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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.

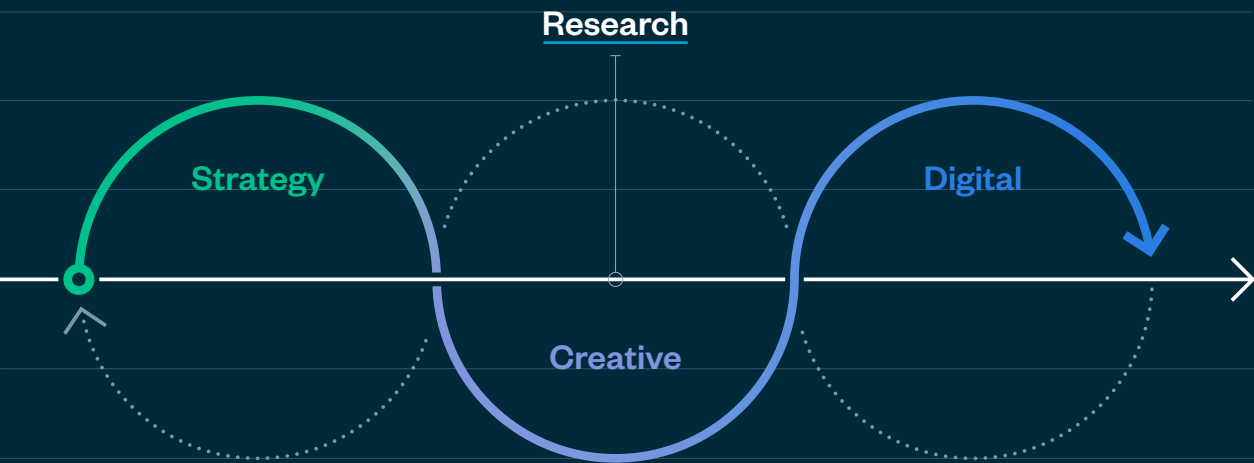
Fortunately for all of us, there's light at the end of this long tunnel. As the vaccine becomes available to everyone, we hope that these students and our colleges and universities can heal together. As things continue to unfold, we're committed to publishing research that empowers university leadership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



Our Services

Research

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| <b>Capabilities</b> <ul style="list-style-type: none"><li>• Brand and messaging</li><li>• Strategic planning</li><li>• Recruitment</li><li>• Alumni engagement</li><li>• Fundraising</li><li>• Image and perception</li><li>• Creative testing</li></ul> | <b>Advanced Analytics</b> <ul style="list-style-type: none"><li>• Conjoint analysis</li><li>• TURF analysis</li><li>• Discrete choice analysis</li><li>• Segmentation</li><li>• Max differential</li><li>• Factor analysis</li></ul> | <b>Methodologies</b> <ul style="list-style-type: none"><li>• Surveys</li><li>• In-depth interviews</li><li>• Focus groups</li></ul> |
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Strategy

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| <b>Capabilities</b> <ul style="list-style-type: none"><li>• Brand positioning and platform development</li><li>• Message creation and mapping</li><li>• Data-driven personas</li><li>• Competitor analysis</li><li>• Brand assessments</li></ul> | <ul style="list-style-type: none"><li>• Brand launch planning</li><li>• Paid media strategy and planning</li><li>• Content strategy development</li><li>• Digital marketing planning</li></ul> | <ul style="list-style-type: none"><li>• Metrics and ROI evaluation</li><li>• Multi-year institutional marketing plans</li></ul> |
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Creative

