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Higher Ed and COVID-19

# National Student Survey

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The purpose of this study is not to gather more data, but better data. To ask the questions that lead to meaningful insight. To help institutions make informed decisions at a time of incredible uncertainty. **Because higher education has never been more critical to the future health, well-being, and success of our country than it is right now.**

We're living in unprecedented times. No one actually knows how this crisis will find its end, but we do know that we can't afford to wait around to find out. It's in times like these that our fidelity to data-driven decision making must be at its highest because there's too much at stake to rely on anecdotal conclusions.

In releasing our survey, we hope to provide colleges and universities insight that will help them enroll and retain their 2020 fall class — but with the caveat that our findings are on a national level. We'd be remiss if we didn't encourage you to do research on your key audiences because every institution is different. In fact, we've spent the entirety of our careers educating the industry about the importance of building a reputation that is authentically differentiated from your peers. Now is a timely reminder that the authenticity of those perceptions are based on asking the right questions to the right audiences.

After all, the ethos of SimpsonScarborough is to follow where the data lead, which — as we all know — starts with asking the right questions.



Yours,  
Elizabeth Johnson  
Chairman, SimpsonScarborough

# Survey Methodology

This study focuses on two critical audiences:

- **High school seniors** who were planning to enroll at a traditional 4-year residential college/university in Fall 2020 prior to March 1, 2020
- **Current college freshmen, sophomores, and juniors** who were enrolled at a traditional 4-year residential college/university prior to March 1, 2020.

Our survey questions were designed to isolate decisions and/or plans being made as a result of the COVID-19 pandemic rather than alternative plans made prior to the pandemic, such as the decision to take a gap year. The questions were direct and actionable, allowing us to derive meaningful insights into the behavior of both audiences.

While this is a national survey that covers a broad and diverse range of students and institution types, we cut the data to look for differences by student demographics and institutional descriptors — we did not find many differences at the high level.\* Understanding that even within small private schools there is a lot of variation, we expect that results would vary at the institutional level.

*This survey was designed so that it could easily be replicated at the institutional level and compared to national trends.*

## Methodology Overview

	High School Seniors	Current Students
Sampling Frame	Current high school juniors and seniors in the U.S. who were planning to attend a 4-year college/university as a residential student prior to COVID-19 outbreak in the US	Current college/university students living in the U.S. (residential students at 4-year college/university only; terminating anyone who was a full-time online student prior to March '20)
Geographic Distribution	<b>National Sample:</b> Equal distribution across Northeast, South, Midwest and West **	
Margin of Error	+/- 4.03%	+/- 4.27%
Completed Surveys	573	513
Data Collection Period	March 25 – March 30, 2020	

\* See pg. 7 page for further secondary analysis commentary.

### \*\* Region Definitions:

Northeast = ME, NH, VT, MA, RI, CT, NY, NJ, PA

Midwest = OH, MI, IN, WI, IL, MN, IA, MO, ND, SD, NE, KA

South = DE, MD, DC, VA, WV, KY, NC, SC, GA, FL, TN, AL, MS, AR, LA, OK, TX

West = MT, WY, CO, NM, ID, UT, AZ, WA, OR, NV, CA, AK, HI

# Profile of Respondents — High School Seniors

School Type	
4-Year <b>Public</b> College/University	<b>74%</b>
4-Year <b>Private</b> College/University	<b>26%</b>

School Type Decided On or Considering	
In-state <b>Public</b> College/University	<b>58%</b>
In-state <b>Private</b> College/University	<b>14%</b>
Out-of-state <b>Public</b> College/Uni.	<b>17%</b>
Out-of-state <b>Private</b> College/Uni.	<b>11%</b>

Gender	
Male	<b>23%</b>
Female	<b>76%</b>
Does not identify with either option	<b>1%</b>
Prefer not to answer	<b>1%</b>

First-Gen	
No	<b>72%</b>
Yes	<b>26%</b>
Don't know	<b>2%</b>

Varsity Athlete	
No	<b>24%</b>
Yes	<b>64%</b>
Don't know	<b>12%</b>

Region (See pg. 4 for definitions)	
Midwest	<b>24%</b>
Northeast	<b>25%</b>
South	<b>26%</b>
West	<b>26%</b>

Race/Ethnicity	
Hispanic/Latino	<b>23%</b>
American Indian/Native Alaskan	<b>3%</b>
Asian	<b>11%</b>
Black or African American	<b>19%</b>
Hawaiian/Pacific Islander	<b>2%</b>
White	<b>62%</b>
Other (please specify):	<b>8%</b>
Prefer not to answer	<b>4%</b>

Still planning to enroll at a traditional, 4-year college or university this fall	
Yes	<b>89%</b>
No	<b>11%</b>

Already decided which college/ university attending this fall	
Yes	<b>74%</b>
No	<b>26%</b>

(Decided) School Region	
Midwest	<b>24%</b>
Northeast	<b>29%</b>
South	<b>25%</b>
West	<b>22%</b>

# Profile of Respondents — College Students

School Type	Gender	Home Region (See pg. 4 for definitions)	School Region (See pg. 4 for definitions)
4-Year <b>Public</b> College/University	Male	Midwest	Midwest
4-Year <b>Private</b> College/University	Female	Northeast	Northeast
	Does not identify with either option	South	South
	Prefer not to answer	West	West
			Prefer not to answer/left blank
School Type	First-Gen	Race/Ethnicity	
In-state <b>Public</b> College/University	No	Hispanic/Latino	
In-state <b>Private</b> College/University	Yes	American Indian/Native Alaskan	
Out-of-state <b>Public</b> College/Uni.		Asian	
Out-of-state <b>Private</b> College/Uni.		Black or African American	
		Hawaiian/Pacific Islander	
		White	
		Other (please specify):	
		Prefer not to answer	
Year	Varsity Athlete		
College/University <b>Freshman</b>	No		
College/University <b>Sophomore</b>	Yes		
College/University <b>Junior</b>			

# Secondary Analysis

We analyzed the data to look for differences by institutional and student characteristics to determine if COVID-19 is having a greater impact on certain types of students and institutions.

To the right is a summary of the variables used for secondary analysis thus far, and we will continue to share information as we conduct further analysis. **Surprisingly, we found few meaningful differences by student or institutional characteristics.**

## High School Seniors

Grade Point Average
Home Region (Northeast, South, Midwest, West)
Family Financially Impacted by COVID-19
Planned Participation in College Athletics
Political Leaning
Decided/Likely School (Public vs. Private)
Decided/Likely School Location (In- vs. Out-of-State)
First-Generation College Student

**No substantive differences for either high school seniors or college students for the following variables:**

School Type (Public vs Private)
School Location (In-State vs Out-of-State)
Grade Point Average
Family Financially Impacted by COVID-19
College Athlete
Political Leaning
First-Generation College Student

## College Freshmen, Sophomores, Juniors

School Type (Public vs Private)
School Location (In-State vs Out-of-State)
Grade Point Average
Home Region (Northeast, South, Midwest, West)
School Region (Northeast, South, Midwest, West)
Family Financially Impacted by COVID-19
College Athlete
Political Leaning
First-Generation College Student

