
Higher Ed and COVID-19

National Student Survey, Pt. III — The Fragility of Trust

Introduction

When we launched our first national student survey in March, shortly after the coronavirus outbreak came to a fevered pitch in the United States, we wanted to gauge the impact the pandemic was likely to have on traditional, 4-year residential higher education enrollment in the fall. We replicated our study a few weeks later, in mid-April, as domestic cases soared past 1 million, and found that the outlook for traditional 4-year institutions was dire.

In the third wave of our study, conducted in late July, we wanted to see if students had become any more settled in their fall plans, gauge their perceptions of their institutions' reopening models, and ask how they will adhere to COVID-19 safety precautions when and if they do return to campus.

02 Introduction

04 Key Findings

All enrollment is highly volatile.

Students don't fully trust their institutions or fellow students to keep them safe.

Students are worried they'll contract the virus.

Issues of race and inequity are exacerbated by COVID-19.

Effective communications are essential for brand trust.

33 Methodology

Over the past five months, the global health crisis caused by the novel coronavirus has fundamentally changed the way we live, work, and learn. Our previous studies in March and April helped us to understand how student perceptions were evolving, but with domestic cases again on the rise this summer, and colleges and universities sifting through hundreds of contingency plans, we need to know what students are thinking right now. Are they still planning to attend school this fall? Are they worried about contracting the coronavirus? Will they follow the rules?

This all comes on the heels of several years of waning public confidence in higher education, primarily around the issues of access and affordability. This pandemic has put those issues under a microscope and exacerbated public scrutiny. As students and their parents grapple with how to pursue their college plans amidst a global pandemic, the data indicate that students' trust in their institutions is fragile.

One thing is certain—higher education cannot afford to mishandle the fall semester. Despite their extraordinary work this year in creating live dashboards tracking the virus as it spreads across our country, innovating new ways to manufacture personal protective equipment at scale, and developing a vaccine for the virus itself; institutions still face an uphill battle. They will be forced to make a myriad of impossible decisions this fall, and they must commit to doing so with full transparency and brutal honesty, otherwise they risk doing irreparable damage to their brands. Make no mistake — this fall will be highly volatile and completely unpredictable. This is why we'll continue to conduct research, as we work through this crisis together and find ways for higher ed to thrive once again.

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

We build brands that inspire and endure.

