

STUDENT MONITOR[®]



Selected LEARNING MATERIALS Findings - Fall 2020

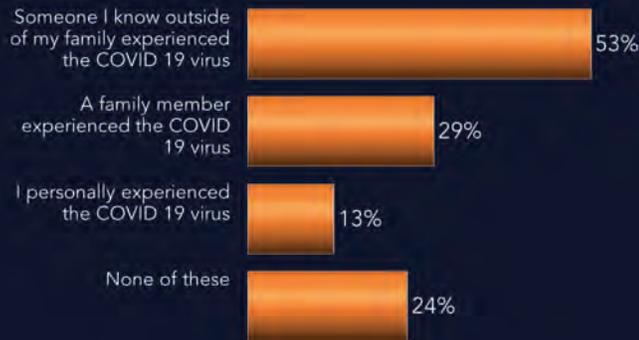
Drawn from the Fall 2020 edition of STUDENT MONITOR's twice annual LIFESTYLE & MEDIA Study, these findings are based on the results of hour-long, one on one, on campus and virtual interviews conducted during the three week beginning October 8th among 1,276 Four Year full time undergrads attending representative colleges and universities throughout the country with a margin of error of +/-2.4%.

The COVID 19 pandemic represents the most significant disruptor to higher education ever seen since the Spring of 1997, 23 years ago, the first edition of STUDENT MONITOR'S Lifestyle & Media market research study was published. The COVID 19 pandemic has unprecedentedly changed where students learn, how they learn, their perception of their college and university and their lives and lifestyles resulting from their respective learning experiences.

- 19% of students enrolled in the Fall 2020 term are attending classes on campus, 35% are full remote learners and 45% are both on campus and remote learners. 49% of on campus learners considered not returning to campus for the Fall 2020 term.
- 66% believe "The federal government could have done a better job of managing the virus".
- 53% agree "I feel more personal stress that I did before the virus".
- Among full or partial remote learners, only 43% are at least "Somewhat satisfied" with remote learning, 23% report their instructors are stricter with grading, 26% easier than usual and 51%, the majority, about the same.
- Among on campus learners, 87% agree "The social aspect of traditional on campus classroom learning is very important to me".
- Among on campus learners, 82% agree "My school has a system of programs in place to protect students from the COVID 19 virus" and 72% agree "My peers could be more conscientious about following my school's programs and policies to protect myself and other from the COVID 19 virus".
- Among full partial remote learners, 66% agree "I'm not receiving the same value with remote learning" and 13% report the cost of tuition and fees were reduced (73% believe the cost of tuition and fees should have been reduced, 22% believe a reduction of more than 30% would have been appropriate).
- Among full and partial remote learners taking a science class, 46% are using 1 or more virtual labs tools (62% believe the virtual lab tool is not realistic, 52% rate the experience not positive).
- Zoom (87%) is the most commonly used app for remote learning, followed by Microsoft Teams (19%) and by an even wider margin, Zoom, 78%, is the one app used most commonly for remote learning followed by Microsoft Teams (9%). 72% of remote learners are satisfied with the one app they use most often.
- The biggest problems on campus are COVID 19, 71%, Stress, 49%, Cost of education, 43%, Student loan debt, 29%, Sexual assault, 21%, Alcohol abuse/binge drinking, also 21%.

Experience With COVID 19

42% have either personally experienced or have a family member who has experienced the COVID 19 virus.



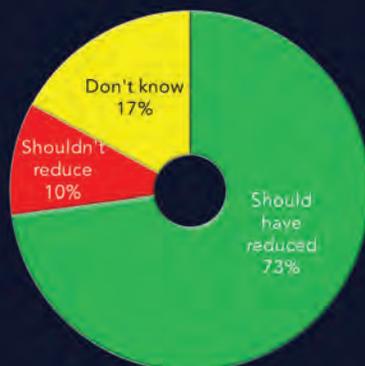
Likelihood Of Not Enrolling In The Fall Term Due To Remote Learning

49% were at least "Somewhat likely" to not enroll in the Fall 2020 term in view of their school's remote learning policy.



