Higher Ed and COVID-19 / Part IV

National Student Survey — The Other COVID-19 Long Haulers
Introduction

When the coronavirus outbreak first arrived in the United States a full year ago, we immediately launched a series of research studies to understand the impact it would have on higher education. In all three of our previous surveys, we wanted to investigate the direct impact of the pandemic on students’ plans for college (and therefore on fall enrollment), and how institutions could best position themselves to endure this crisis.

This study is different. We wanted to measure not just the direct impact of the pandemic on higher education, but also the indirect effects felt by students after living through it for 12 months. We surveyed high school seniors to understand how the pandemic has affected the college search process and their lives as a whole. Do they feel prepared for this next stage in their lives? Are they engaged in their education? Has their academic performance suffered?

What we uncovered was COVID’s other crisis — its deep and pervasive effect on students’ mental health.

25 Key Findings

Students are in crisis and they need support.
Students are behind in their college search.
School counselors play a crucial role in supporting students in their college search.

30 Methodology

Nearly a year ago today, we first went into the field to understand the impact of COVID-19 on higher education. Looking back, none of us could have predicted the year we’ve all been forced to endure. But our mission then was the same as it is now: to provide colleges and universities with the vital data they need not just to survive the crisis, but to thrive once again.

After all, it was our colleges and universities who went to work creating live dashboards to track the spread of the virus across our country, who innovated new ways to develop PPE to meet the extraordinary demands on our healthcare system, and who contributed vital research in developing the vaccine that will allow us all to finally move past this.

Higher education has been resilient throughout the pandemic, but they face their toughest test yet this fall: addressing the lingering effects of COVID-19 on students’ mental health and meeting this incoming class where they’re at — anxious, unprepared, disengaged, and in need of holistic support.

Fortunately for all of us, there’s light at the end of this long tunnel. As the vaccine becomes available to everyone, we hope that these students and our colleges and universities can heal together. As things continue to unfold, we’re committed to publishing research that empowers university leadership to adapt to the demands of a rapidly changing world.

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
SimpsonScarborough is a full-service marketing agency exclusively for higher ed.

What We Do

Our Services

Research

Capabilities
- Brand and messaging
- Strategic planning
- Recruitment
- Alumni engagement
- Fundraising
- Image and perception
- Creative testing

Advanced Analytics
- Conjoint analysis
- TURF analysis
- Discrete choice analysis
- Segmentation
- Max differential
- Factor analysis

Methodologies
- Surveys
- In-depth interviews
- Focus groups

Strategy

Capabilities
- Brand positioning and platform development
- Message creation and mapping
- Data-driven personas
- Competitor analysis
- Brand assessments

Brand launch planning
- Paid media strategy and planning
- Content strategy development
- Digital marketing planning

Methodologies
- Metrics and ROI evaluation
- Multi-year institutional marketing plans

Creative

Capabilities
- Visual identity
- Logo development
- Guidelines
- Advertising
- Marketing collateral
- Content development
- Video and radio

Web, digital, and social
- Experiential
- Trainings and workshops
- Brand campaigns
- Enrollment campaigns
- Capital campaigns

Video Production
- Brand anthem
- Animation and motion graphics
- Video series
- Virtual reality
- Television spots
- Aerial drone

Digital

Capabilities
- Content strategy
- Website design
- SEO strategy
- Analytics review
- Custom CMS builds
- Digital viewbooks
- Email marketing

Drupal
- OmniUpdate
- WordPress
- Terminal4
- Cascade
- Custom applications
- Touchscreen displays

Technologies
- Drupal
- OmniUpdate
- WordPress
- Terminal4
- Cascade
- Custom applications
- Touchscreen displays
National Survey of College-Bound High School Seniors — February 2021

We surveyed 688 high school seniors from across the U.S. who are planning to enroll at a four-year residential college/university after graduation. Our data collection period was February 10th-17th, 2021. We analyzed the data to look for differences by geography, gender, race/ethnicity, first-generation status and high school type.

In addition to our own survey data, we reviewed a myriad of secondary data sources directly or indirectly referencing the impact of COVID-19 on high school students’ college search and mental health, including surveys by other research agencies; university studies; articles and relevant interviews; and social media content and sentiment analysis.
High school students are in crisis and they need support.

“
To be honest, ever since quarantine I’ve felt lifeless.”

Current High School Senior
Most college-bound high school seniors are taking all or some of their classes online, and regardless of their gender, race, ethnicity, background, or even the direct impact of COVID-19 on their family’s health and livelihood, all students are struggling.

