
Higher Ed and COVID-19

April Replication of the National Student Survey

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When we launched our initial study in March, soon after the COVID-19 outbreak in the US., it was to gauge the impact the pandemic was likely to have on higher education enrollment in the Fall. Since that time — just four weeks ago — unemployment numbers have skyrocketed, domestic cases have surpassed 1 million, and more than 200,000 people have died as a result of the novel coronavirus.

Our April replication helped us to better understand how perceptions were evolving — and how they were staying consistent — during this time of extraordinary uncertainty. Based on the data we've collected over the past two months, we're now predicting that domestic undergraduate enrollment decline for 4-year institutions may hit 20% — a number that would be truly catastrophic for our industry.

The purpose of sharing this data is not to fear monger, but to help institutions prepare for the magnitude of what may come. Additionally, we hope our findings are a catalyst to raise the dialogue about how higher education is a national priority and help it to receive the support it needs.

Make no mistake, these findings are highly volatile. They'll continue to evolve all the way up to the start of the traditional school year — especially with an anticipated second-wave coming this winter. Which is why we'll continue to perform research as we work through this crisis and look to the better days ahead.

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

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



Methodology Overview

	March '20	April '20
Geographic Distribution	National Sample: Controlled for distribution across Northeast, South, Midwest and West	
Margin of Error	<5%	<5%
Completed Surveys	1,086	1,172
Data Collection Period	March 25 – 30, 2020	April 15 – 20, 2020

Sampling Frame —

- Current high school seniors in the US who were planning to attend a traditional 4-year college/university as a residential student prior to COVID-19 outbreak in the US
- Current residential college/university freshmen, sophomores, and juniors living in the US



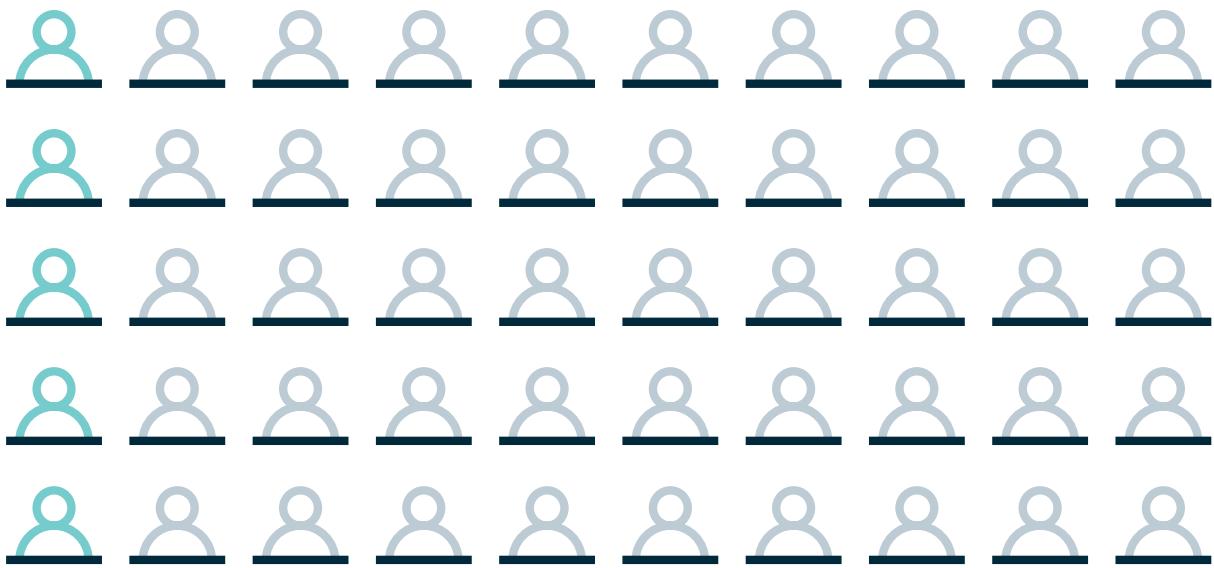
This study is powered by [InnovateMR](#).