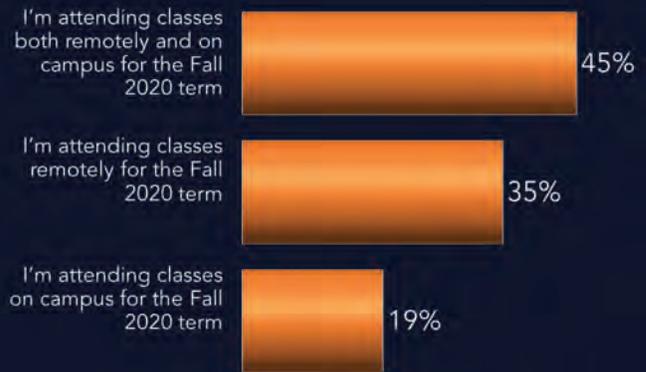
School Should Have Reduced Tuition & Fees In View Of Remote Learning

73% of remote learners believe their school should have reduced the cost of tuition and fees in view of the remote learning policy.



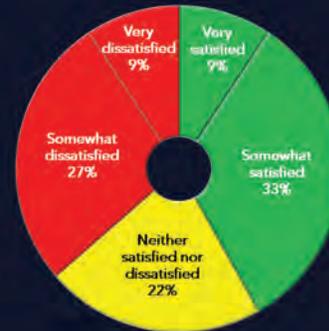
COVID 19 Related Enrollment Status

Only 19% are attending classes on campus for the Fall 2020 term, 81% are attending remotely (full or partial).



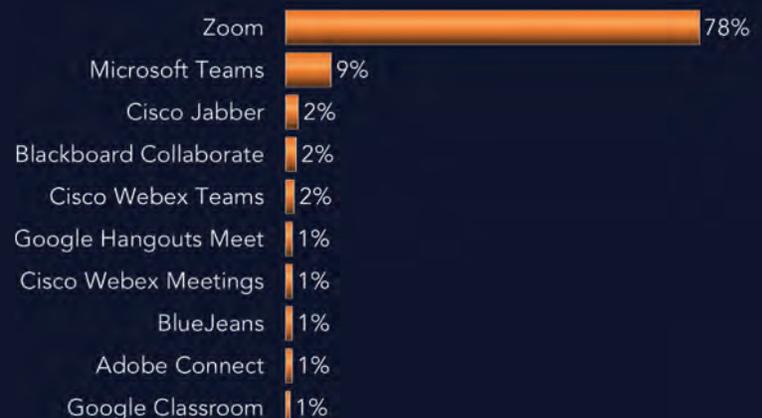
Satisfaction With Remote Learning

Among the 80% attending all or some of their classes remotely, 36% are at least "Somewhat dissatisfied" with their experience.



Apps Used Most Often For Remote Learning

At 78% and again by a wide margin, Zoom is the app used most often for remote learners.

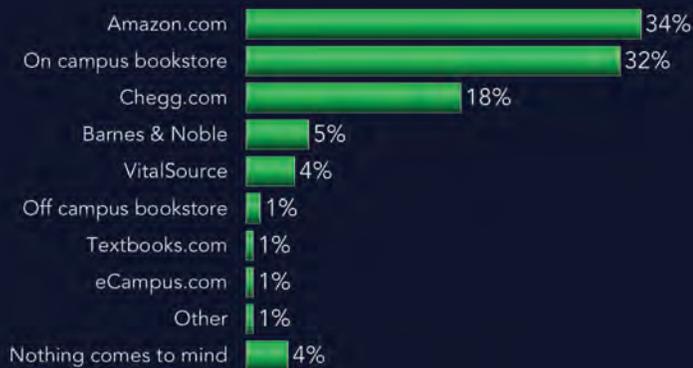


The learning materials category continues to be complex due to;

1. The variety of available formats and rate of learner adoption of each format
2. Fragmented acquisition motivations
3. Shifts in acquisition sources
4. The impact of remote learning resulting from the COVID 19 pandemic

Company Or Place To Purchase Textbooks That Comes To Mind First

When thinking about where to purchase textbooks The on campus bookstore and Amazon are mentioned by virtually equal numbers of learners. About one in six, 18%, mention Chegg.



Company Or Place To Rent Textbooks That Comes To Mind First

More learners mention Amazon than the on campus bookstore when thinking about where to rent, 30% mention Amazon, 26% the on campus bookstore and 24% Chegg.