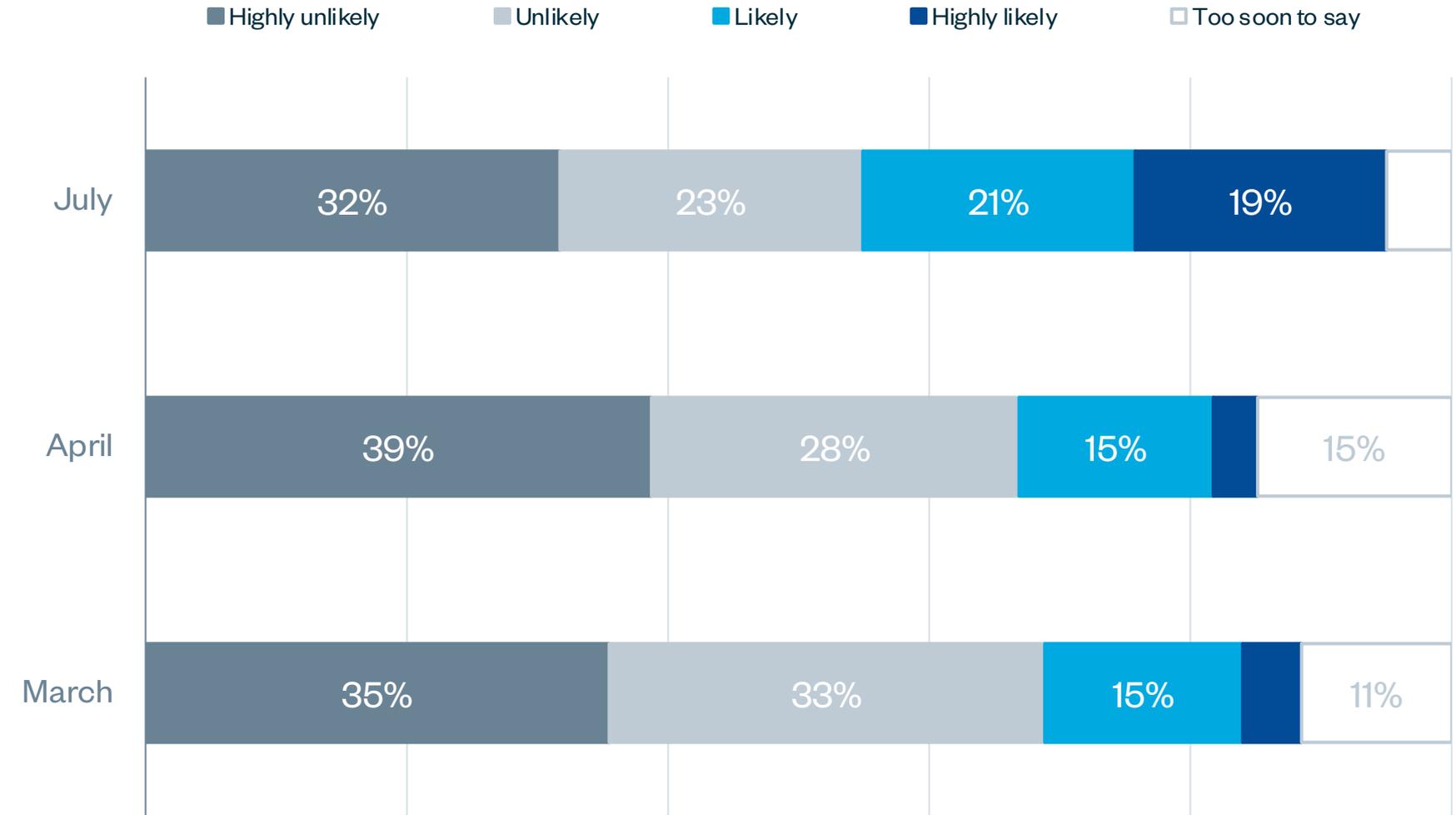


All enrollment is
highly volatile.

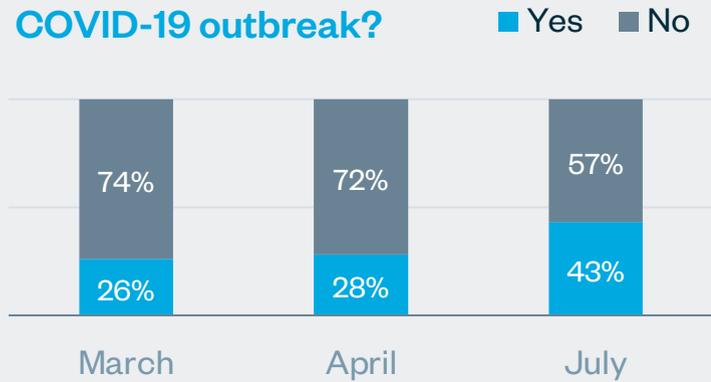
Freshmen may not show up at all.

40% of incoming freshmen say that it is [likely](#) or [highly likely](#) they will NOT go to college in the fall.

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



Has your college choice been affected in any way by the COVID-19 outbreak?