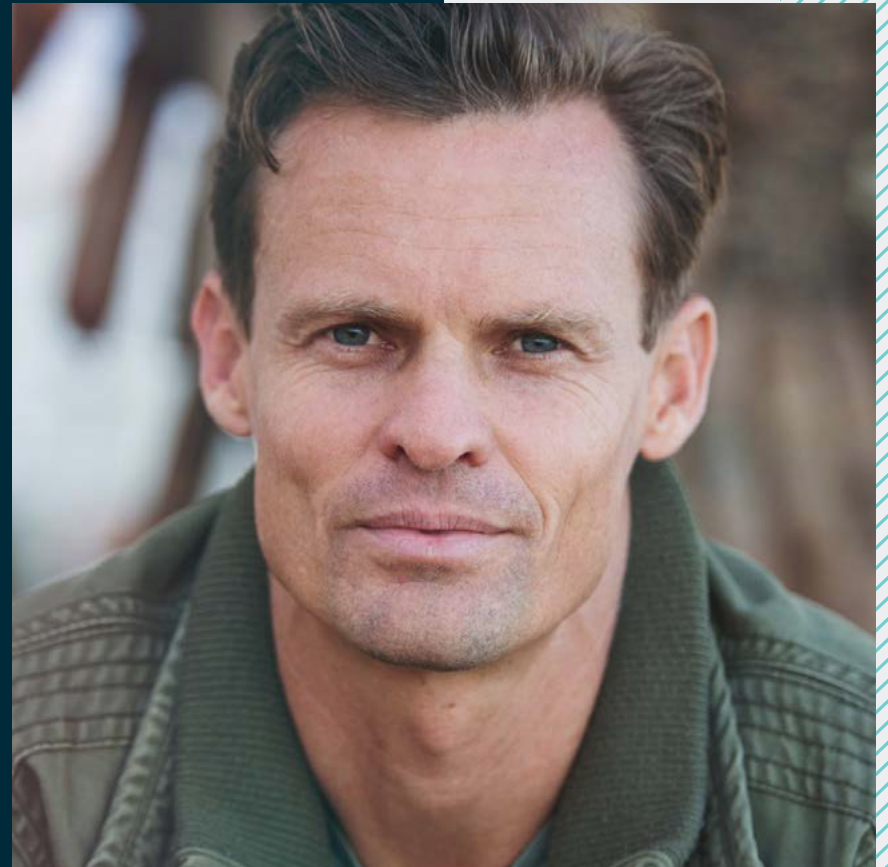
We did find some minor differences by region (school and home location) — **with students living or attending school in the West or the Northeast** reporting greater impact of COVID-19 on future educational plans and perceptions of the school’s response to COVID-19. But these differences were in strength of response, rather than in an opposing view.

1

# Financial Impact on Families

Just three weeks into the COVID-19 outbreak in the U.S., half of high school seniors and college students say their family's financial situation has been affected by the pandemic.

At the time we began fielding this survey, approximately 3 million unemployment claims had been made in the wake of COVID-19. Just two days after we closed the survey, that number had reached nearly 10 million.

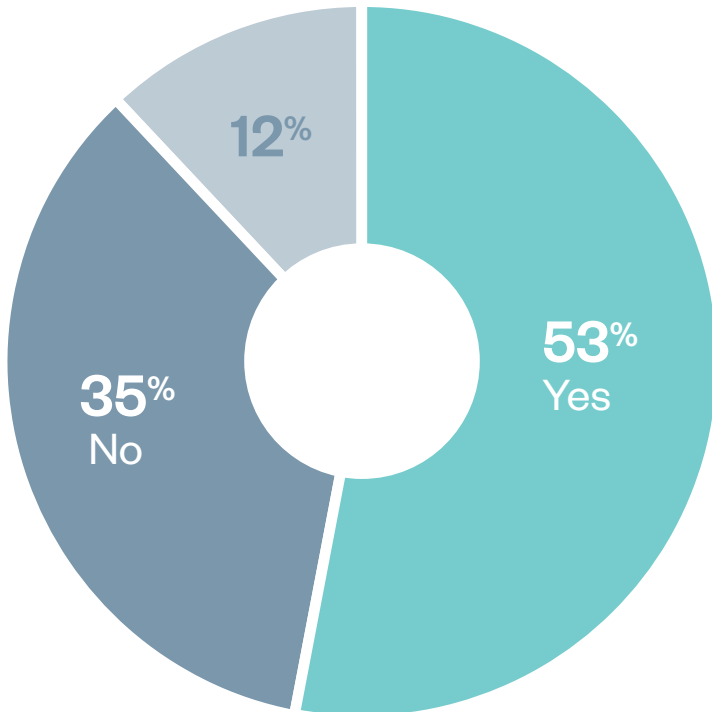




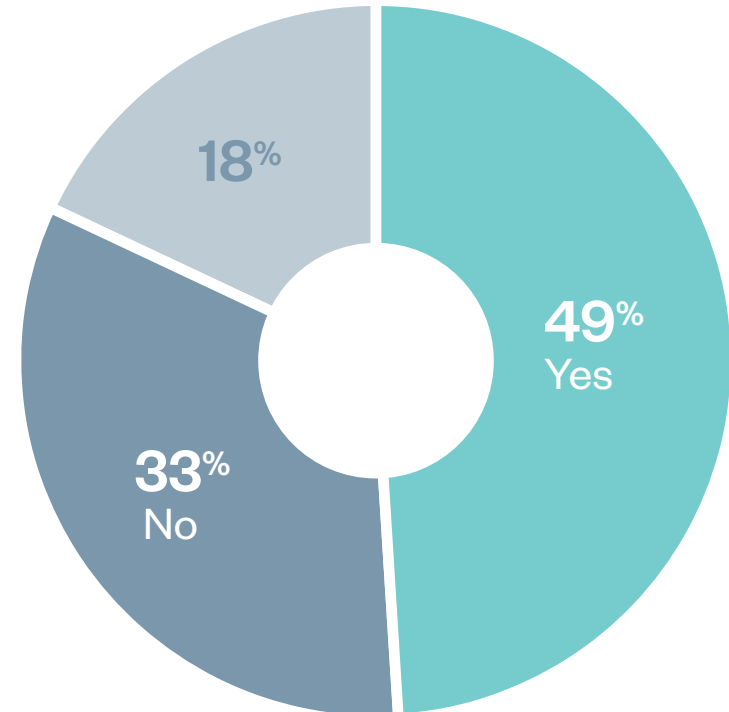
# Is your family's financial situation being affected by COVID-19?