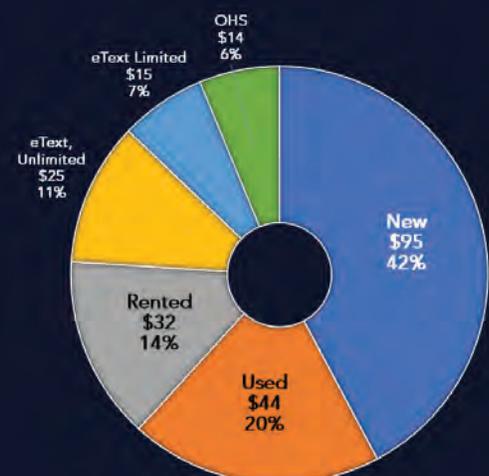
What Students Acquired Learning Materials And How Much They Spent

Fewer than half, 43% purchased 1 or more new textbooks, 35% used and 18% rented 1 or more printed textbooks. 25% purchased an eTextbook for unlimited use, 18% for limited time use. 14% purchased an OHS and an equal number downloaded 1 or more textbooks from a file sharing site.

Spending for textbooks averaged \$300. 42% of spending was for new, 20% used, 14% rented, 11% eTextbooks for unlimited use, 7% for limited use and 6% for OHS.

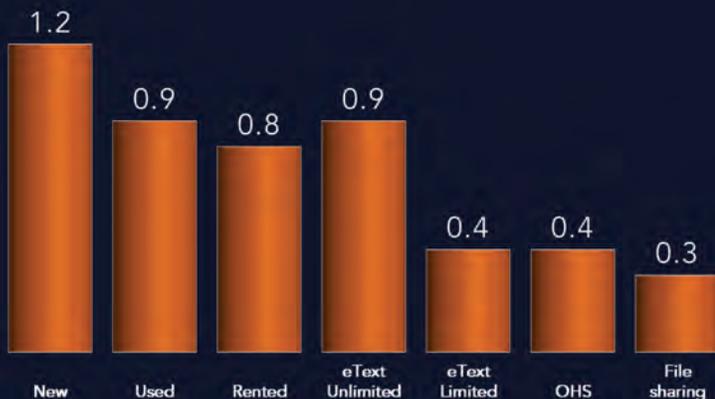


Share Of Spending



Number Of Learning Materials Acquired

The average learner acquired 5.5 Learning materials, 1.2 new, .9 used, .8 rented, .9 eTextbooks for unlimited use, .4 for limited use, downloaded .3 from file sharing sites and acquired .4 OHS.



Share Of Textbooks Acquired Online Or In A Store

57% of textbooks were acquired online, 43% in a store. Down from last year's, 75%, 57% of learning materials were purchased or rented online, 45%, up from 25%, were purchased in a store.

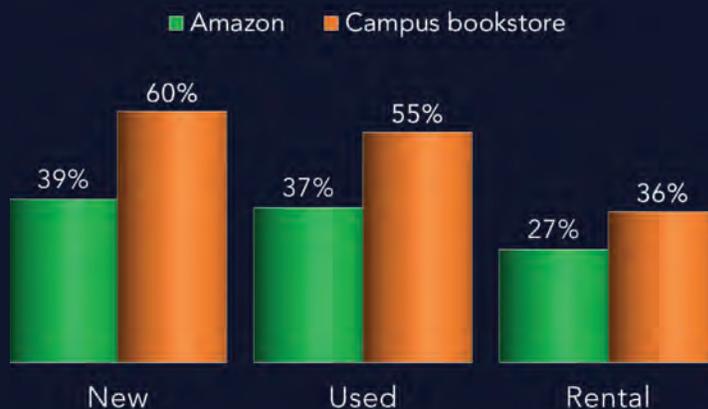


Learners have turned to Amazon as an alternative to their on campus bookstore while more learners purchase or rent printed textbooks from their campus bookstore, large numbers purchase or rent from Amazon.