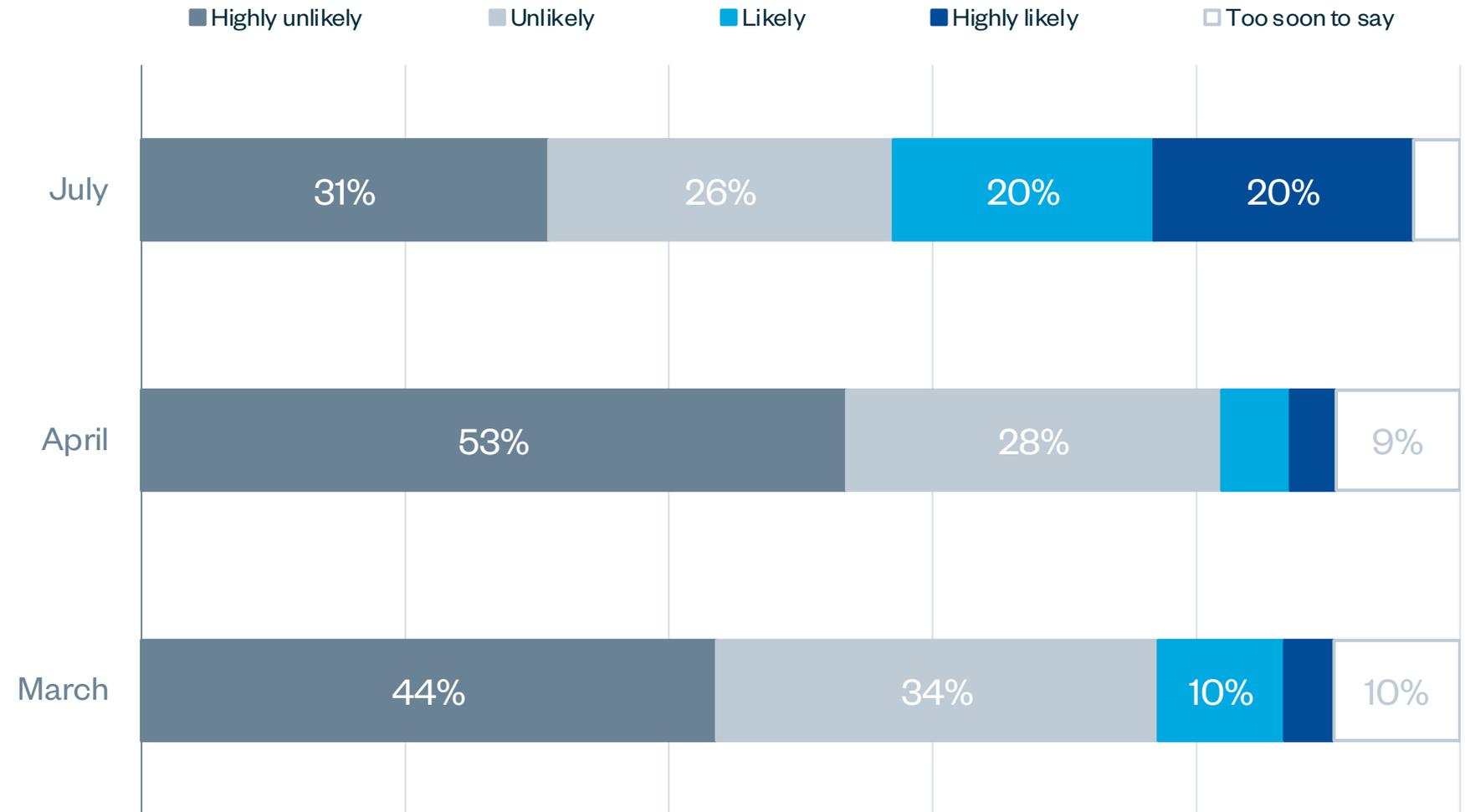


Freshmen may still choose a different school.

40% of incoming freshmen say that it is **likely** or **highly likely** they will still change their minds about which college to attend.

Students planning to attend a private school are more likely to say they are likely or highly likely to change their mind (50%) vs. students planning to attend a public school (32%).

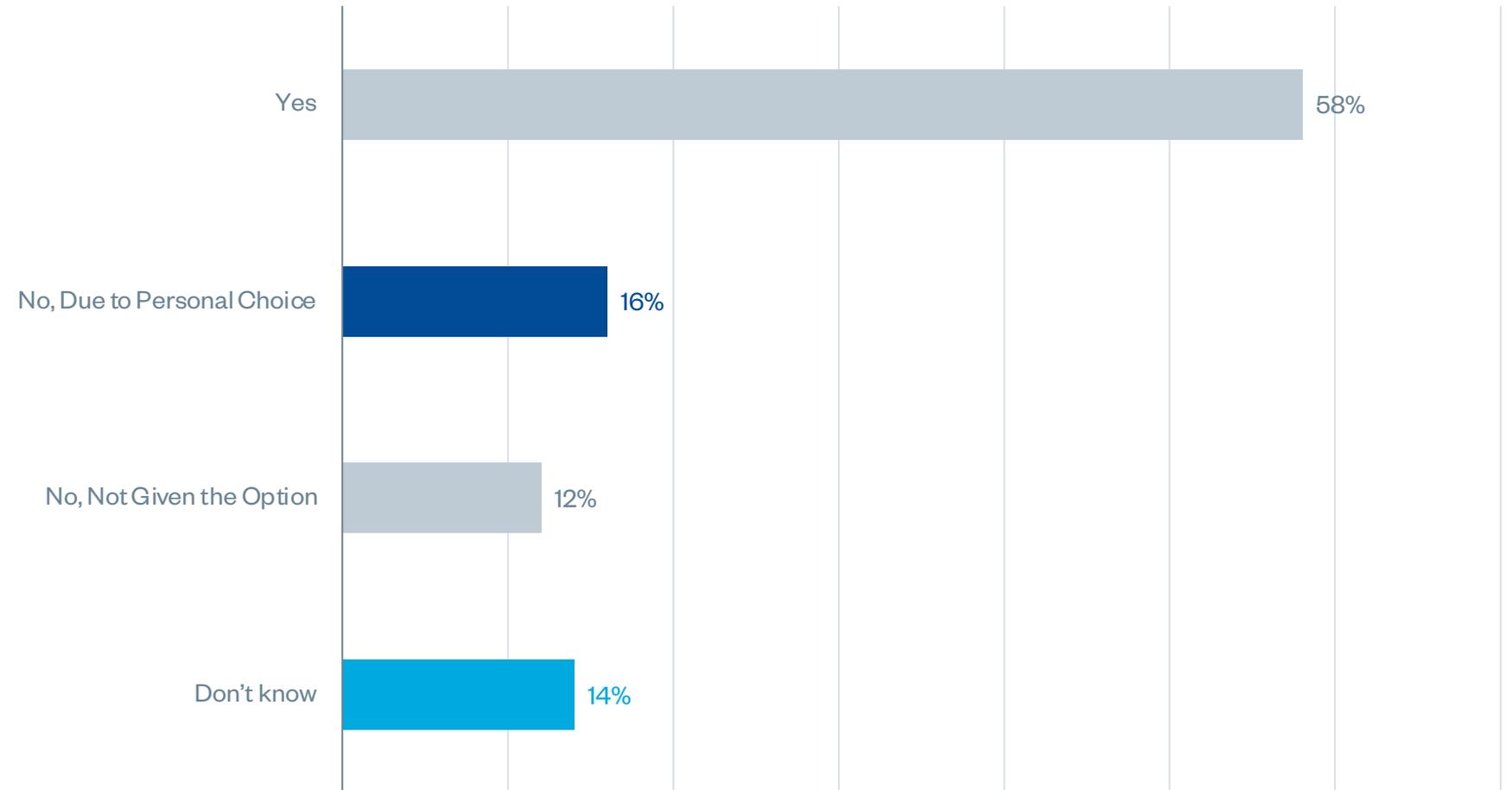
How likely are you to change your mind about the college you want to attend as a result of the COVID-19 outbreak?