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| <b>Capabilities</b> <ul style="list-style-type: none"><li>• Visual identity</li><li>• Logo development</li><li>• Guidelines</li><li>• Advertising</li><li>• Marketing collateral</li><li>• Content development</li><li>• Video and radio</li></ul> | <ul style="list-style-type: none"><li>• Web, digital, and social</li><li>• Experiential</li><li>• Trainings and workshops</li><li>• Brand campaigns</li><li>• Enrollment campaigns</li><li>• Capital campaigns</li></ul> | <b>Video Production</b> <ul style="list-style-type: none"><li>• Brand anthem</li><li>• Animation and motion graphics</li><li>• Video series</li><li>• Virtual reality</li><li>• Television spots</li><li>• Aerial drone</li></ul> |
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Digital

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|---|--|
| <b>Capabilities</b> <ul style="list-style-type: none"><li>• Content strategy</li><li>• Website design</li><li>• SEO strategy</li><li>• Analytics review</li><li>• Custom CMS builds</li><li>• Digital viewbooks</li><li>• Email marketing</li></ul> | <b>Technologies</b> <ul style="list-style-type: none"><li>• Drupal</li><li>• OmniUpdate</li><li>• WordPress</li><li>• Terminal4</li><li>• Cascade</li><li>• Custom applications</li><li>• Touchscreen displays</li></ul> |
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## 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 10<sup>th</sup>-17<sup>th</sup>, 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*.



Say they are LESS motivated



Say their educational experience is WORSE






Say they are LESS engaged



Say their grades are WORSE

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%

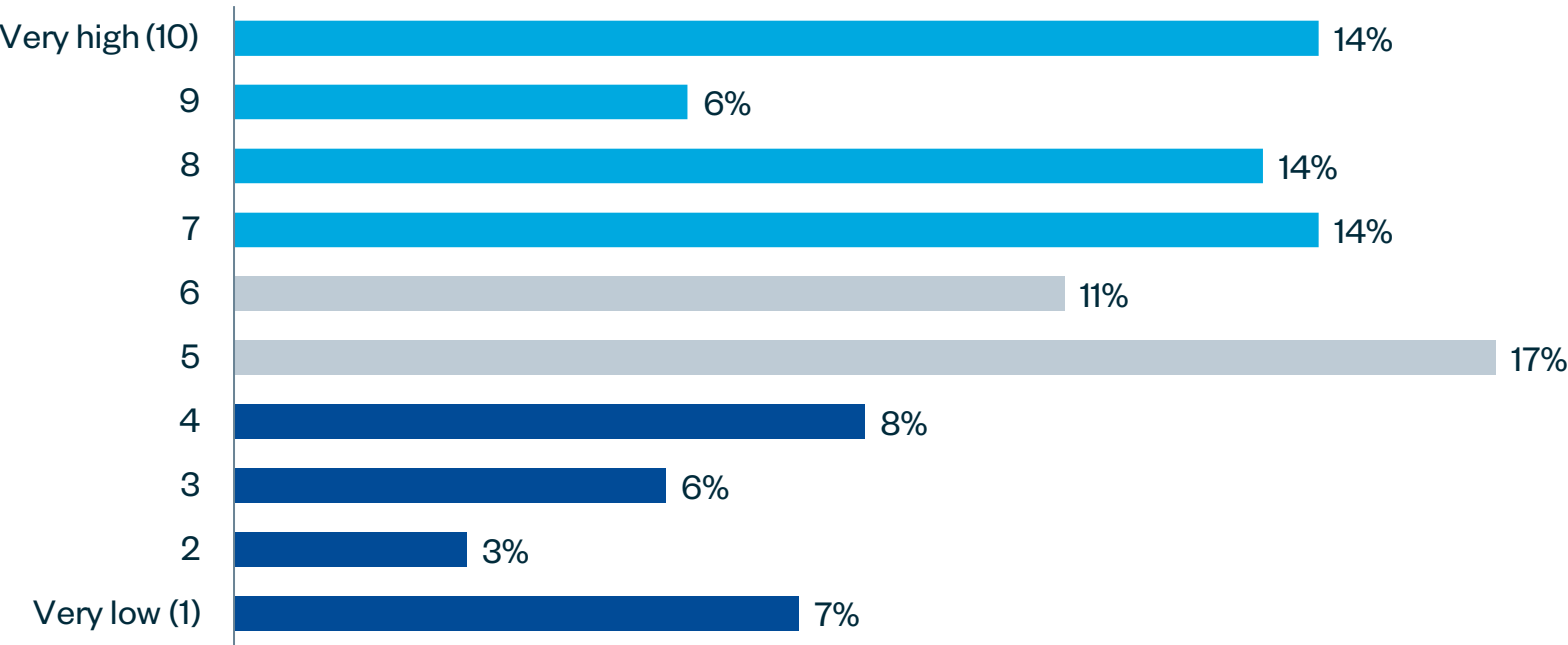
What’s more, the negative impact on educational experience isn’t limited to high school seniors who are learning online. *Students taking their classes in person were impacted too.*