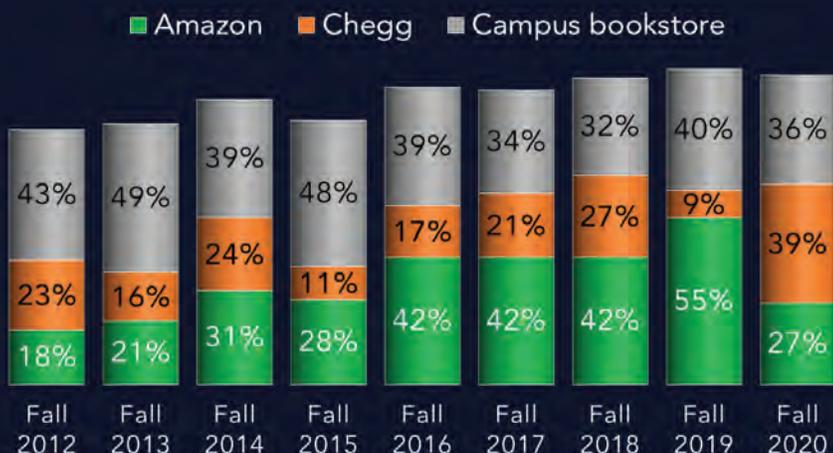
Among renters, 33% more rented from the campus bookstore as Amazon. 60% of new purchasers purchased from the campus bookstore compared to 39% Amazon. 55% of used purchasers purchased from the campus bookstore compared to 37% Amazon.

Since learners typically purchase or rent from more than one source, incidence shares often total more than 100%.

Purchasing Or Renting From Amazon Or Campus Bookstore



Where Students Rented Printed Textbooks



27% of renters rented from Amazon, down sharply from 55% last year, compared to 36% from the campus bookstore, down somewhat from last year's 40%

39% of renters rented from Chegg, representing an all-time high.



Compared to last year, the rate of decline in the number of printed textbooks purchased has reversed. Learners purchased 2.1 new and used textbooks for the Fall 2020 term, up 11% from 1.9 printed textbooks purchased last year.

Number Of New Or Used Printed Textbooks Purchased - Tracking



Consistent with the 11% increase in units purchased, spending for printed textbooks increased 8%. The average student spent \$139 for the 2.1 new and used printed textbooks purchased for the Fall 2020 term.

Spending For New Or Used Printed Textbooks Purchased - Tracking



Share Of Learners Renting 1 Or More Printed Textbooks - Tracking



30% rented at least 1 printed textbook for the Fall 2020 term.

This 30% incidence represents a significant decline compared to the last two years but renting continues to represent an appealing alternative to buying among a meaningful number of learners.

Share Of Learners Planning To Rent Next Term



Less than half are likely to rent at least 1 textbook for the Spring 2021 term.

44% of those who plan to be in school for the Spring 2021 term are "Very likely" or "Somewhat likely" to rent at least 1 printed textbook.

Without exception, we have seen the incidence of learners who plan to rent is consistently more than the 30% the incidence of learners who actually rented.

The 44% incidence is the lowest finding since Fall 2013 and represents a year over year decline for the last 6 years.

Number Of Classes Using OER Materials



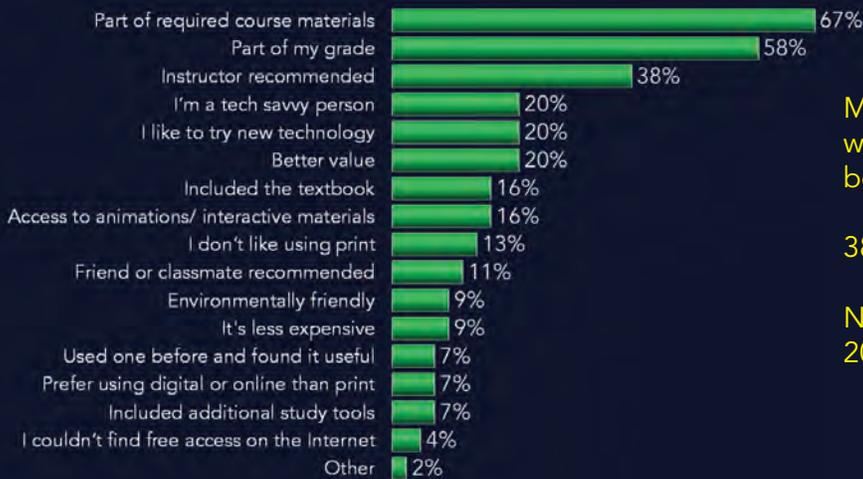
8% of learners report 1 or more of their classes used OER materials. Among this 8%, 50%, report 2 or more of their classes used OER materials.