Current Learning Environment

- ALL of my classes are online: 59%
- SOME of my classes are online: 27%
- All of my classes are in person: 14%

63% say they are LESS motivated.

57% say their educational experience is WORSE.

66% say they are LESS engaged.

29% say their grades are WORSE.
Higher Ed and COVID-19 / High school students are in crisis and they need support.

What’s more, the negative impact on educational experience isn’t limited to high school seniors who are learning online. Students taking their classes in person were impacted too.

<table>
<thead>
<tr>
<th>Impact of COVID-19 on Educational Experience by Current Learning Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking ALL classes online</td>
</tr>
<tr>
<td>59%</td>
</tr>
</tbody>
</table>

In general, the quality of my educational experience now is WORSE.

60% 55% 56%

I am LESS MOTIVATED now than before the COVID-19 outbreak.

66% 64% 55%

I am LESS ENGAGED now than before the COVID-19 outbreak.

69% 62% 59%
Even with the end of the pandemic in sight, high school seniors still feel anxious about the likelihood that they’ll be able to begin their college education in person.

Rate your level of your anxiety about how COVID-19 may affect your ability to begin your college education in person this fall.

- **Very high (10)**: 14% Rated a 9 or 10
- **Very high (10)**: 14% Rated an 8
- **Very high (10)**: 14% Rated a 7
- **Very high (10)**: 11% Rated a 6
- **Very high (10)**: 17% Rated a 5
- **Very high (10)**: 8% Rated a 4
- **Very high (10)**: 6% Rated a 3
- **Very high (10)**: 3% Rated a 2
- **Very low (1)**: 7% Rated a 1

48% of college-bound high school seniors have a high level of anxiety about how COVID-19 will affect their ability to begin their college education in person this fall.

76% of high school seniors report at least moderate anxiety.

High anxiety: rating ≥7
Moderate anxiety: rating 5 or 6
Most college-bound high school seniors say COVID-19 directly impacted their family in some way.

- 44% say their family’s financial situation has been impacted by COVID-19
- 23% say a parent/guardian has been laid off or furloughed due to COVID-19
- 42% say someone in their immediate family has been sick with COVID-19

68% say one or more of these things is true.
Is there anything else you would like to share about the impact of the COVID-19 outbreak on your college decision?

“I feel more in the dark about colleges, and just isolated.”

“I’m more scared now.”

“It’s definitely hurt my mental health, and made school so much harder.”
High school seniors are behind in their college search.

“The COVID-19 outbreak severely affected my mental health, which made me become less motivated for college. Filling out applications felt like a chore, so most of the deadlines had passed by the time I started feeling more like myself.”

Current High School Senior
With decision deadlines looming, an alarming number of college-bound high school seniors planning to attend a four-year school in the fall were still in the early stages of the college search process as of early February 2021.

Where are you in your college search? Note: Data collected February 10th-17th, 2021

- I already know where I’m going to school: 22%
- I’ve already applied to schools or am applying right now: 37%
- I’ve decided which schools I’d like to apply to or attend: 16%
- I have started researching schools and requesting information: 17%
- I haven’t thought much about it yet: 9%

41% of high school seniors haven’t applied to any schools yet.

26% haven’t even decided where they want to apply.

Black and Hispanic high school seniors are further behind in their college search. Only 39% of Black seniors and 49% of Hispanic seniors had started the application process at the time of this survey, compared to 70% of white, non-Hispanic seniors and 75% of Asian seniors.
With continued uncertainty and difficulty accessing resources and support due to COVID-19, 1 in 4 high school seniors don't feel prepared to make their college choice.

Challenges experienced by those who said they don't feel prepared to make a college choice:

- Figuring out which schools might be the right fit for me: 69%
- Finding information on scholarships: 58%
- Not being able to visit campuses in person: 54%
- Determining the best major for me: 50%
- Filling out financial aid paperwork: 50%
- Keeping track of admissions and financial aid deadlines: 47%
- Understanding next steps once I've been accepted: 47%
- Limited support or guidance from high school counselors: 45%
- Filling out my college applications: 42%
- Writing essays for my applications: 42%
- Lack of communication or information from colleges I was considering: 38%
- Not being able to take the ACT or SAT: 33%
- Not being able to participate in my regular sports or activities: 31%
- Having no grades for Spring 2020 because my school used pass/fail: 11%

Do you feel prepared to make a college choice?