Impact of COVID-19 on Educational Experience by Current Learning Environment

	Taking ALL classes online 59%	Taking SOME classes online 27%	Taking all classes in person 14%
In general, the quality of my educational experience now is <b>WORSE</b> .	60%	55%	56%
I am <b>LESS MOTIVATED</b> now than before the COVID-19 outbreak.	66%	64%	55%
I am <b>LESS ENGAGED</b> 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.



**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  $\geq 7$   
Moderate anxiety: rating 5 or 6

*Most* college-bound high school seniors say COVID-19 directly impacted their family in some way.



Say their family's financial situation has been impacted by COVID-19



Say a parent/guardian has been laid off or furloughed due to COVID-19



Say someone in their immediate family has been sick with COVID-19



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.

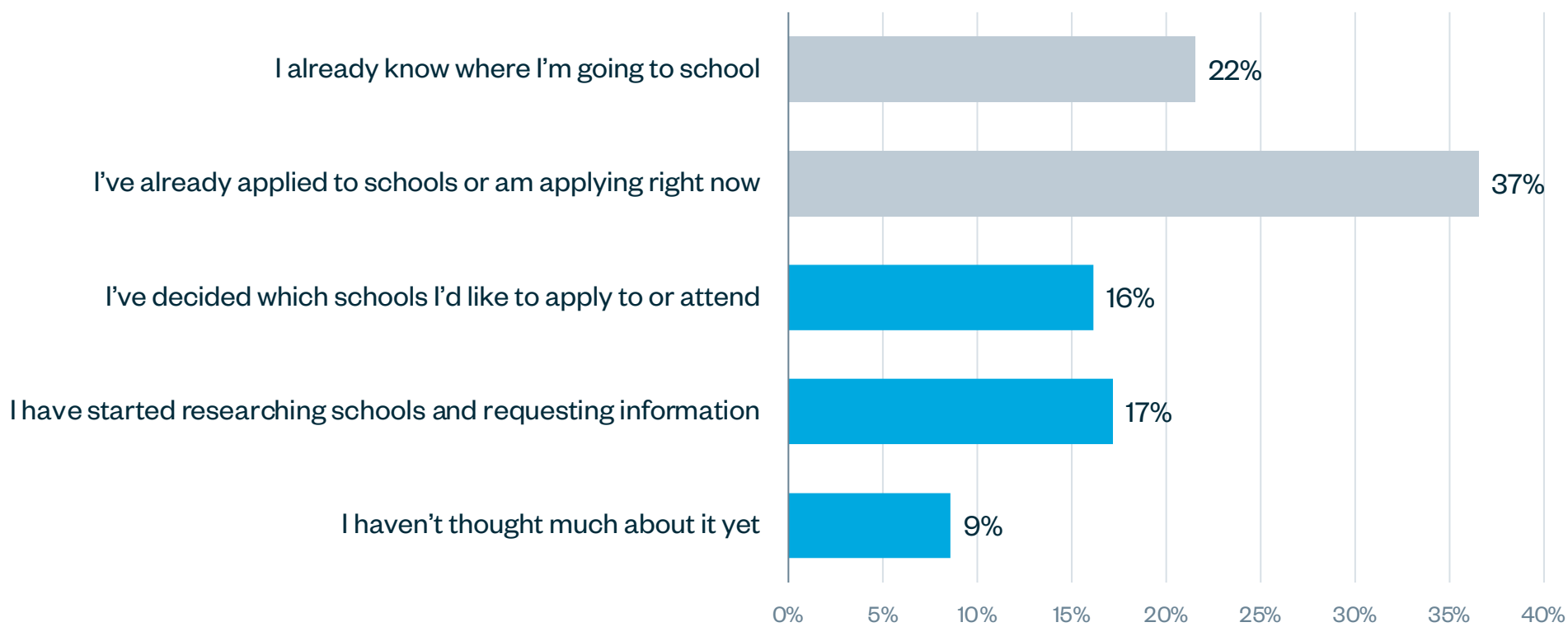
“

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 10<sup>th</sup>-17<sup>th</sup>, 2021