Number Of Online Homework Solutions Purchased - Fall 2020 Term

Among the 25% of learners who purchased an OHS, the average learner purchased 2.1. 55%, Purchased 1, 30% 2, and the remaining 15% purchased more than 2.0 OHS. Little difference is seen based on gender or year in school.



Reasons For Purchasing OHS



Most purchasers of OHS, 67%, did so because it was Part of required course materials, 58% did so because it was Part of my grade.

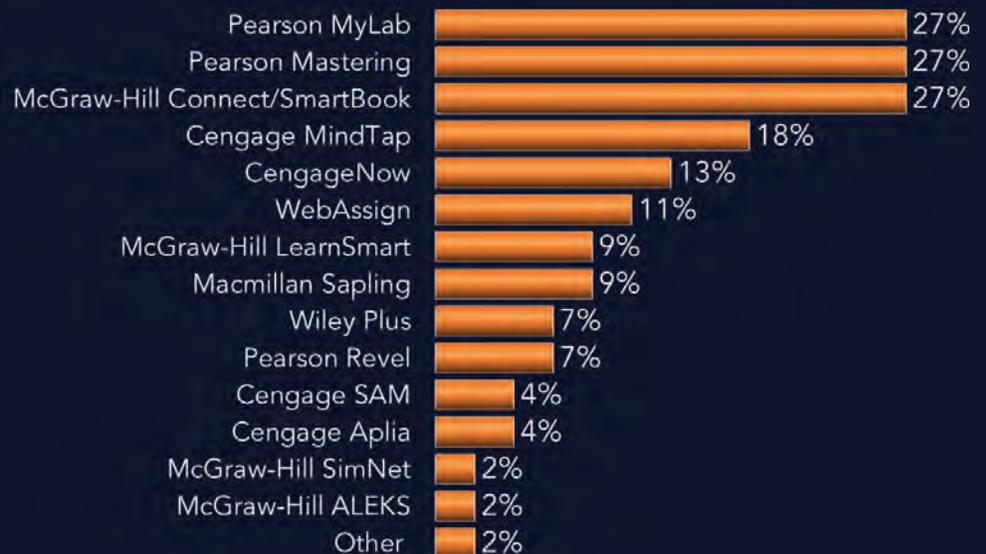
38% mention Instructor recommended.

No other motivation was mentioned by more than 20%.

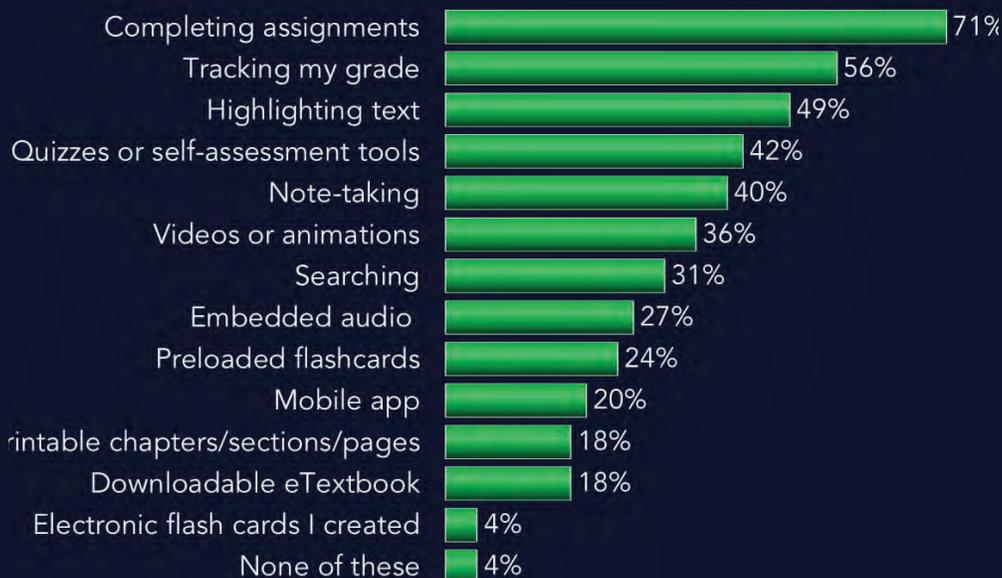
OHS Purchased

Pearson MyLab, Pearson Mastering and McGraw-Hill Connect/Smartbook are the most commonly purchased OHS.