Enrollment at 4-year
colleges and universities
could decline 20%

1 10% of high school seniors will no longer attend a 4-year institution.

Higher education should plan for a 10% decline in first-time, full-time enrollment across the category. One in ten US. high school seniors who were planning to attend a four-year college or university prior to the pandemic have already made alternative plans.

These findings were consistent across the March and April surveys. The vast majority of these students blame COVID-19 for dashing their plans to attend a 4-year residential institution. Nearly half plan to attend a community college and about a third plan to enroll in an online college. The remainder may not go to college at all.



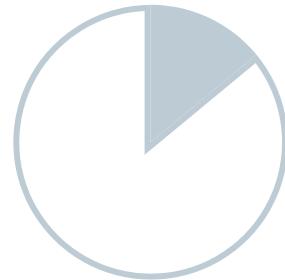
② Retention will be down, too.

In late March, 14% of college students said they were unlikely to return to their current college or university in the Fall, or it was “too soon to tell.” Exactly three weeks later, in mid-April, that figure had gone up to 26%.

These figures illustrate a very high level of uncertainty around college plans for Fall, suggesting that colleges and universities should take extreme measures to connect with students to provide information, offer support, and explore options that will allow students to continue their education.

Late March

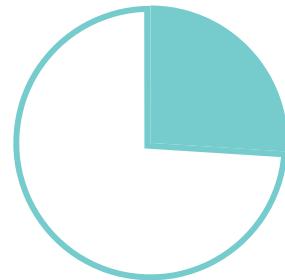
14%



3 Weeks

Mid-April

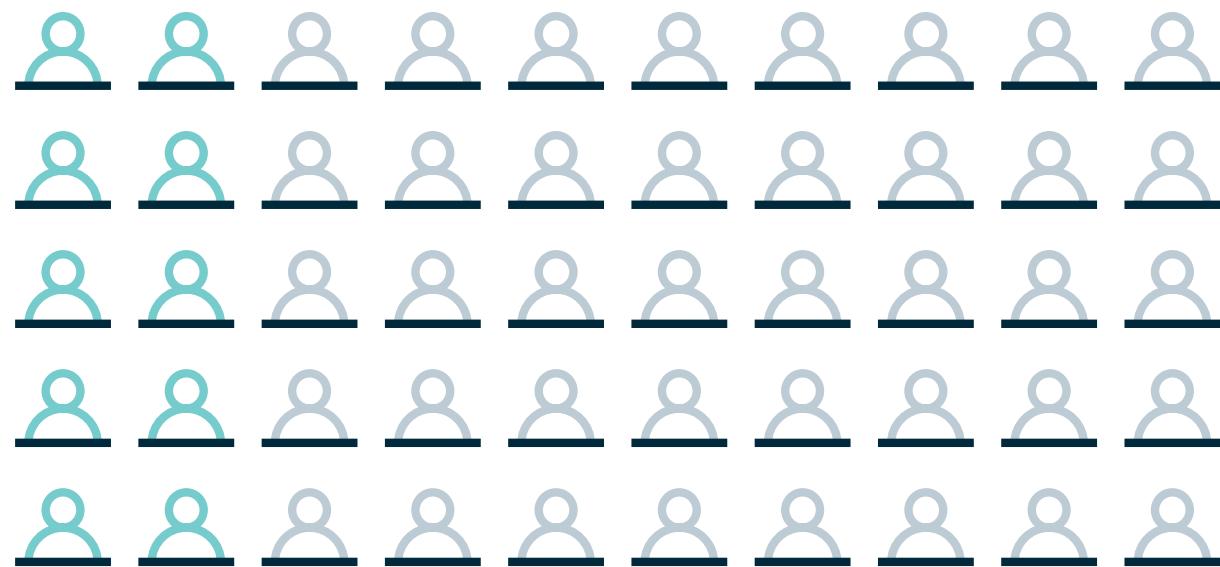
26%



③ If colleges only open online, the decline in enrollment will be even worse.