High School Seniors



Current College Students



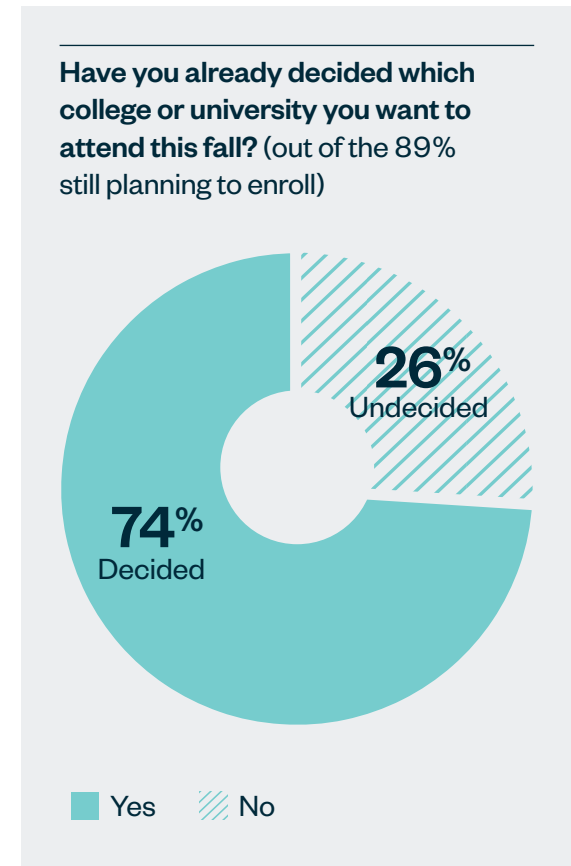
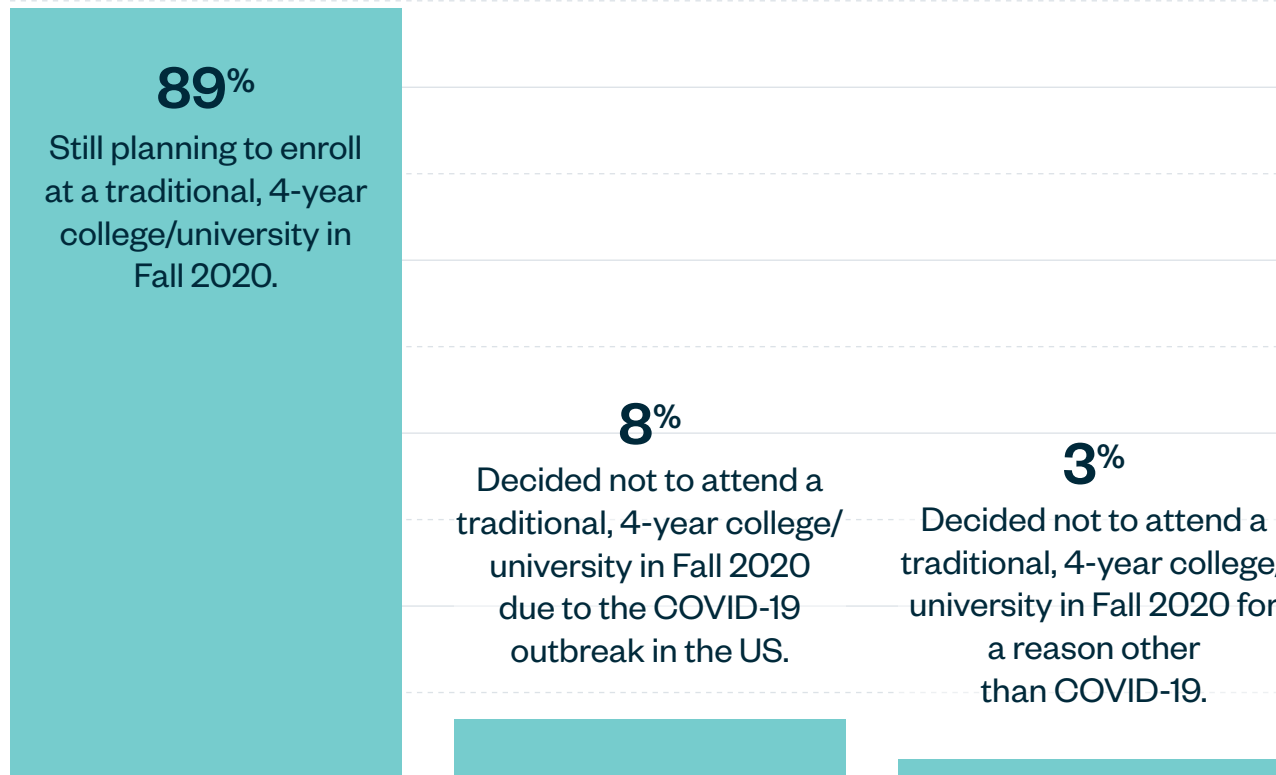
2

# High School Seniors

We surveyed high school seniors who, prior to COVID-19, were planning to enroll at a traditional 4-year college or university in the fall. **While 4 out of 5 still currently plan to enroll, that number is likely to decrease as the financial fallout continues to affect more families in the U.S.**



# Current plans for high school seniors who — prior to COVID-19 — were planning to enroll at a traditional 4-year residential college or university in the fall.



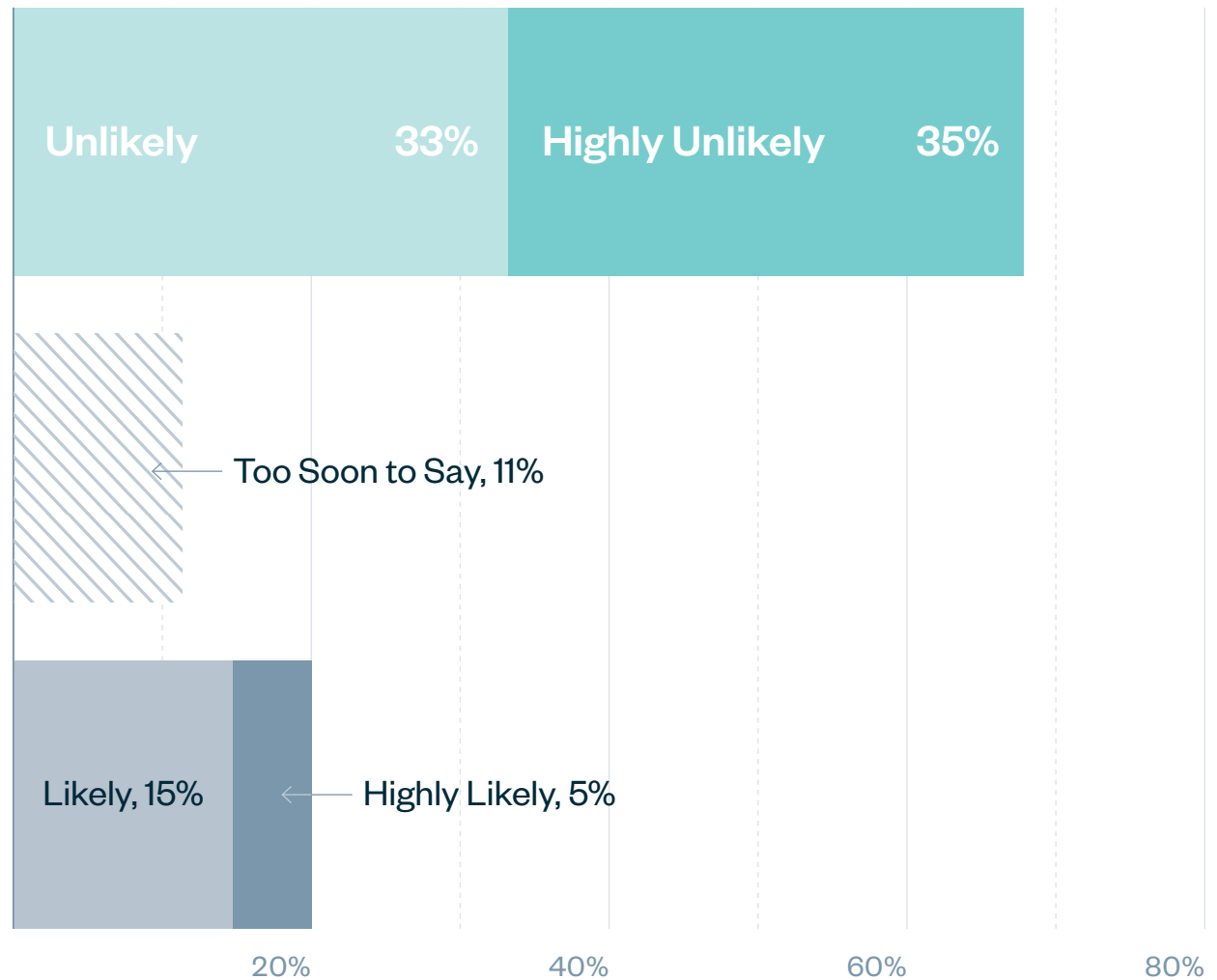
# Possibility of Not Enrolling

1 in 5 high school seniors believe they are **likely NOT to attend** college next term because of the COVID-19 outbreak.