Returning students may make the choice to stay home.

A combined 30% of returning students who have the option to return to campus say they will NOT return due to personal choice, or report that they still aren't sure.

Returning Students: Are you currently planning to return to your college/university campus for in-person instruction this fall?



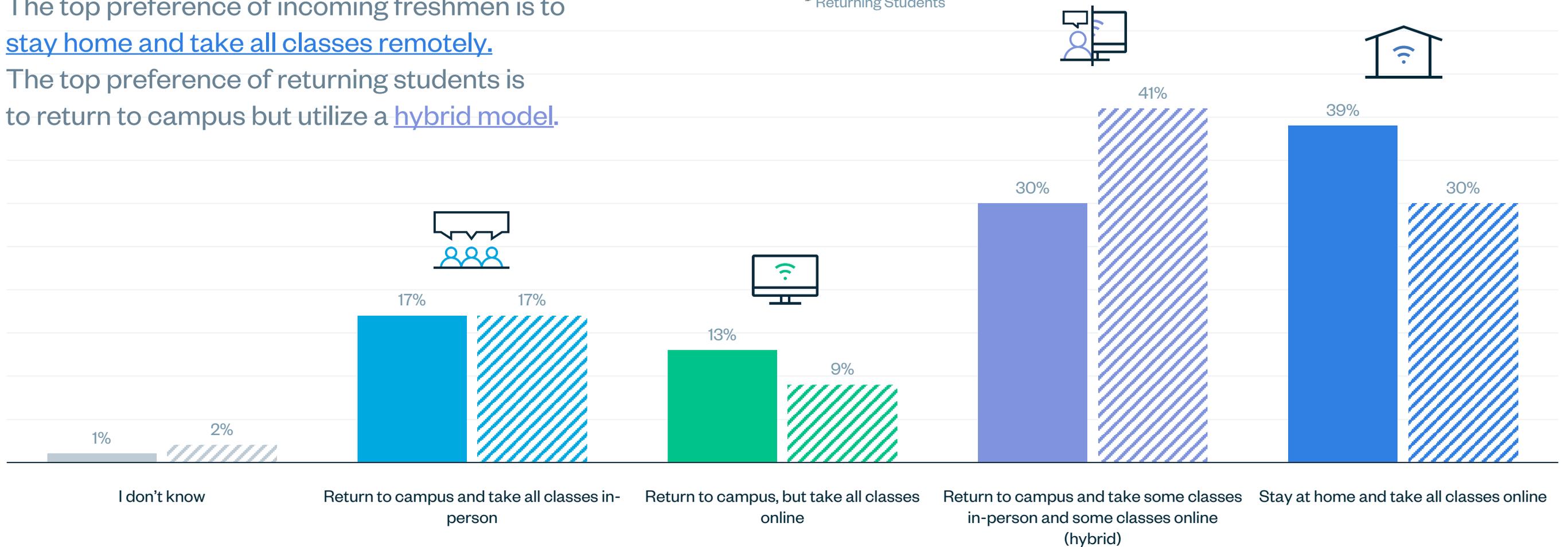
Students have mixed feelings about returning to campus.

The top preference of incoming freshmen is to [stay home and take all classes remotely.](#)

The top preference of returning students is to return to campus but utilize a [hybrid model.](#)

If you had to choose from one of the following options for instruction this fall, what would be your top choice? (select one)

- Incoming Freshmen
- ▨ Returning Students



What the Data Are Telling Us —

Students are highly uncertain about their fall plans — even with the start of classes right on the horizon.

Colleges and universities must consider that many students who have committed to their institution (and even made deposits) might still change their minds. The incoming freshmen class is especially volatile, with only 31% of freshmen indicating that they're strongly committed to their current institution of choice.

Our Recommendation

Your students need tailored, empathetic communications about what to expect this fall, how they can still be a part of the campus community even if classes go virtual, and why the promise of your institution hasn't changed despite this pandemic. No matter what, they aren't going to have the “real” student experience, making it essential that you deliver a unique and special alternative experience in its place.

Do not underestimate the power of personal outreach, and be transparent and honest in responding to their fears and uncertainties about the upcoming semester. Incoming freshmen always have some level of naïveté about the realities of living and learning on a college campus, and that culture shock is sure to be exacerbated by the heightened fear and anxiety they're experiencing because of the pandemic. Students are going to need support and compassion, whether they are physically on your campus or taking classes remotely.