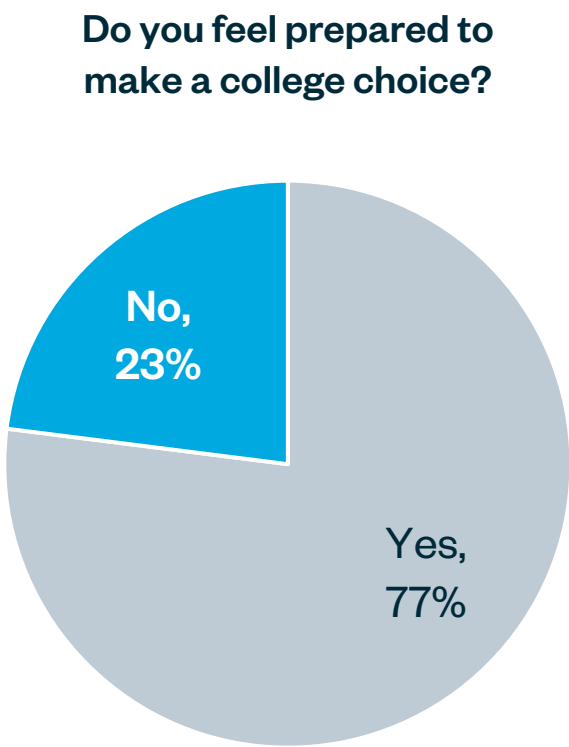


**41% of high school seniors haven't applied to any schools yet.**

**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.

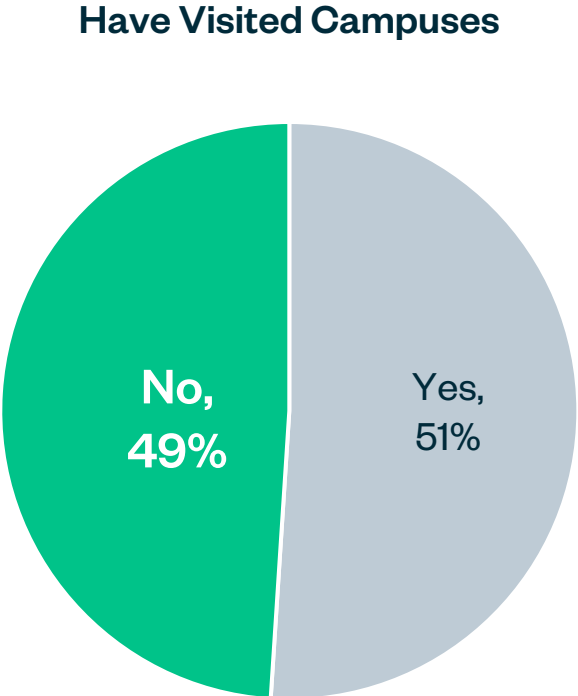
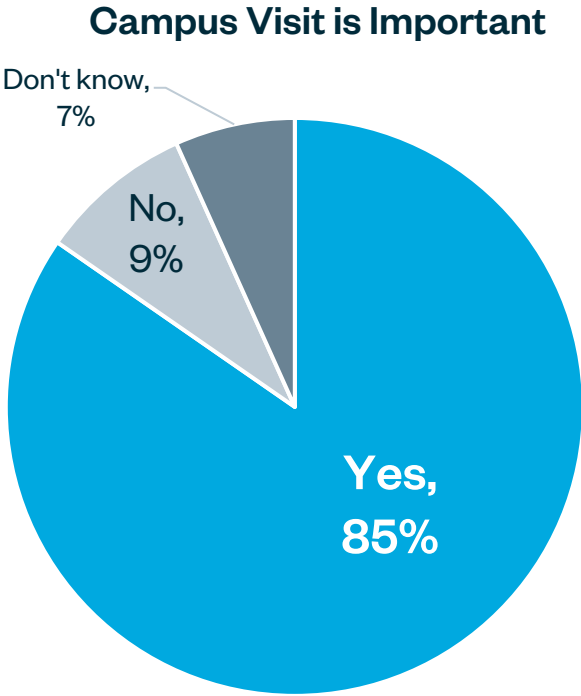