- Yes, 77%
- No, 23%
85% of high school seniors think visiting colleges is an important part of choosing which school to attend, but 1 in 2 haven’t been able to tour any campuses yet.

Almost 1 in 3 say they have cut schools from their consideration set because they were unable to visit.
86% of college-bound high school seniors are currently taking some or all of their classes online, and this has had a negative impact on how prepared they feel to choose a college.

Seniors taking some or all of their classes online are 2x more likely to say they don’t feel prepared to make a choice.

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**Do you feel prepared to make a choice about which college to attend next year?**

- **ALL of my classes are online**
  - Yes, 75%
  - No, 25%

- **SOME of my classes are online**
  - Yes, 77%
  - No, 23%

- **All of my classes are in person**
  - Yes, 88%
  - No, 12%
Is there anything else you would like to share about the impact of the COVID-19 outbreak on your college decision?

“It has definitely made me doubt my ability to go to college.”

“It’s making it really hard to even think about college right now with how messed up everything is.”

“It’s definitely hurt my mental health, and made school so much harder.”

“It has definitely made me doubt my ability to go to college.”

“It kind of makes me want to cancel my college plans.”

“I feel more in the dark about colleges, and just isolated.”

“I’m more scared now.”
School counselors play a crucial role in supporting students throughout the college search and decision process.

“I wish I could have sat down and talked to a counselor at school, rather than on Zoom.”

Current High School Senior
With the sudden school closures in Spring 2020, many school counselors were busy making sure students had access to technology for remote learning, as well as more basic needs like food and housing. *College planning, by necessity, took a back seat.*

Sources:

Conversely, nearly 50% of counselors reported spending more time supporting students’ social-emotional needs and personal development.

Sources:
College-bound high school seniors have felt the impact of this deficit, with more than a third saying they have not had adequate communication with their counselors about their college search.

Communication issues are worse in a completely remote environment.

6 in 10 seniors are taking classes online only this year. For these students, communication with counselors is more of a challenge, with 44% reporting that this communication has been inadequate.

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Do you feel that you have had adequate communication with your high school counselor about your college search?

<table>
<thead>
<tr>
<th></th>
<th>In Person/Hybrid</th>
<th>Online Classes Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>69%</td>
<td>56%</td>
</tr>
<tr>
<td>No</td>
<td>31%</td>
<td>44%</td>
</tr>
</tbody>
</table>
Higher Ed and COVID-19 / School counselors play a crucial role in supporting students during their college search.

Communication with counselors has also been a greater challenge for high school seniors whose family’s financial situation has been affected by COVID-19 — they felt more anxiety about their ability to begin their college education in person this fall, and are more likely to cite filling out financial aid paperwork and finding scholarship information as major challenges.

<table>
<thead>
<tr>
<th>Do you feel that you have had adequate communication with your high school counselor about your college search?</th>
<th>Family’s financial situation not affected by COVID-19</th>
<th>Family’s financial situation affected by COVID-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>67%</td>
<td>57%</td>
</tr>
<tr>
<td>No</td>
<td>33%</td>
<td>43%</td>
</tr>
</tbody>
</table>

43% of these seniors feel that communication with their counselors has been inadequate.
Higher Ed and COVID-19 / School counselors play a crucial role in supporting students during their college search.

For those college-bound high school seniors whose family’s financial situation was affected by COVID-19, adequate communication with counselors was shown to have a positive, mitigating effect on the extra challenges they faced.

If they did NOT have adequate communications from counselor

57% of financially impacted respondents say they feel prepared to make their college decision

If they DID have adequate communications from counselor

88% of financially impacted respondents say they feel prepared to make their college decision
Higher Ed and COVID-19 / School counselors play a crucial role in supporting students during their college search.

High school seniors with adequate counselor communication struggled less than their peers with choosing a major, finding schools that were the right fit, finding scholarship information, and understanding the next steps once they are accepted to colleges. They also reported lower levels of anxiety.