20% of high school seniors who are currently planning to enroll at traditional, four-year colleges and universities in the Fall say they will change their plans if colleges are only able to provide online instruction.

Retention will be a problem as well, with 14% of current college students saying they will not return to their campus if only online instruction is possible. 5% of high school seniors and 4% of current college students say they will enroll at a different institution while 12% of high school seniors and 7% of current college students say they will take a gap year.



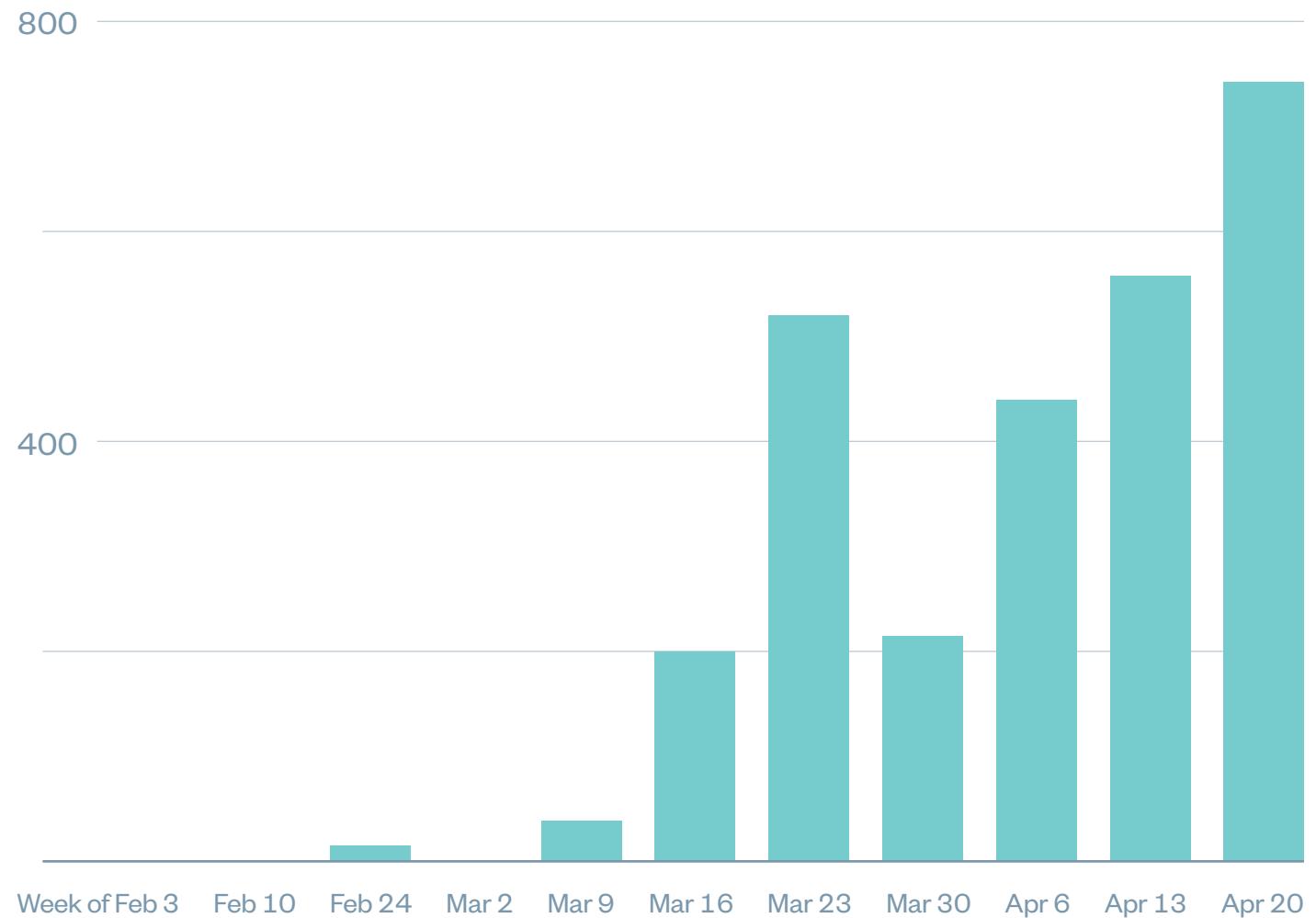
4 The gap year is gaining even more popularity.