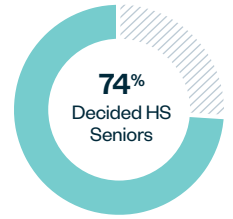
While nearly 7 in 10 believe it is **unlikely they will NOT attend** next term, it doesn't mean COVID-19 isn't influencing their decision process.

**20%** of high school seniors say it is likely/highly likely they will NOT be going to college next term.

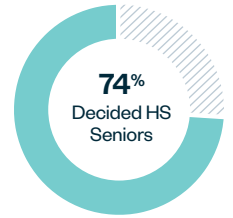
How likely is it that you will NOT go to college next term because of the COVID-19 outbreak?



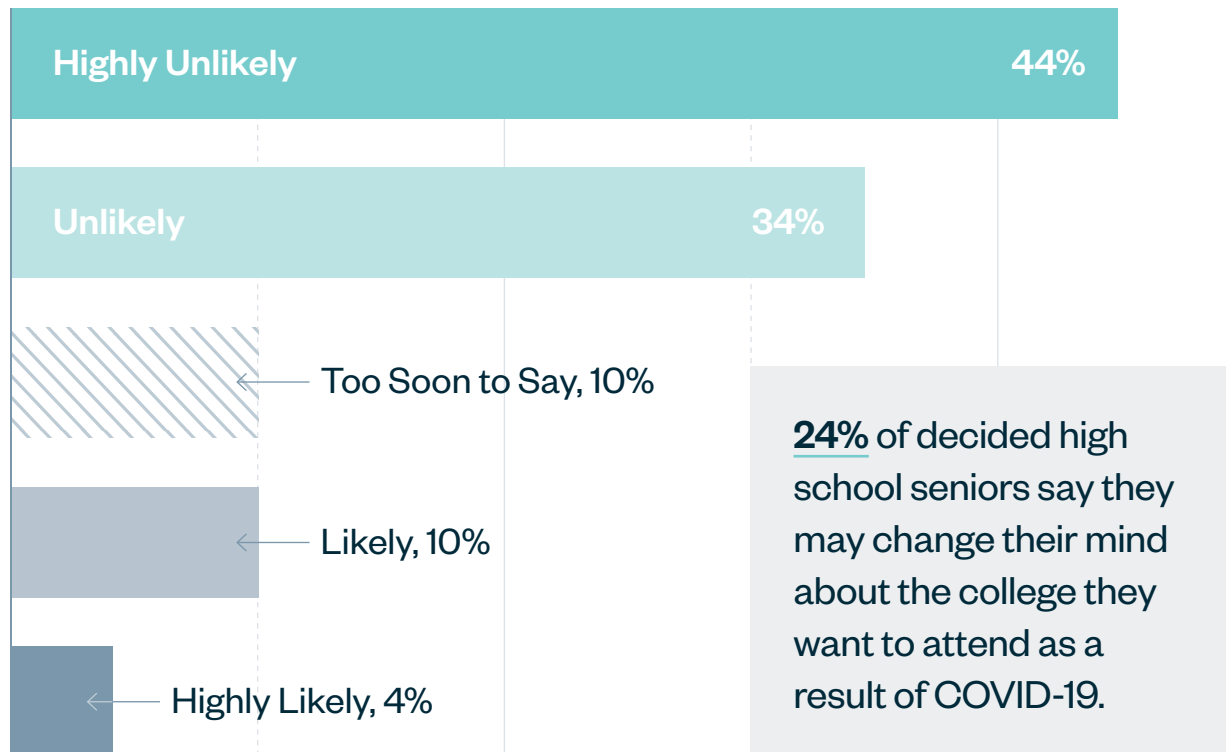
# 1 in 4 decided high school seniors say their college choice has been affected by COVID-19.



# Decided high school seniors and the impact of COVID-19 on their college choice.



How likely are you to change your mind about the college you want to attend as a result of the COVID-19 outbreak?

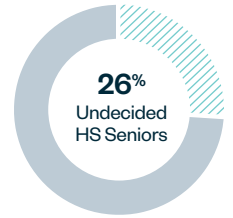


## Decided High School Seniors

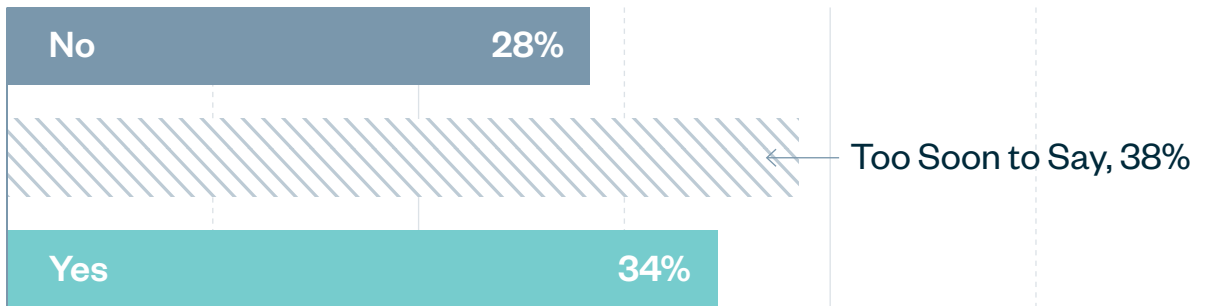
Decided high school seniors **whose decision hasn't yet been influenced** by COVID-19 outbreak are hesitant to accept the possibility their plans may need to change.

As the crisis continues to develop, we expect that more decisions will be affected.

# Undecided high school seniors and the impact of COVID-19 on their college choice.



Is the COVID-19 outbreak influencing your college choice in any way?



Has your top choice college changed as a result of the COVID-19 outbreak?



## Undecided High School Seniors

Those who have not already decided on a school are **more uncertain** about how the COVID-19 outbreak will influence their college choice.

**1 in 2** undecided high school seniors say their top choice college hasn't changed as the result of COVID-19 outbreak, but **3 in 4** say they are taking COVID-19 into consideration as they continue their college decision process.