With continued uncertainty and difficulty accessing resources and support due to COVID-19, 1 in 4 high school seniors don't feel prepared to make their college choice.



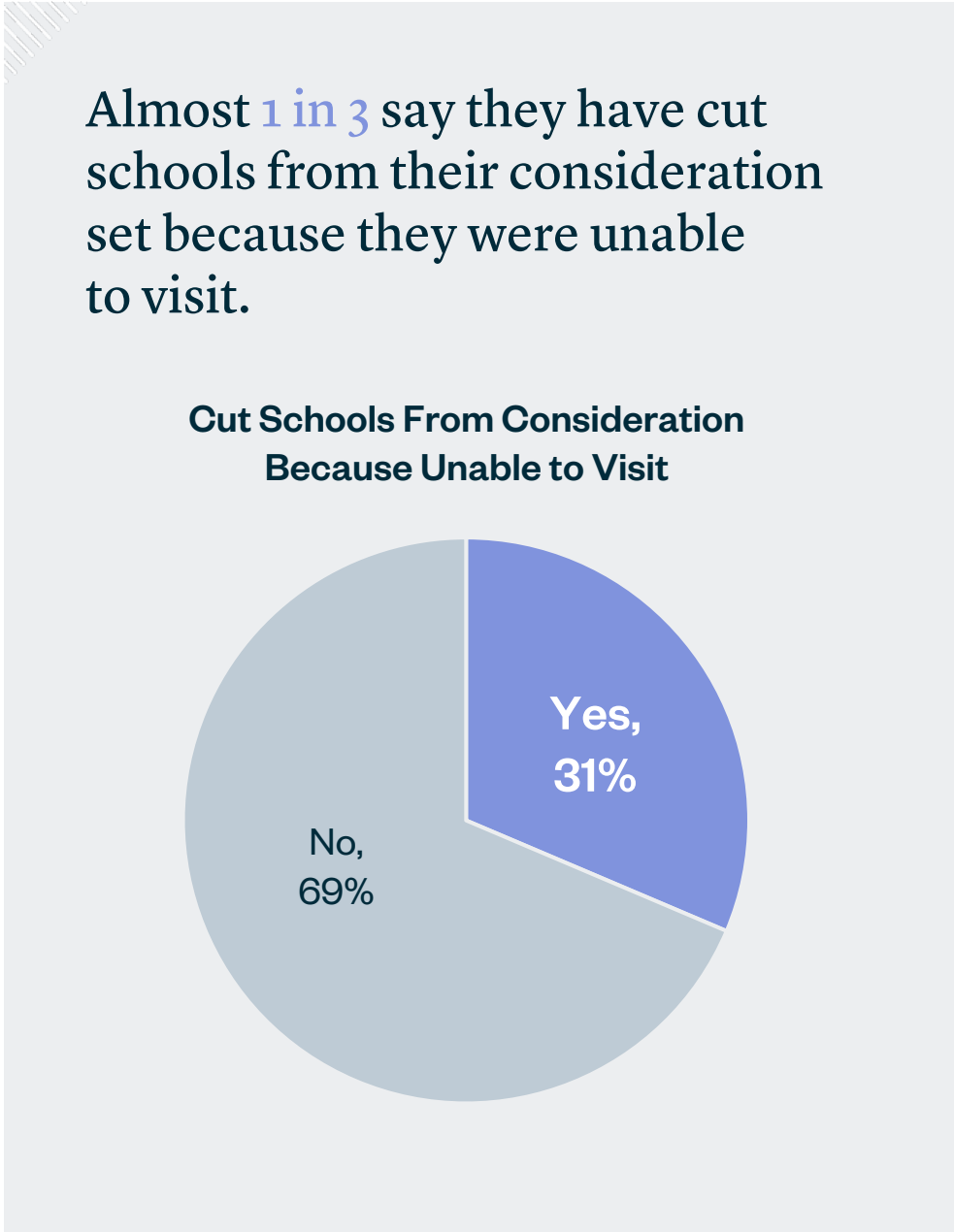
Challenges experienced by those who said they don't feel prepared to make a college choice:

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%

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.



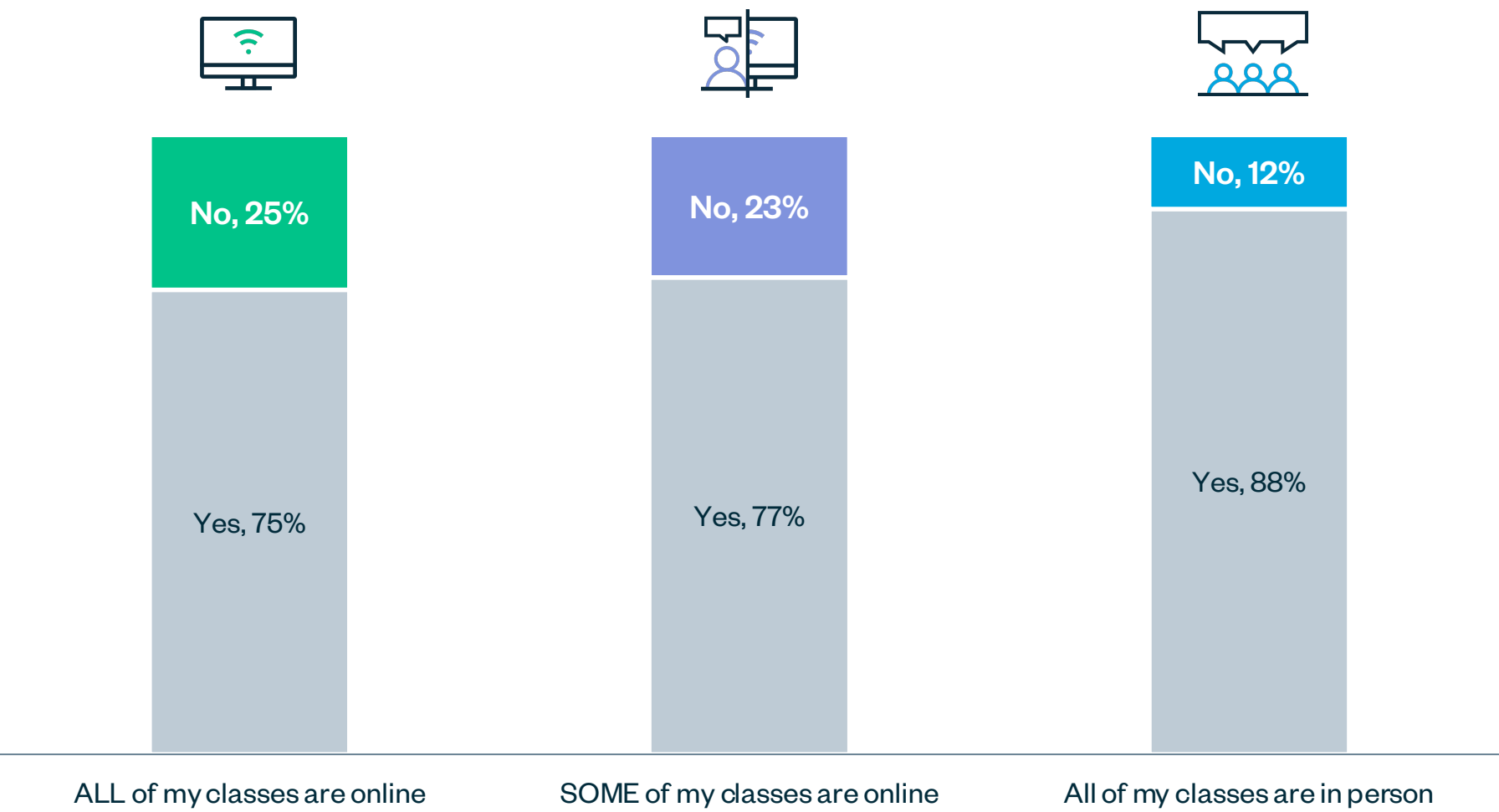
49% of seniors who think visiting college campuses is important haven't been able to visit any yet.