The gap year has been gaining popularity for a decade. Though “gappers” are hard to track, it’s estimated that about 3% of American freshmen typically take a gap year.

If 12% of high school seniors and 7% of current college students opt for a gap year, as our findings indicate, it will create myriad challenges for higher ed. Institutions will be forced to wrestle with the impact on tuition revenue for this fiscal year in addition to the housing, advising, and scheduling complications that will be created by a surge in the freshmen class for Fall 2021. Many colleges will not be able to approve all the deferral requests, creating resentment for the institution on top of the hit to enrollment.

Weekly Gap Year Mentions

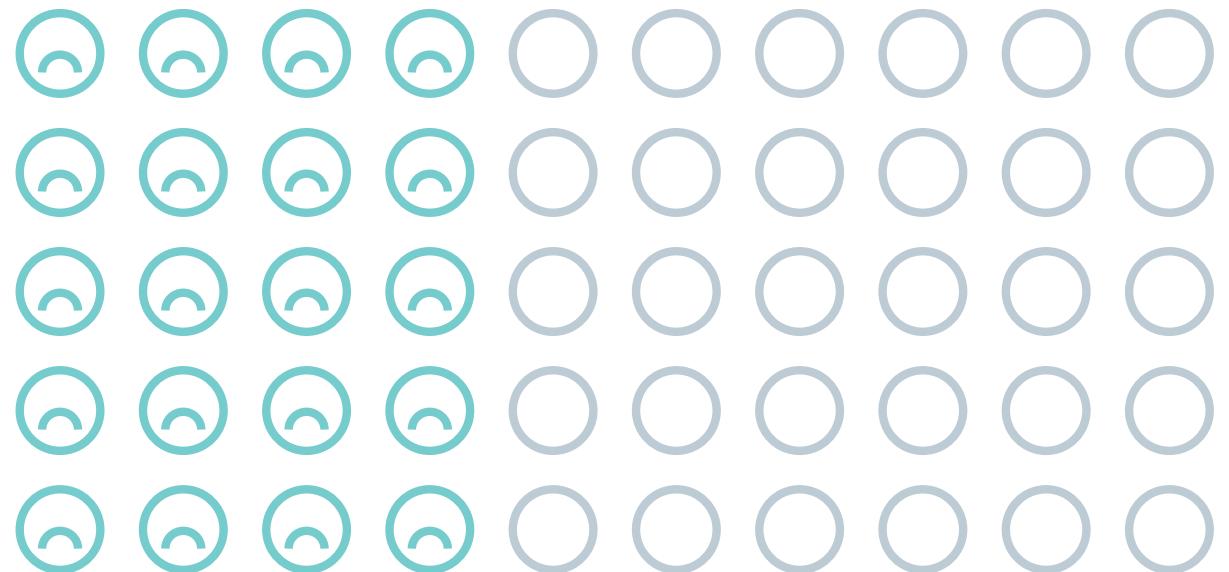
Data Source: [Campus Sonar's Coronavirus Higher Education Industry Briefing](#) data set, which captures publicly available conversations in the United States, plus Reddit and YouTube, about higher education and the coronavirus.



5 COVID-19 communications are affecting the perceptions of colleges and universities.

40% of college students have a “worse” opinion of the college or university they’re attending since the outbreak of COVID-19 in the US. Moreover, there’s a strong correlation between the overall opinion of an institution and the quality of its COVID-19 communications.