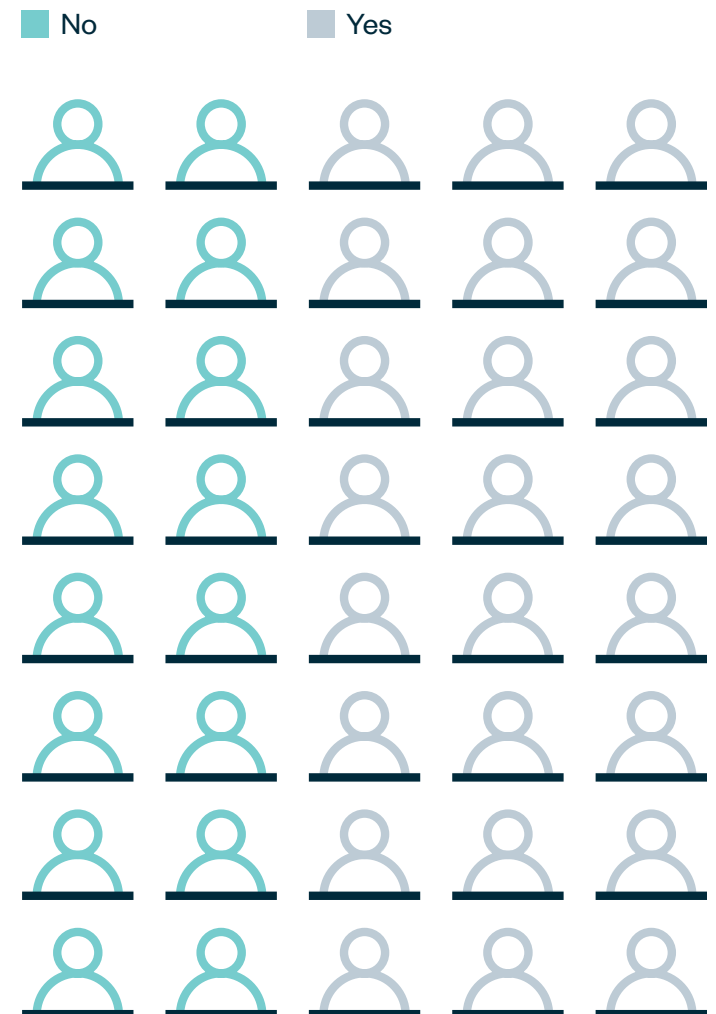
# 40% of the high school seniors who have already decided on a school for Fall 2020 say they are not receiving adequate information about how COVID-19 may affect their enrollment.

The importance of communication with prospective students can't be overlooked in a time of crisis. Prospects don't have the same level of connection or sense of belonging to the institution compared with current students.

Typically we hear prospective students saying that they receive too much communication from colleges and universities they are considering. It's incredibly rare to see prospects asking for more information than they are currently getting.

In these uncertain times, high school seniors need special attention and many don't feel they are getting **the attention they need.**

Are you receiving adequate information about how COVID-19 may affect your enrollment from the college/university you chose to attend?

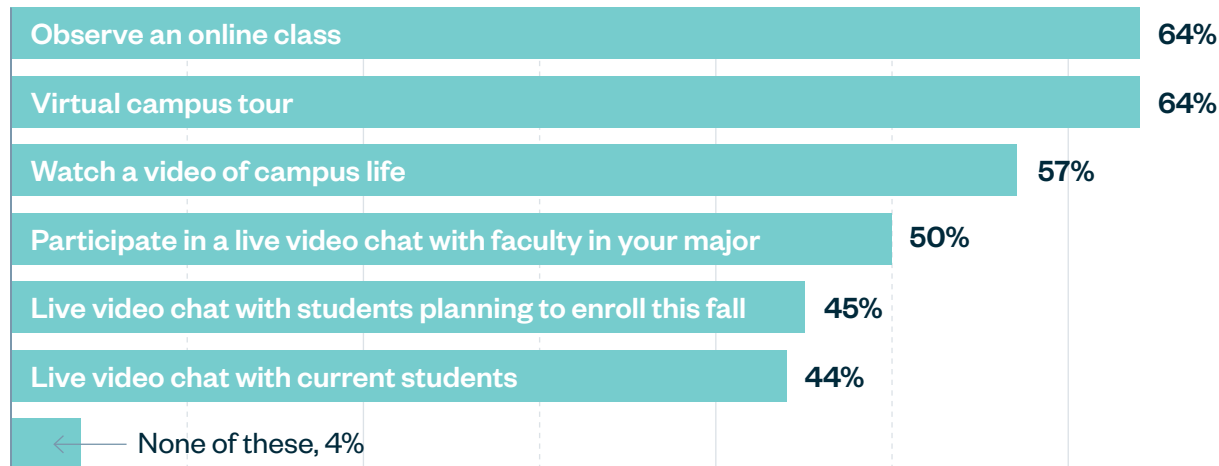




## High school seniors and their preferred ways to engage with colleges.

High school seniors are already used to making connections with their peers through existing social channels. **What they want from schools is a window into what attending that institution will actually be like — both the physical campus and the classroom experience.**

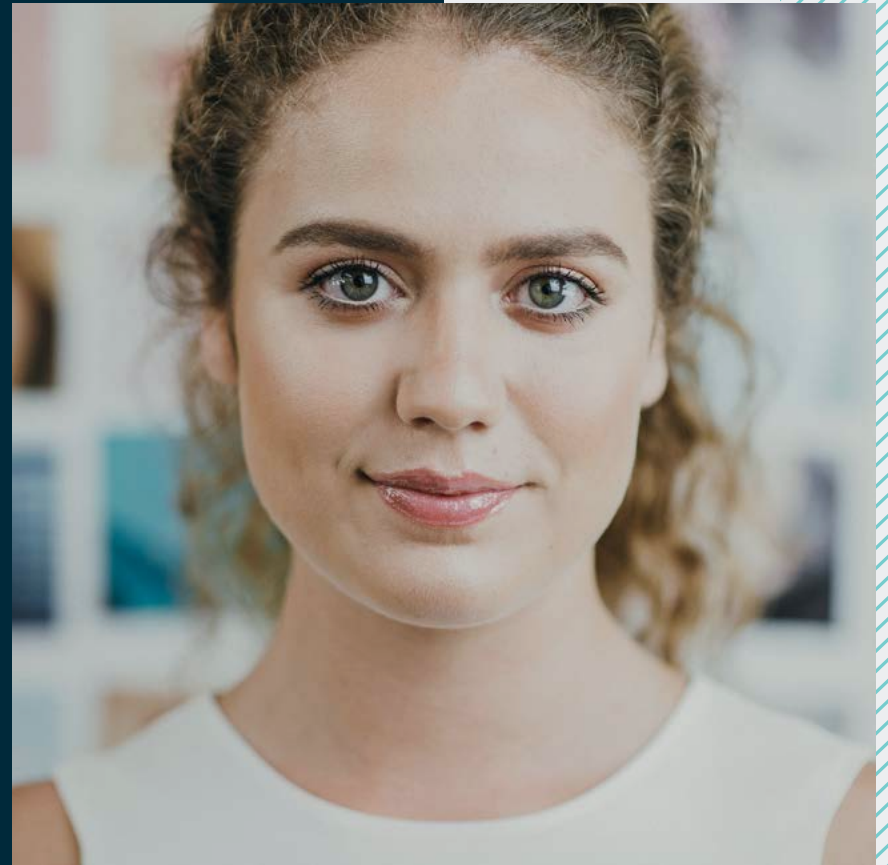
Which of the following would you participate in if offered by the college you plan to attend or are considering attending?



3

# College Students

Students' feelings of anger are starting to be replaced by feelings of sadness and disappointment. While they don't blame their school for COVID-19, the current situation does have an impact on perceptions of their school.