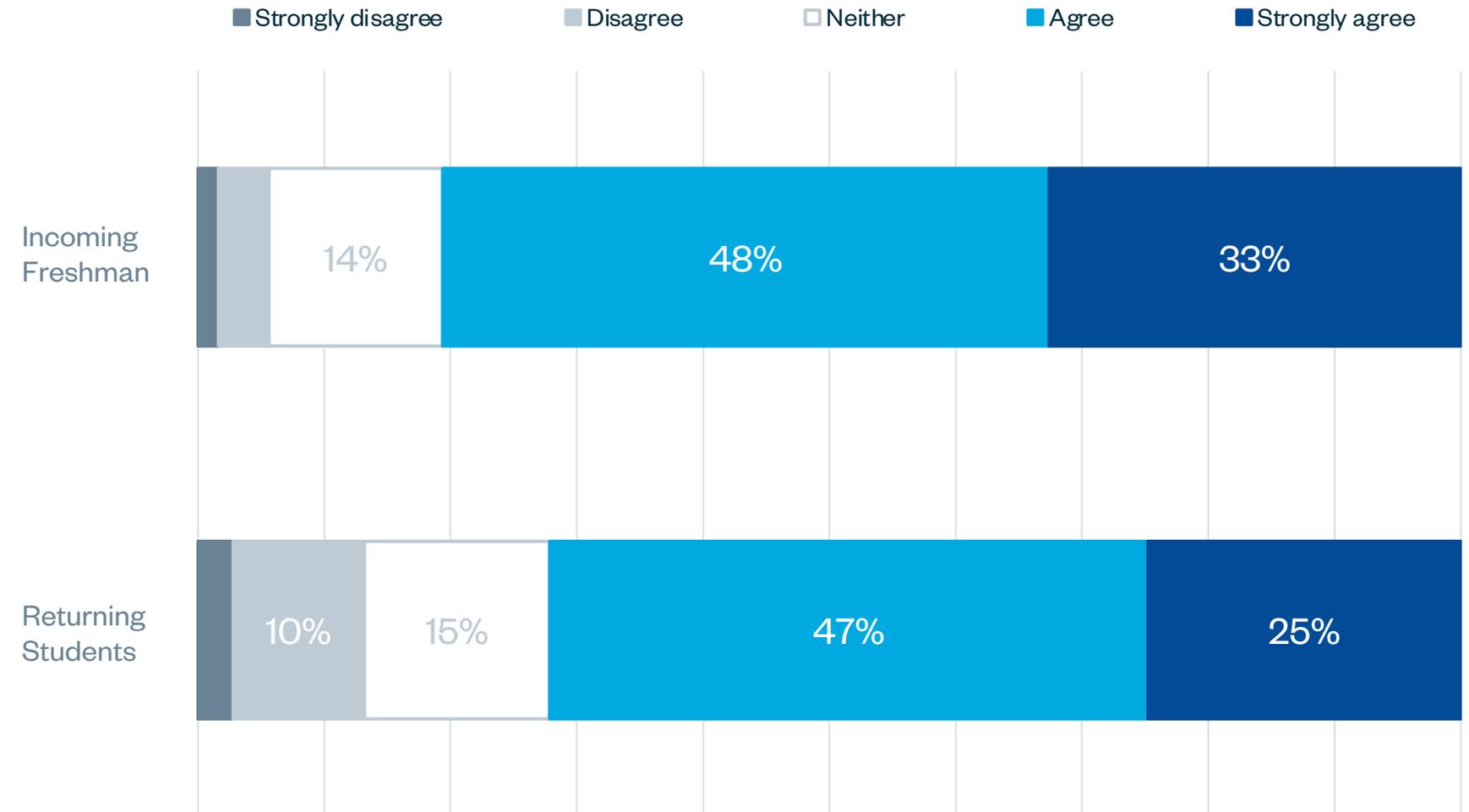
And remember, freshmen are making these decisions alongside their parents — don't forget to consider their needs in your communications.

Students don't fully trust their institutions or fellow students to **keep them safe.**

Students don't fully trust their institutions or fellow students to keep them safe.

Returning students have a lower trust level than incoming freshmen.

