email us at survey@vericant.com.



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