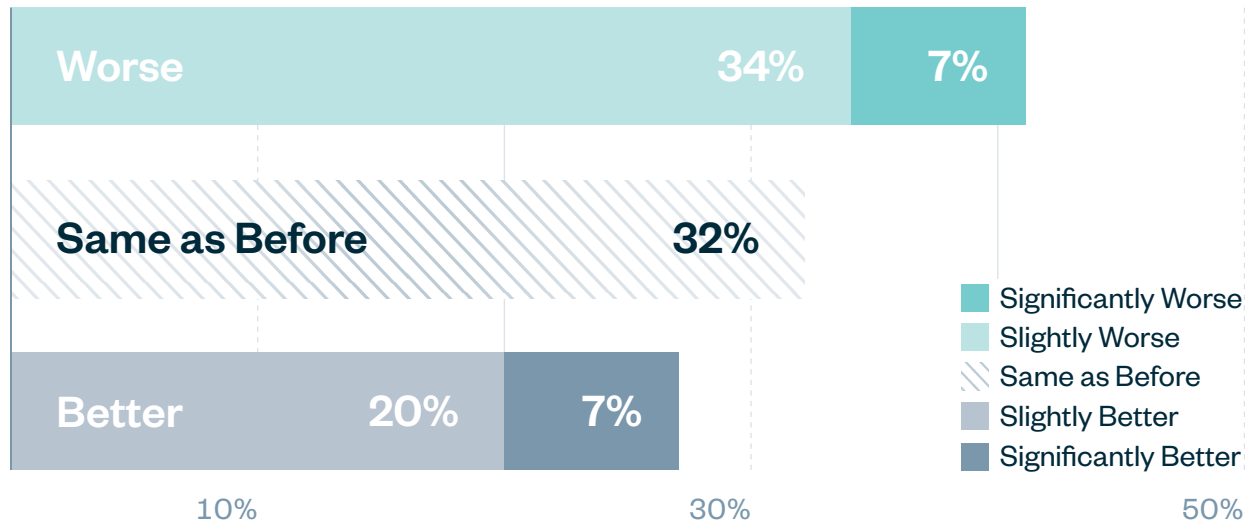


# College students and their changing opinions about their school since the COVID-19 outbreak.

41% of college students say their opinion of their current school has gotten worse as the result of COVID-19.

Honest communication and responsive decision-making will be critical in the months ahead as students navigate the challenges of this new reality. Schools that fail to lead with empathy will have a much more difficult path in preventing these negative perceptions from codifying.

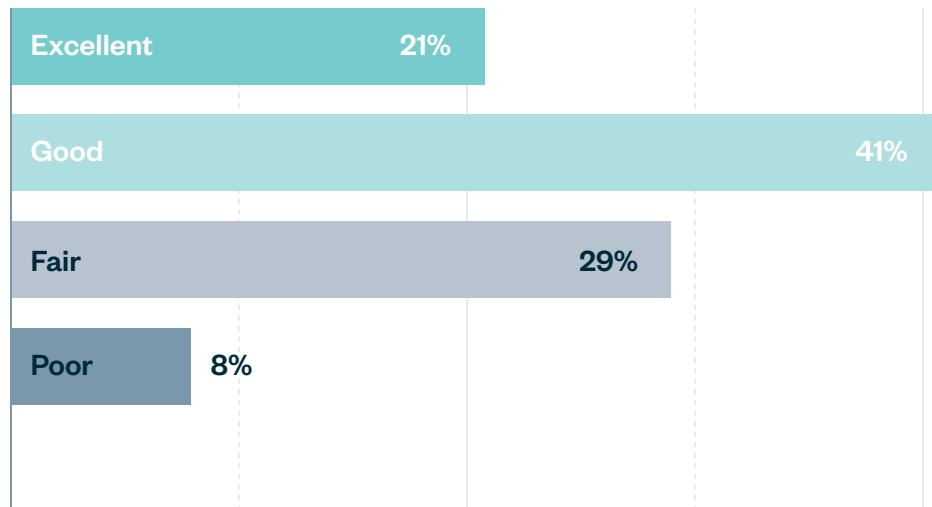
How has your opinion of your school changed since the outbreak of COVID-19 in the US?



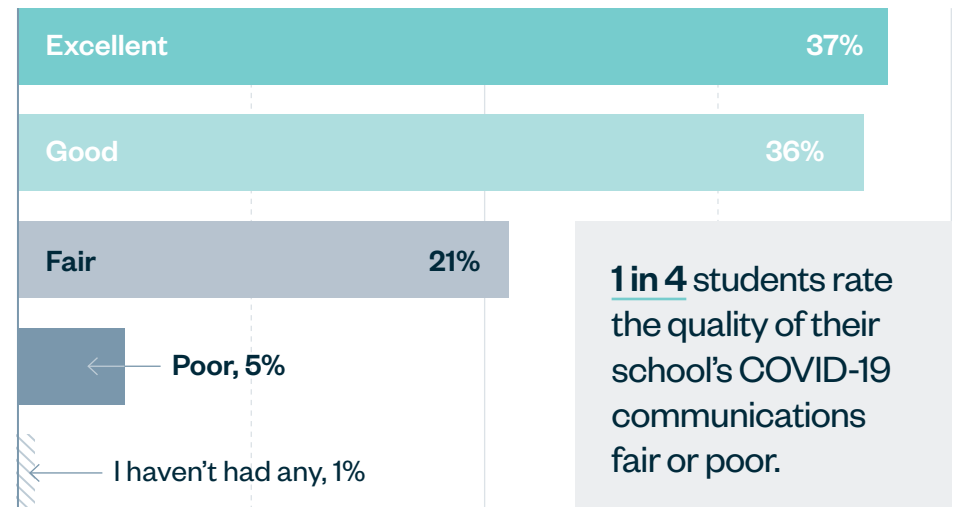
# College students and perceptions of their school’s COVID-19 response and communications.

Students rate their institution’s COVID communications more positively than the overall job the institution has done in response to the crisis. This disparity may be a reflection of the move to online instruction, their handling of on-campus residency issues, or a number of other contributing factors. However, the importance of honest communications isn’t yet in the rearview mirror — it’s critical for schools to continue to respond quickly and communicate effectively with their students as the outbreak continues, and students consider their future education plans.

How do you feel your college or university is handling the COVID-19 outbreak?



How would you rate your college/university’s communication with you about COVID-19?