69% of college students who say their institution’s COVID-19 communications are fair or poor have a worse opinion of the school than they did before the pandemic hit. High school seniors and current students planning to enroll or return to college campuses in the Fall need improvement in both the quality and quantity of information about how COVID-19 will affect their enrollment.



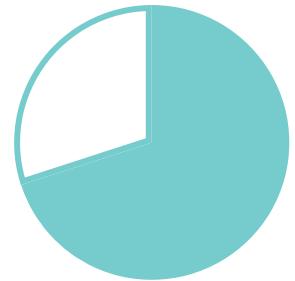
6 Most college students hate remote learning, but some will opt to finish online.

As colleges transitioned to online instruction, many hypothesized that preference for online learning would increase, negatively impacting preference for the traditional, four-year, residential college experience. Instead, 70% of students say that online learning is worse than in-person instruction.

When given the option to finish their degree online or go back to their campus and complete their degree in-person, 85% want to go back to campus. But 15% want to finish online, which could be yet another factor influencing retention. Minority students are even more likely to say they would like to complete their degree online; 18% prefer the idea compared to just 13% of white students.

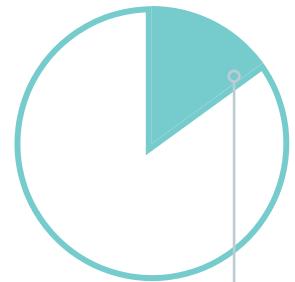
College students who say online learning is **worse** than in-person instruction

70%



College students who, when given the option to finish their degree online or complete their degree in-person, **want to finish online**

15%



Minority students are **more likely** to say they would finish online

18% of Minority Students



13% of White Students



7 COVID-19 is negatively impacting minority students more than white students.

41% of minority high school seniors say it's likely they won't go to college at all in the Fall or "it's too soon to say," compared to 24% of white high school seniors.

With deadlines looming to make a final college choice, a higher percentage of minority students (24%) are still undecided about which school they will attend; only 14% of white students remain undecided. And, because of COVID-19, the top choice school has changed for a third of undecided minority students, but only 15% of undecided white students.

Minority students who are already attending four-year institutions are also feeling the impact of COVID-19 more than white students. 22% of white college students, but 32% of minority college students, say it's unlikely they will return to their college/university this Fall or "it's too soon to say." 64% of minority college students compared to 44% of white college students say their college plans for Fall are being affected by COVID-19.

Minority Students

High School Seniors
who say it's likely they
won't go to college
at all in the fall or "**it's
too soon to say**"

41%



White Students

24%



High School Seniors
who say their **top
choice school has
changed** due to
COVID-19

33%



15%



College students who
say it's **unlikely they
will return** to their
college/university
this fall or "**it's too
soon to say**"

32%



22%



→ The total effect on higher education enrollment could be catastrophic.

In the worst-case scenario, both incoming freshmen and returning student enrollment will be down, the number of gappers will increase significantly, other students will not enroll or persist because they are turned off by online instruction, and a portion of students will get used to remote instruction and opt to complete their degree online.

The total effect on higher education could be a catastrophic domestic enrollment drop of 20% at four-year institutions.

Not all colleges will be affected equally. Some will experience much more significant declines, while others will not decline at all. The most selective institutions will always be in demand but may have to dip deep into their waitlists to fill the class. This will have a trickle-down effect on the rest of the sector: Mid-tier colleges and universities will struggle and hustle to meet their enrollment goals while the least selective institutions will be hit the hardest.



Recommendations for Colleges

01. Improve the reach and quality of communications with your new and returning students.

It's not enough to post updates to your COVID-19 page and hope current and prospective students find them. Instead, find ways to adapt the content to fit the medium to make it easier to consume both in email communications and social media — particularly Instagram Stories, Snapchat, and TikTok. Do whatever you can to get information to your students, including investing in advertising or paid promotion to ensure you are being seen and heard. Err on the side of over communicating even when you don't have any new news to share. When final decisions are still in flux, be transparent about where you are in the process, and share when a final decision can be expected.