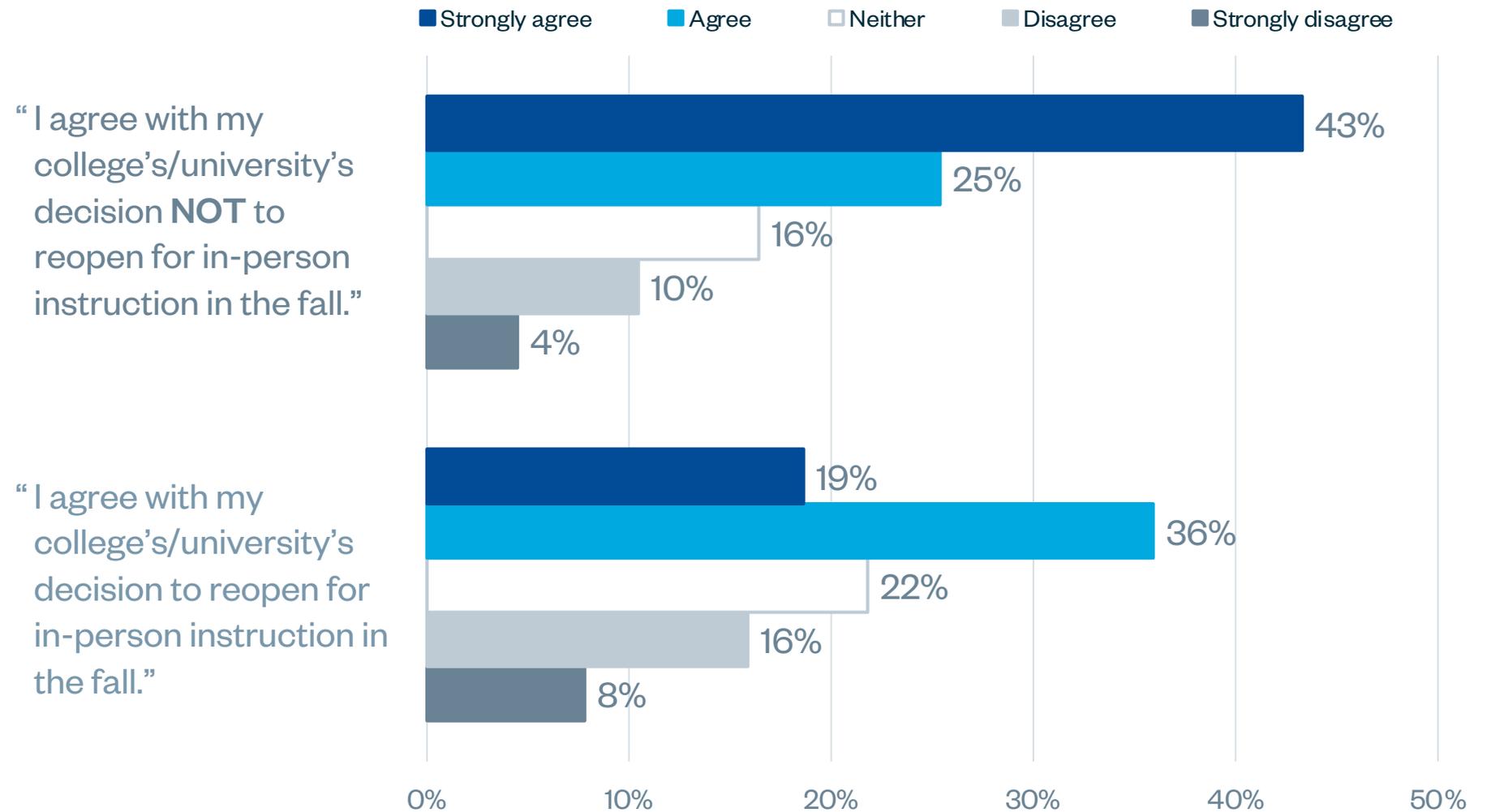
% Agreement: I trust my college/university to take the necessary precautions to keep students safe



There is mixed support for college reopening plans.

Returning students whose institutions decided **NOT** to reopen for in-person instruction are twice as likely to strongly agree with the decision than students whose institutions decided to reopen.

Rate your level of agreement with each of the following statements:



Our Recommendation

Political preferences aside, New York Governor Andrew Cuomo instilled confidence in his constituents by hosting a press conference every day for 96 days and being brutally honest about the situation they were in, the metrics he consulted, and the goals they shared.

You don't need to hold daily press conferences through the fall, but you should lead with transparency and honesty to build students' trust in your institution in the long term. People will be far more understanding of the circumstances beyond your control when you are transparent with your decision-making and share your data with the campus community.

Provide your students, their families, faculty, and staff with the metrics you are using to make your decisions. Whether that's an incidence rate threshold, the daily number of tests your institution needs access to and their turnaround periods, or even campus infection rates, transparency breeds trust. At a time when tensions are high and reputations are on the line, you must lead with bold transparency and brutal honesty.