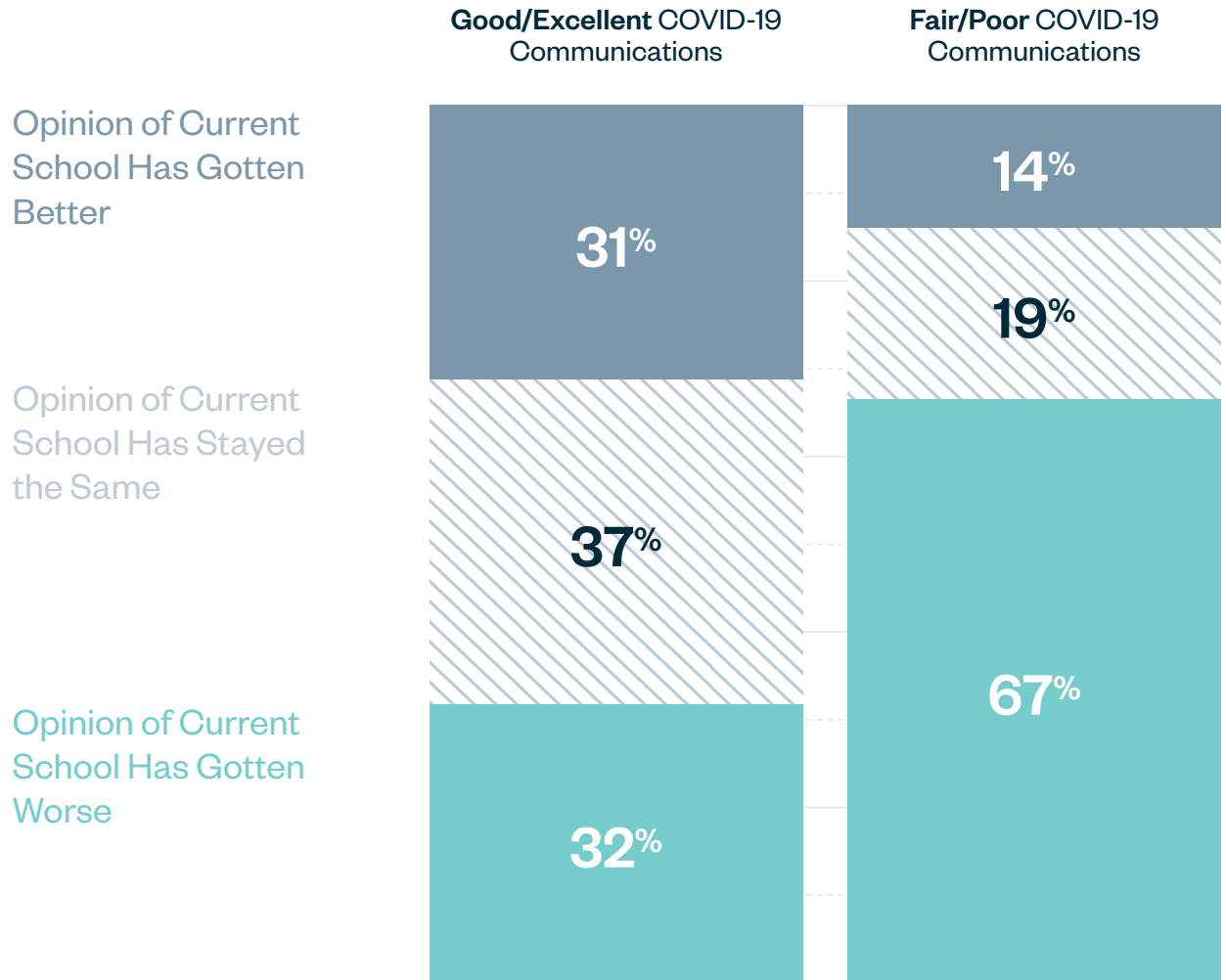


# COVID-19 communications quality and the changing perceptions of current school.

Students are judging schools on the quality of their responses to COVID-19.

Poor COVID-19 communications account for a large percentage of students who say their opinion of their current school has gotten worse. Still, there is a significant segment of students whose opinion of their institution has declined despite reporting that their school has done a good job communicating with them about COVID-19.

Change in Opinion by School's COVID-19 Communications Rating

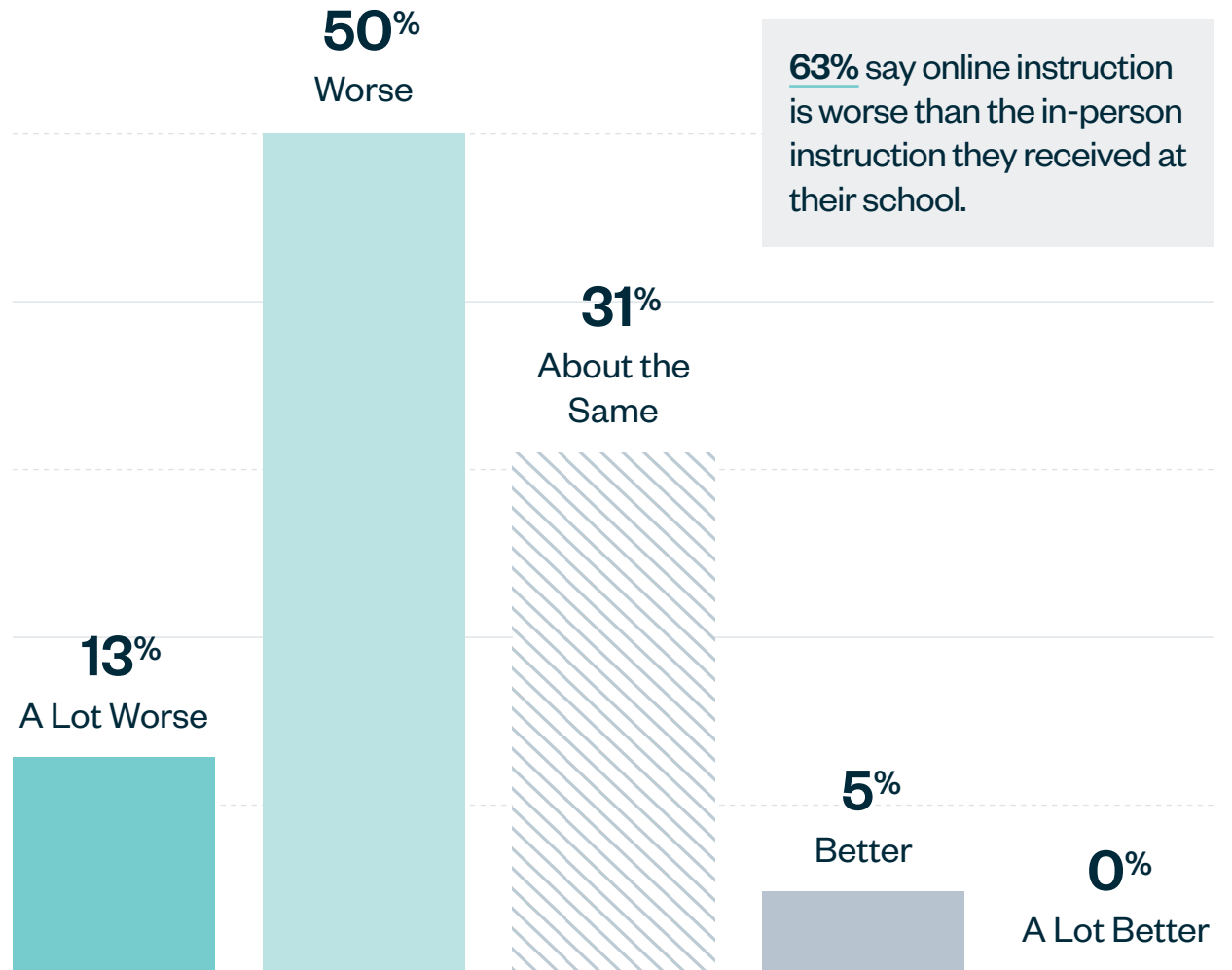


# 97% of college students have switched to online instruction as the result of COVID-19.

The majority of college students have switched to online instruction, and students have been quick to evaluate online instruction as worse than the in-person instruction they received.