Cengage MindTap follows, mentioned by 18%.



OHS Features Used



Completing assignments, Tracking my grade, Highlighting text and Quizzes or self-assessment tools are the most commonly used OHS features used by students.

71%, and the largest group, report they use their OHS to Complete assignments, 56%, Tracking my grade.



Where OHS Was Purchased



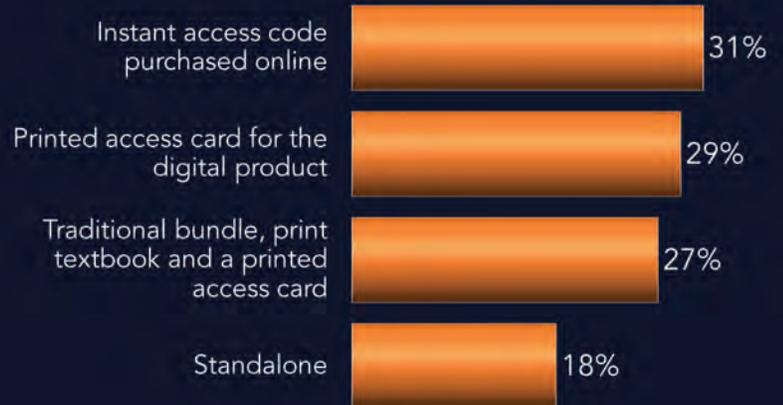
The largest shares of learners who purchased an OHS did so from their on campus bookstore, Pearson MyLab & Mastering or McGraw-Hill Connect/SmartBook.

13% purchased their OHS from Amazon, 11% each from Chegg. 9% mention CengageBrain

How OHS Code Was Purchased

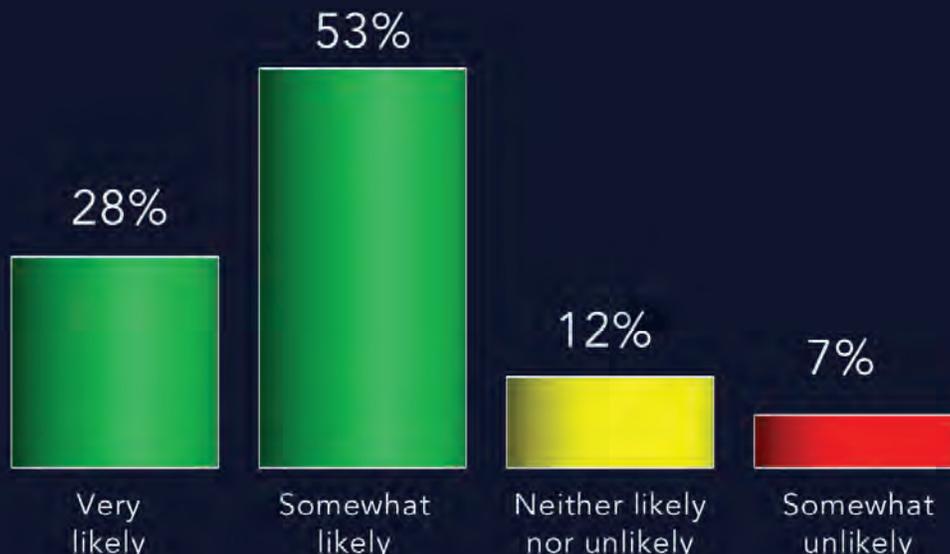
31% of those who acquired an OHS purchased an [Instant access code online](#).

29% cite a [Printed access card for the digital product](#). 27% mention a [Traditional bundle](#) while 18% mention [Standalone](#).