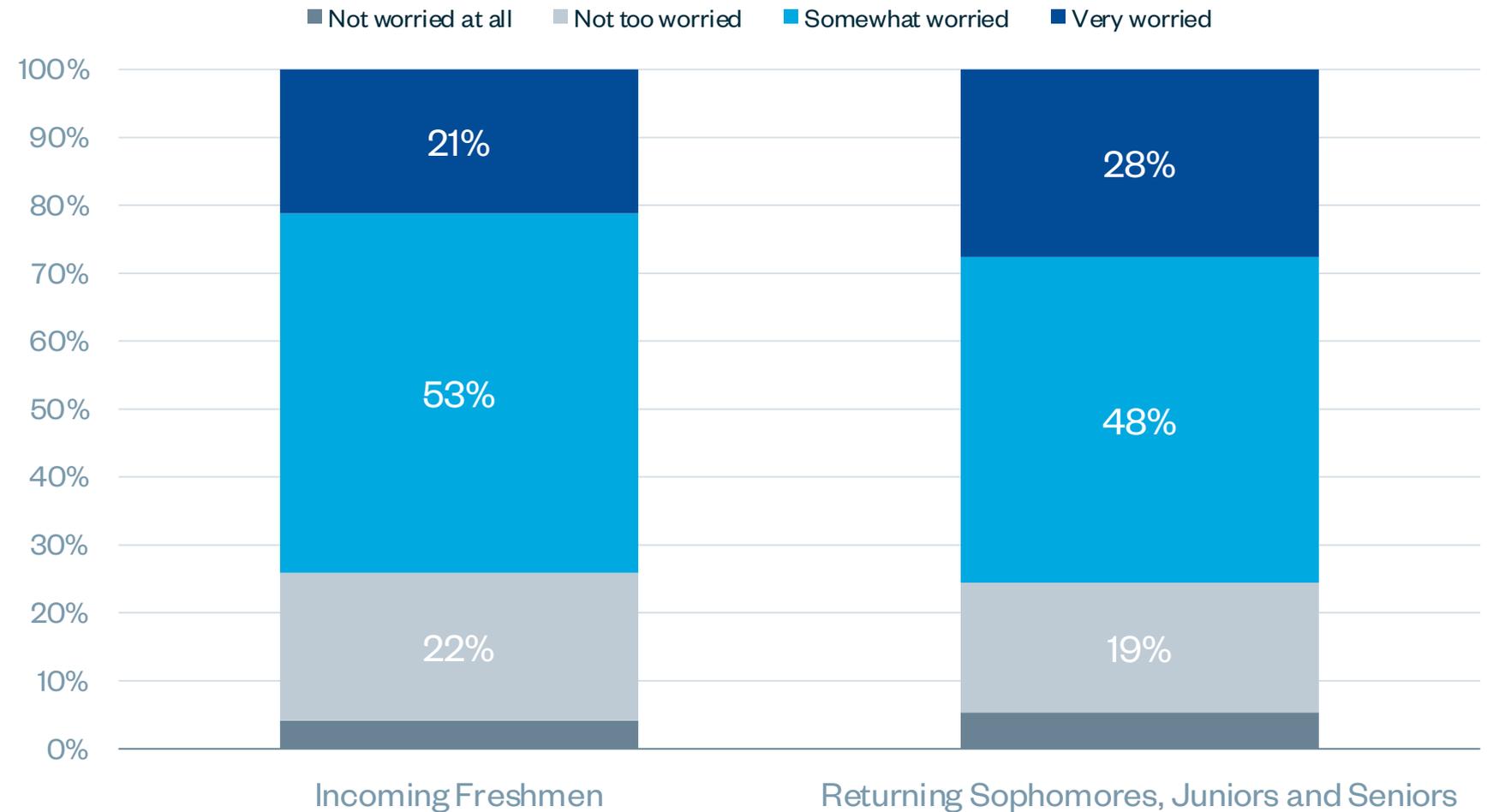


Students are **worried**
they'll contract the virus.

Students are worried they'll contract the virus.

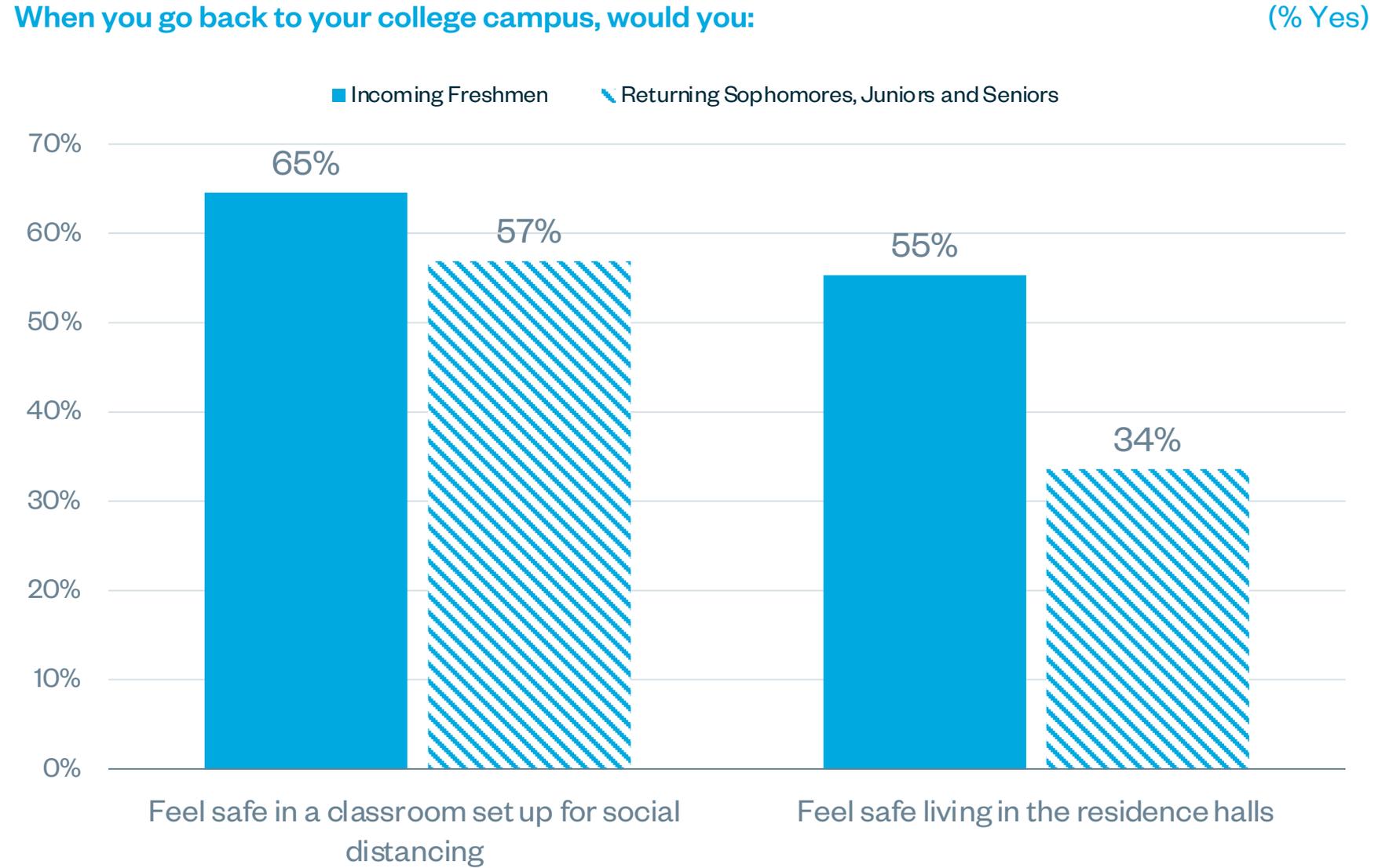
3 in 4 students are somewhat or very worried that they'll contract the virus upon returning to campus.