*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.*

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



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.”

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lated.”

“

“

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

“

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



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:  
<https://ct.counseling.org/2020/09/school-counseling-in-the-time-of-the-coronavirus/>  
<https://www.npr.org/2020/12/17/925831720/losing-a-generation-fall-college-enrollment-plummets-for-first-year-students>

1 in 4

school counselors reported spending **less time** on college counseling

1 in 2

school counselors reported devoting **less time** to career counseling

50%

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

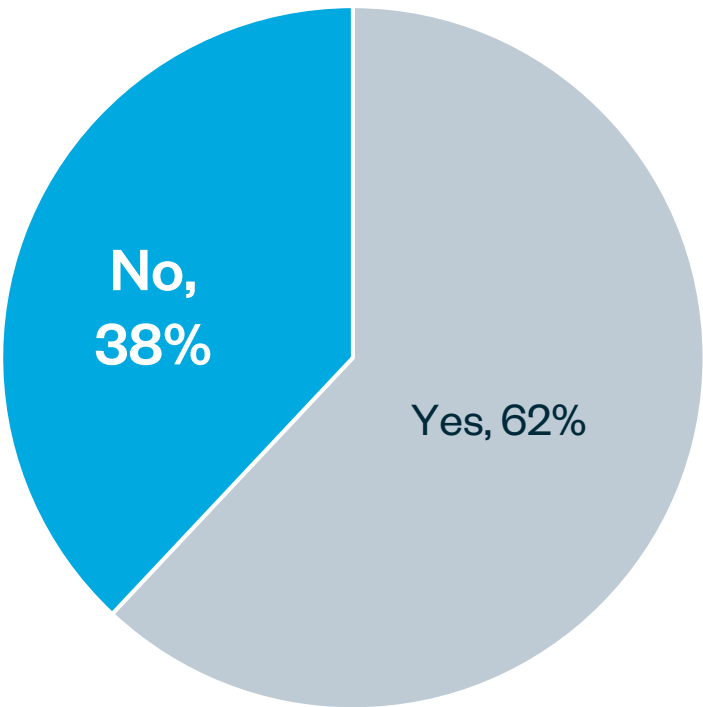
Source:  
<https://www.gse.harvard.edu/sites/default/files/documents/School-Counseling-Covid-19-Report.pdf>

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.