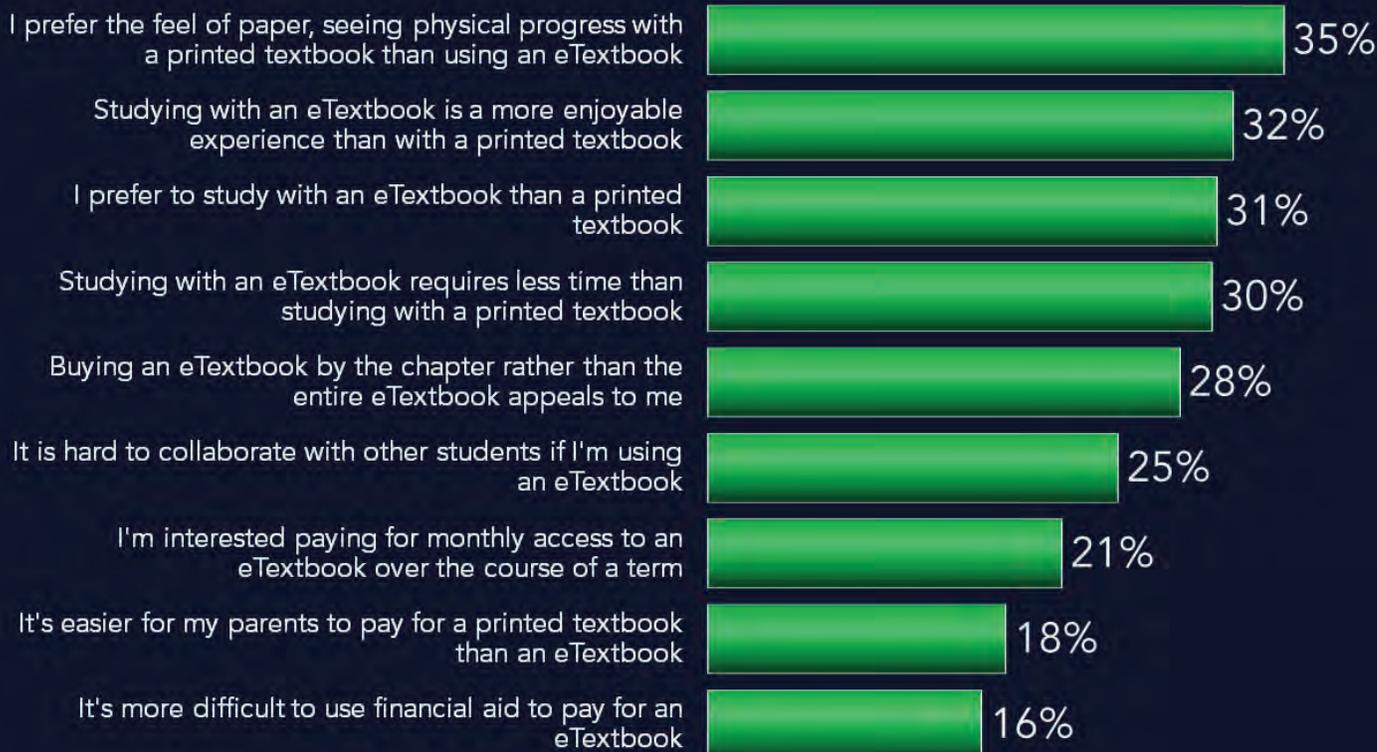


Likelihood Of Purchasing An OHS Next Term (Spring 2021)

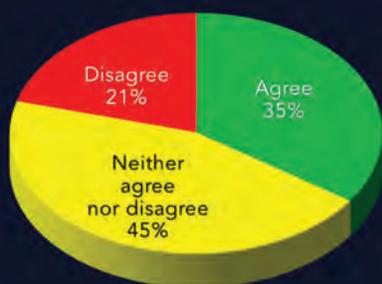
81% are likely to purchase an OHS next term Spring 2021. 28% of those who plan to be in school next term are "Very likely", 53% "Somewhat likely" compared to 7% who are "Somewhat unlikely" to do so. The remaining 12%, and the second smallest share, are uncertain. Consistently, the incidence of learners who plan to purchase is greater than the incidence of learners who actually purchase.