<table>
<thead>
<tr>
<th>Major challenges in the college search (% respondents)</th>
<th>Inadequate communication with counselor</th>
<th>Adequate communication with counselor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determining the best major for me</td>
<td>47%</td>
<td>38%</td>
</tr>
<tr>
<td>Figuring out which schools might be the right fit for me</td>
<td>56%</td>
<td>48%</td>
</tr>
<tr>
<td>Finding information on scholarships</td>
<td>58%</td>
<td>47%</td>
</tr>
<tr>
<td>Understanding next steps once I've been accepted</td>
<td>49%</td>
<td>36%</td>
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</tbody>
</table>

Level of anxiety about their ability to start college in person in the fall

<table>
<thead>
<tr>
<th>Level of anxiety about their ability to start college in person in the fall</th>
<th>Inadequate communication with counselor</th>
<th>Adequate communication with counselor</th>
</tr>
</thead>
<tbody>
<tr>
<td>High anxiety (7-10)</td>
<td>56%</td>
<td>44%</td>
</tr>
</tbody>
</table>
Is there anything else you would like to share about the impact of the COVID-19 outbreak on your college decision?

“It has definitely made me doubt my ability to go to college.”

“It has made it much more confusing and hard (…) Being the oldest child has been very overwhelming.”

“It’s making it really hard to even think about college right now with how messed up everything is.”

“It’s very difficult to find resources for college now.”

“I feel that I need someone in person to help guide me through the college applications.”

“It’s definitely hurt my mental health, and made school so much harder.”

“It’s making it really hard to even think about college right now with how messed up everything is.”

“It kind of makes me want to cancel my college plans.”
Key Findings
Higher Ed and COVID-19 / Key Findings

For us as researchers, the most difficult part of creating this fourth report was sifting through the sheer volume of responses from students who felt sad, anxious, and unenthusiastic about their futures.

It’s clear to see that the social and financial challenges caused by the pandemic have created a deficit for our college-bound seniors; and although counselors have been able to mitigate these added challenges, they’ve been unable to completely make up for them.

This presents a unique and unprecedented challenge for higher education. ‘Meeting students where they are’ has a whole new meaning in 2021; and it’s a responsibility institutions must be prepared for if these students are to thrive.

I have multiple health issues that are likely to cause complications should I contract the virus again.

It has made me less active and more depressed, because I can’t hang out with my friends.

I feel that I need someone in person to help guide me through the college application process.

It’s definitely made me doubt my ability to go to college.

It’s making it really hard to even think about college right now with how messed up everything is.

It’s been a lot more stressful to make such large, life-altering decisions.

It’s very difficult to find resources for college now.

It’s definitely made me want to cancel my college plans.

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It has made me less active and more depressed, because I can’t hang out with my friends.

It’s definitely made me doubt my ability to go to college.

It has made it much more confusing and hard. (…)

Being the oldest child has been very overwhelming.

It’s very difficult to find resources for college now.

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It’s making it really hard to even think about college right now with how messed up everything is.

It has definitely made me doubt my ability to go to college.
Key Finding No. 1:
Students are in crisis and need support.

The past year has been tough on us all, but the effect on our developing youth is likely much worse. While these students are not children, they're not yet adults, and the long-term implications on their overall wellbeing have yet to be determined.

Deciding where to go to college is the first major decision of these students’ lives, but many are simultaneously dealing with varying levels of anxiety, trauma, and grief. Institutions must be prepared to meet a diverse set of ongoing needs and provide more support services than ever before.

Most importantly, they must build empathy into their internal and external communications, processes, and systems. This cannot be the responsibility of a single department or campus initiative; every staff and faculty member should undergo some level of grief training, and proactively search for ways to reduce the root causes of uncertainty, anxiety, and confusion as everyone learns to adjust to a post-COVID world.

How has your institution prepared for the mental health challenges of this incoming class? Is the response handled solely by a task force, or is the entire campus community taking ownership?

Have departments assessed their own strategies, processes and deadlines in the wake of the realities this student population is facing? How can you improve flexibility and understanding while keeping the trains running on time?

As retention becomes even more critical, is Central Marketing Communications working alongside Student Affairs to support communications, and promote new student support programs and services?
Key Finding No. 2:

Students are behind in their college search.

This class were denied the traditional milestones that mark the passage from high school to college, and from adolescence to adulthood. From homecoming to prom, college fairs, and campus visits, and even sitting for the SAT and ACT; not to mention their high school graduations. In a year where time seemed to stand still, the landmark events of a typical high school senior’s year came and went — and along with them, college application deadlines. Many students were left lost and confused as they tried to make decisions about their future in a time marked by uncertainty and ambiguity.

41% of high school seniors planning to attend college had yet to apply to any colleges as of late February — far beyond normal application deadlines. [This number was closer to 50% (47%) in November, according to a survey conducted by Niche and Tudor Collegiate Strategies (TCS).] This demonstrates a clear divide between students who have access to additional resources and those who don’t — the latter being significantly more vulnerable.