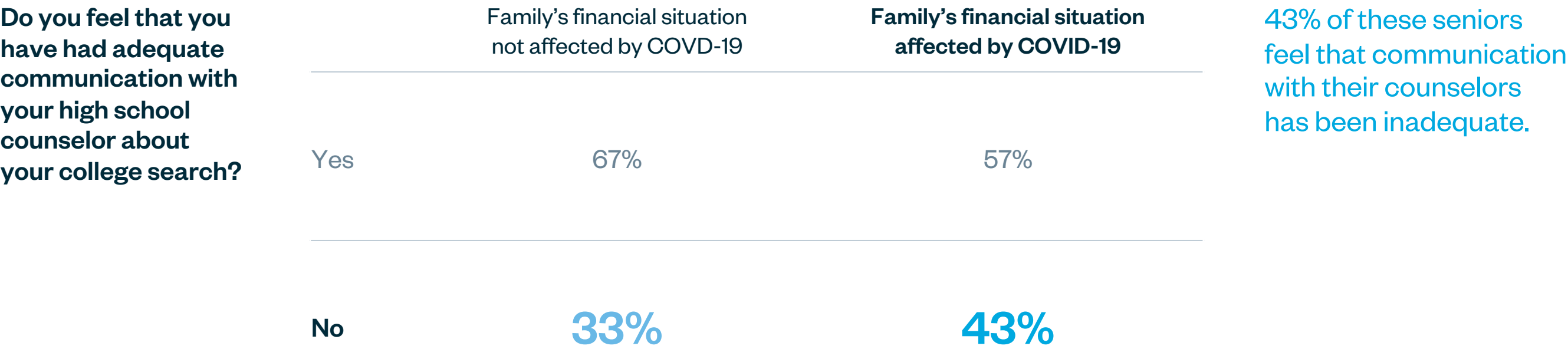
6 in 10 seniors are taking classes online only this year. For these students, communication with counselors is more of a challenge, with **44% reporting that this communication has been inadequate.**

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



	In Person/Hybrid	Online Classes Only
Yes	69%	56%
No	31%	44%

*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.*



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



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

If they DID have adequate communications from counselor



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

**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.*

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

Level of anxiety about their ability to start college in person in the fall	Inadequate communication with counselor	Adequate communication with counselor
High anxiety (7-10)	56%	44%



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 very difficult to find resources for college now.”

“

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

“

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

“

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

# 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.

“

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 through applic

“

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

“

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

“

It's definite health, and muc

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me want to e plans.”

“

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

“

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

“

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

up everything is.”

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?



Higher Ed and COVID-19

# Methodology





# Methodology Overview

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

## 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



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



# Profile of Respondents — High School Seniors 688 Respondents

## Gender Identity

Male	22%
Female	78%

## Race/Ethnicity

White, non-Hispanic	40%
Black, non-Hispanic	19%
Hispanic	24%
Asian	9%
Another race or multiracial	8%

## Home Region

Midwest	25%
Northeast	25%
South	25%
West	25%

## First-Generation College Student

Yes	28%
No	72%

## High School Type

Public	85%
Private	9%
Homeschool	5%
Other	1%

## High School GPA

A+/95 or higher/3.75 or higher	36%
A/90-94/3.5 to 3.74	25%
B+/85-89/3.25 to 3.49	13%
B/80-84/3.0 to 3.24	11%
C or lower/79 or lower/2.99 or lower	7%
Don't know	7%

## Types of Colleges/Universities CURRENTLY Considering: public, private, or both?

Public	52%
Private	9%
Both	36%
Don't know	3%

## Types of Colleges/Universities CURRENTLY Considering: in-state, out-of-state, or both?

In-state	47%
Out-of-state	21%
Both	31%
Don't know	2%

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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.



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