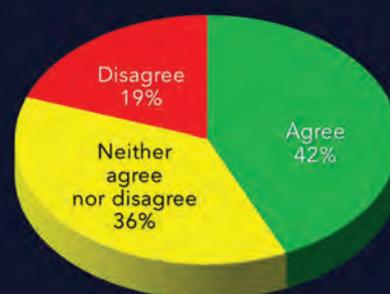
Attitudes about eTextbooks vary widely. 35% "Prefer the feel of paper and seeing physical progress through the material with a printed textbook rather than using an eTextbook", 32% believe "Studying with an eTextbook is a more enjoyable experience than with a printed textbook" while 31% believe "I prefer to study with an eTextbook than a printed textbook".



"I prefer the feel of paper with a print textbook"



"It's valuable to see notes from my instructor included in an eTextbook"



eTextbook Features Used



Quizzes or self-assessment tools, 55%, is the most commonly used eTextbook feature.

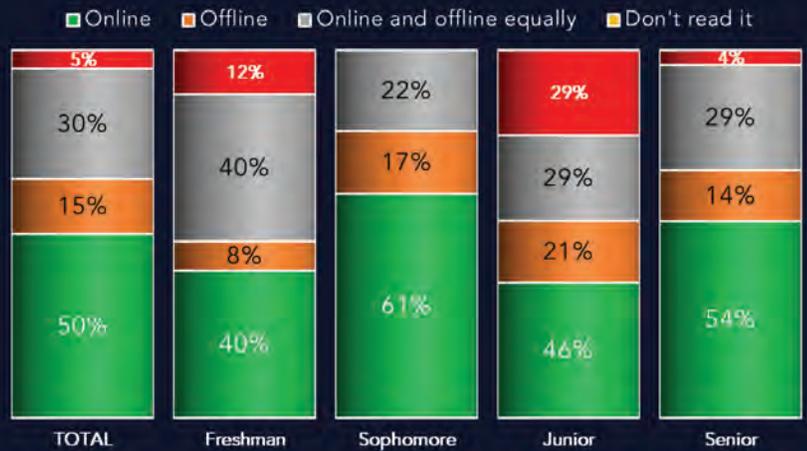
Highlighting, 42%, Note-taking, 33% and Instructor communication, 28% follow.



Preference For Reading An eTextbook

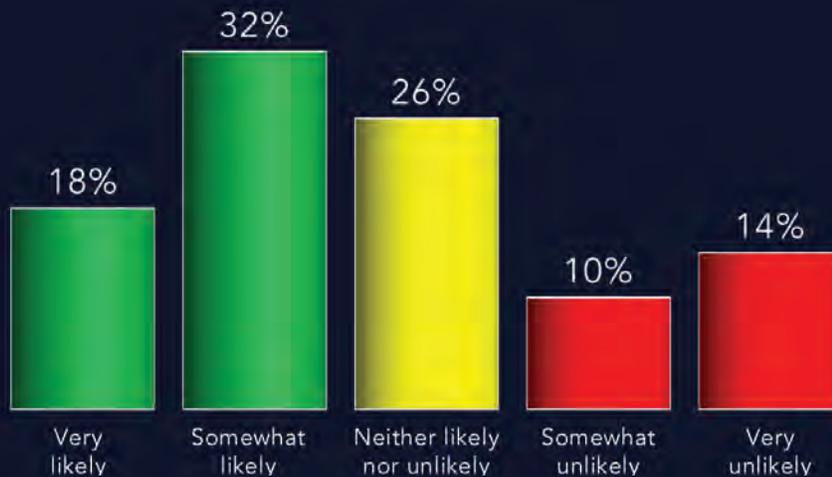
50% prefer to read their eTextbook online, 30% online and offline equally and 15% offline.

The preference for reading an eTextbook online doesn't correlate with year in school ranging from a low of 40% among Freshmen to a high of 61% among Sophomores.



Likelihood Of Purchasing An eTextbook Next Term - Spring 2021

More learners are likely to purchase or rent an eTextbook next term (Spring 2021) as are unlikely. 50% of those who plan to be in school next term are "Very likely" or "Somewhat likely" compared to 24% who are "Very unlikely" or "Somewhat unlikely". Consistently, the incidence of learners who plan to purchase is greater than those who actually purchase. 26%, "Don't know".



Attitude About Studies

Nearly half, 47%, report I always give my all to my studies and try to get a "A" in all of them. 39% report I give my best effort and do well but am satisfied if I don't receive an "A" in all courses. The remaining 13% agree I have so much to do I just need to pass all of my courses.