Institutions with competitive admissions have seen an influx of applications, in large part due to relaxed standardized testing requirements – but this may have created a false sense of security for fall 2021 enrolment across the industry. With nearly half of all students missing application deadlines, and those who have applied applying to more colleges than normal, yield figures will be highly volatile.

How is your institution building empathy into its admissions and enrollment processes? How are you creating support channels to help students determine if an institution is the right fit?

—

Have you revisited your communications flows to address that students are behind compared to normal years? Have you adjusted your ‘seasons’ (i.e., search, yield, and melt) to address this lag?

—

Have you considered building in content regarding support services and campus resources on search platforms (e.g., Niche, Naviance, and Zeemee) and social media?
Key Finding No. 3:
School counselors play a crucial role in supporting students.

School counselors were forced to shift their focus during the pandemic from providing guidance on college choice to helping students transition to online learning and, in some cases, making sure that students were getting fed and had a roof over their heads. Without this pivotal resource to assist with the often-complicated process of college admission, students were left on their own to figure it out.

According to a study from Harvard University and Boston College, "25% percent of counselors spent less time on college counseling post-COVID and an overwhelming 50% devoted less time to career planning."

In our study, students expressed just how significant an impact this had on their feelings of preparedness. 41% of seniors who had adequate communications with their counselor cited them as the most helpful resource in the absence of campus tours, just behind virtual tours and friends in college.

Students have lost an objective, third-party advocate. How are you working within your community to ensure that students receive the advising, mentorship, and support they need as they embark on one of the most significant decisions of their young lives?

Have you evolved your marketing and enrollment media strategies to leverage owned, earned and paid placements to extend support to prospects in need of guidance and information?

How are you strengthening your relationships with school counselors for future classes? Have you considered shifting content on relevant platforms (e.g., Naviance) from promotion to support and resources for School Counselors?
## Methodology Overview

<table>
<thead>
<tr>
<th>Geographic Distribution</th>
<th>National Sample: Controlled for distribution across the Northeast, South, Midwest, and West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margin of Error</td>
<td>+/- 3.67%</td>
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<tr>
<td>Completed Surveys</td>
<td>688</td>
</tr>
<tr>
<td>Data Collection Period</td>
<td>February 10th – February 17th, 2021</td>
</tr>
<tr>
<td>Method of Data Collection</td>
<td>Online Survey</td>
</tr>
</tbody>
</table>

### Sampling Frame —
- Current high school seniors in the U.S who are planning to attend a traditional four-year college/university as a residential student
- Controlled for representation of minority groups
### Profile of Respondents — High School Seniors 688 Respondents

<table>
<thead>
<tr>
<th>Gender Identity</th>
<th>Male</th>
<th>22%</th>
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<tbody>
<tr>
<td>Female</td>
<td>78%</td>
<td></td>
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<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>White, non-Hispanic</th>
<th>40%</th>
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<tbody>
<tr>
<td></td>
<td>Black, non-Hispanic</td>
<td>19%</td>
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<tr>
<td></td>
<td>Hispanic</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Asian</td>
<td>9%</td>
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<tr>
<td></td>
<td>Another race or multiracial</td>
<td>8%</td>
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<table>
<thead>
<tr>
<th>First-Generation College Student</th>
<th>Yes</th>
<th>28%</th>
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<tbody>
<tr>
<td></td>
<td>No</td>
<td>72%</td>
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<table>
<thead>
<tr>
<th>High School Type</th>
<th>Public</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Private</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Homeschool</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>1%</td>
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<table>
<thead>
<tr>
<th>Home Region</th>
<th>Midwest</th>
<th>25%</th>
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<tbody>
<tr>
<td></td>
<td>Northeast</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>South</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>West</td>
<td>25%</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>High School GPA</th>
<th>A+/95 or higher/3.75 or higher</th>
<th>36%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A/90-94/3.5 to 3.74</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>B+/85-89/3.25 to 3.49</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>B/80-84/3.0 to 3.24</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>C or lower/79 or lower/2.99 or lower</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Types of Colleges/Universities CURRENTLY Considering: public, private, or both?</th>
<th>Public</th>
<th>52%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Private</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Both</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Types of Colleges/Universities CURRENTLY Considering: in-state, out-of-state, or both?</th>
<th>In-state</th>
<th>47%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Out-of-state</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>Both</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>2%</td>
</tr>
</tbody>
</table>
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.