As online instruction continues, especially in the stress and uncertainty of COVID-19, students will continue to reflect on their in-person experience. Likely, they will start to recognize the value of that in-person experience even more. For now, it is doubtful that traditional residential students will see online programs as a valid alternative, but that could change as the outbreak continues.

How does online instruction compare to the in-person instruction you received at your school?



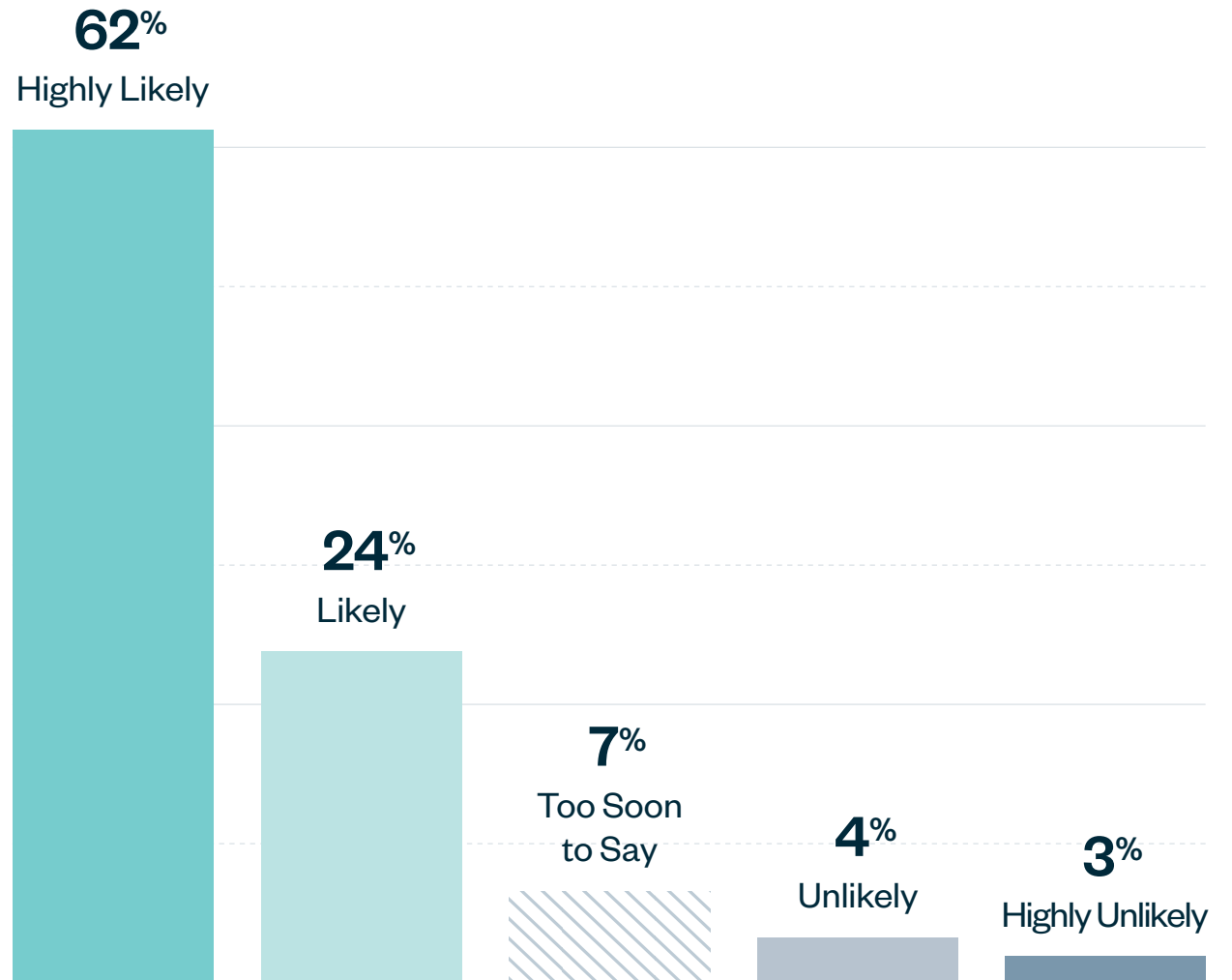
\* At the time this data was collected, a small percentage of colleges/universities had not yet switched to online instruction.

# 86% of college students expect to return to their current school next term.

Current college students aren't quite ready to consider the possibility of changing their future college plans.

While most aren't yet considering alternatives for their future education, that will likely change as time goes on and financial uncertainty continues to grow.

How likely are you to return to your current college/university for the fall term?





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# Key Insights



# Key Insights

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## Enrollment Risk

About a quarter of high school seniors who have already picked a college say they are likely to change their minds or report it's "too soon to say" if they will change their minds about where they will go to school this fall. In other words, about a quarter of the students who have already deposited can be considered "at-risk" for changing their minds.

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## Alternatives to 4-Year Institutions

11% of students who were planning to attend a 4-year college before the COVID outbreak now say they will go to a community college, enroll in an online college, or not go to college at all. An 11% drop in incoming freshmen could be enough to create dramatic revenue shortages at many colleges and universities, especially if retention is down as well.

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## Not Enough Information

High school students usually complain that colleges send them too much information via email and snail-mail. But, right now, a large percentage of decided HS seniors actually want colleges to send them more information about how COVID-19 may impact their enrollment for fall. Specifically, high school seniors want more opportunities to observe online classes and participate in virtual campus tours.

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## COVID-19 Communication Quality

3 out of 4 current college students rate the communications they are receiving about COVID-19 from their college or university as excellent or good. However, those who are not satisfied with their school's communications have a more negative impression of the institution. If schools don't continue to provide timely and high-quality communications, negative opinions will fester and may become a more serious threat to retention.

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## Online Instruction Doesn't Measure Up

After only a couple weeks of online learning, current college students are already critical of the quality of the online instruction they are receiving; two-thirds rate it worse than in-person instruction. While exposure to online learning may lead some students to see it as a valid alternative, we expect a resurgence of interest in the traditional residential 4-year college experience once the pandemic subsides.

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## Financial Uncertainty Grows

If this research was conducted this week instead of last, the findings could be radically different as the situation is changing rapidly. Families likely aren't yet feeling the full financial implications of COVID-19 and its effect on the economy. As the pandemic progresses and students and families become more aware of their new reality, we expect more of them may start considering alternative options for their future education or even reconsider the feasibility of attending a traditional, 4-year college/university at all.

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## Measure Your Key Audiences

These data are based on national samples of college-bound high school seniors and current college freshmen, sophomores, and juniors. The only way to know where your institution truly stands is to conduct a similar study of your current and prospective students.

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SimpsonScarborough is a full-service research, branding, and marketing agency, and higher education's premier data-driven partner.

As champions and stewards of colleges and universities, we provide higher ed brands the confidence of rigorous and comprehensive research — the cornerstone of our work — informed strategy, inspired creative, and human-centered digital. The trusting relationships we've formed and the campuses and communities we've brought together are among our most valuable assets.

Individually, we've held nearly every job in the industry and hail from every part of the country; we have three offices strategically placed in Alexandria, Virginia, Columbus, Ohio, and Oakland, California. Most of all, we're proud, professional students — curious by nature and compassionate by choice, constantly putting in the hard and smart work to shape the industry we love and the brands that shape our world.

On behalf of our Alexandria,  
Oakland, and Columbus offices,

**Thank you.**