In a world where little is certain, simply providing updates is reassuring. Student opinions of their college or university are being significantly influenced by the ways institutions are communicating through the pandemic. For now, a "more is more" strategy is appropriate.

There is no denying that the outlook for traditional four-year colleges and universities this Fall looks grim. But to reduce the potential damage to your campus, here are six steps you can take:

02. Create more opportunities to connect one-on-one or one-to-a few.

Inviting all admitted students to a virtual open house is great, but both new and returning students should also have opportunities to connect one-on-one and in small groups with faculty, staff, peers, and alumni. College-bound high school seniors say that many virtual events for admitted students are "too general" providing information that is easily found on the institution's web site. Or they say that Q&A type events with large groups simply don't allow them to get their specific questions answered.

Trend analysis of university websites is showing a 20% decline in page views for enrollment related content. Creating a microsite for these audiences that allows them to schedule one-on-ones is one of the best things you can do. Connecting with an individual student or a small group of students with shared characteristics and exploring how they are doing will go a long way to identifying students who are at risk for not showing up in the Fall. Once identified, potential strategies for mitigating the factors that will keep them from enrolling or re-enrolling can be explored.

Recommendations for Colleges (Cont.)

03. Remind students what they love about your campus

Does the bell toll every hour on your campus? Do students walk across a seal on the ground in front of Old Main most days? Is there an iconic building that anchors your community? Do you have a beloved mascot? Do you have a quirky faculty member who roller skates across campus? Think of ways you can help your students experience those cherished aspects of your campus experience. Show students where and how your mascot is quarantining. Post a video of the bell tolling or the professor on skates. Reinforce all the reasons students love your campus and help them experience it remotely until they can come back in person.

There is no denying that the outlook for traditional four-year colleges and universities this Fall looks grim. But to reduce the potential damage to your campus, here are six steps you can take:

04. Plan for a huge increase in gappers.

All signs point to a record increase in requests to defer enrollment for a year. And, it's not just freshmen that are interested in a gap year; a sizeable percentage of current college students are also interested. Plan now for ways to handle a flood of requests to defer enrollment especially if your campus is getting ready to announce plans to only open online in the fall.

Review your institution's policies and develop a firm position on whether your institution will encourage or discourage students to take a gap year. Share the options and your policies with students early and frequently because the popularity of the gap year is getting ready to explode.

Recommendations for Colleges (Cont.)

05. Give students every reason to show up this fall.

Now is the time to think creatively, be flexible, and innovate. Oberlin invited all admitted freshmen to participate in a free course this summer that will help tie them into the campus community, not to mention experience first-hand what it's like to take a college class. Maybe they'll fall in love with the professor, make new friends, and decide they can survive remote learning after all? Central Michigan froze its tuition and is allowing students to defer payment, which illustrates their effort to be sensitive to the financial strain COVID-19 is creating. Beloit College changed its academic calendar, implemented an aggressive "Advanced Mentoring Program," and announced a wide variety of financial support programs.

One has to admit — without the pandemic, changes like these would likely have taken much longer to implement. Any strategies your institution can use to address affordability issues, improve upon the quality of the remote learning experience, and help students experience your culture, your campus, and your people will help your institution maximize enrollment.

There is no denying that the outlook for traditional four-year colleges and universities this Fall looks grim. But to reduce the potential damage to your campus, here are six steps you can take:

06. Don't forget about parents.

Parents are the unknown factor in our prediction for the enrollment decline hitting the four-year college sector. How many parents are going to feel comfortable sending their children to live in residence halls that are more densely populated than New York City apartment complexes? We have no way of knowing how coronavirus-related PTSD is going to affect the behavior of parents.

What we do know from recent studies is that parents are not excited to pay the same price for remote instruction that they were paying for their kids to be on campus. Parents are the x-factor for fall, especially if institutions are unable to fully open their campuses. They think remote learning should be cheaper and believe professors are ill-prepared to teach online. Communication with parents is key and keeping them informed throughout the summer should be a priority.

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

Thank you.



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