How worried are you that you might contract COVID-19 if you return to your college/university campus for in-person instruction in the fall?



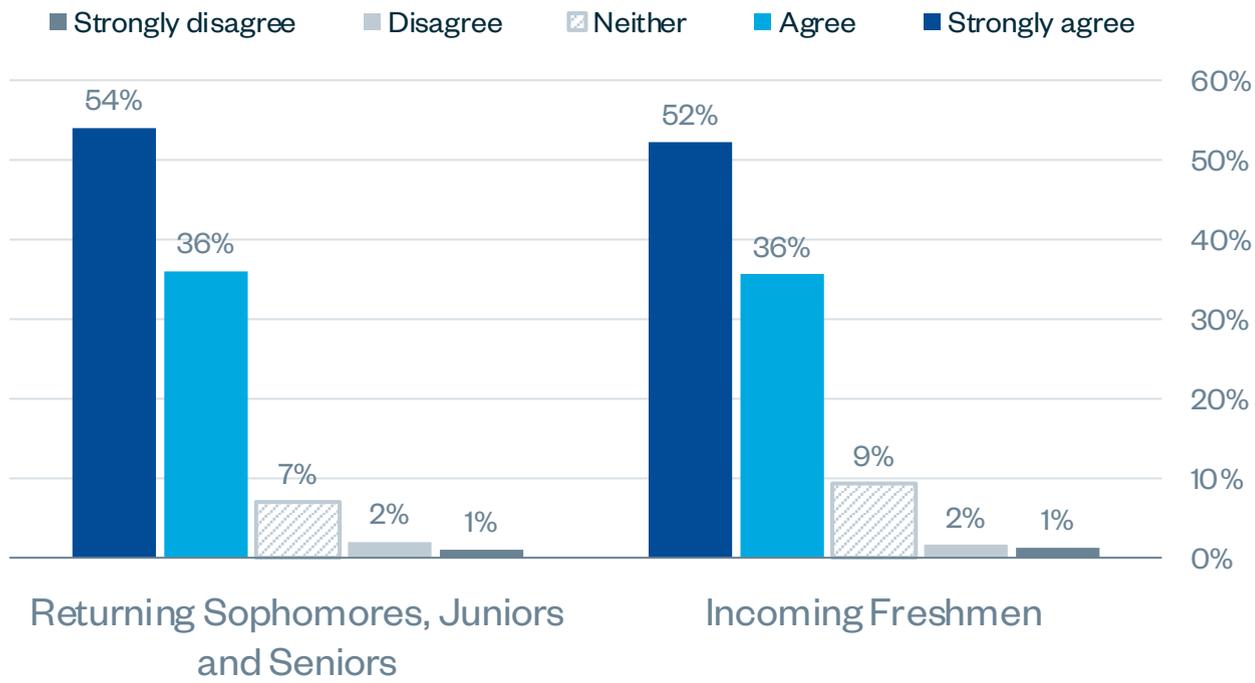
Students have mixed feelings about COVID-related safety on campus.

43% of returning students don't feel safe in a socially distanced classroom. 66% don't feel safe living in residence halls.



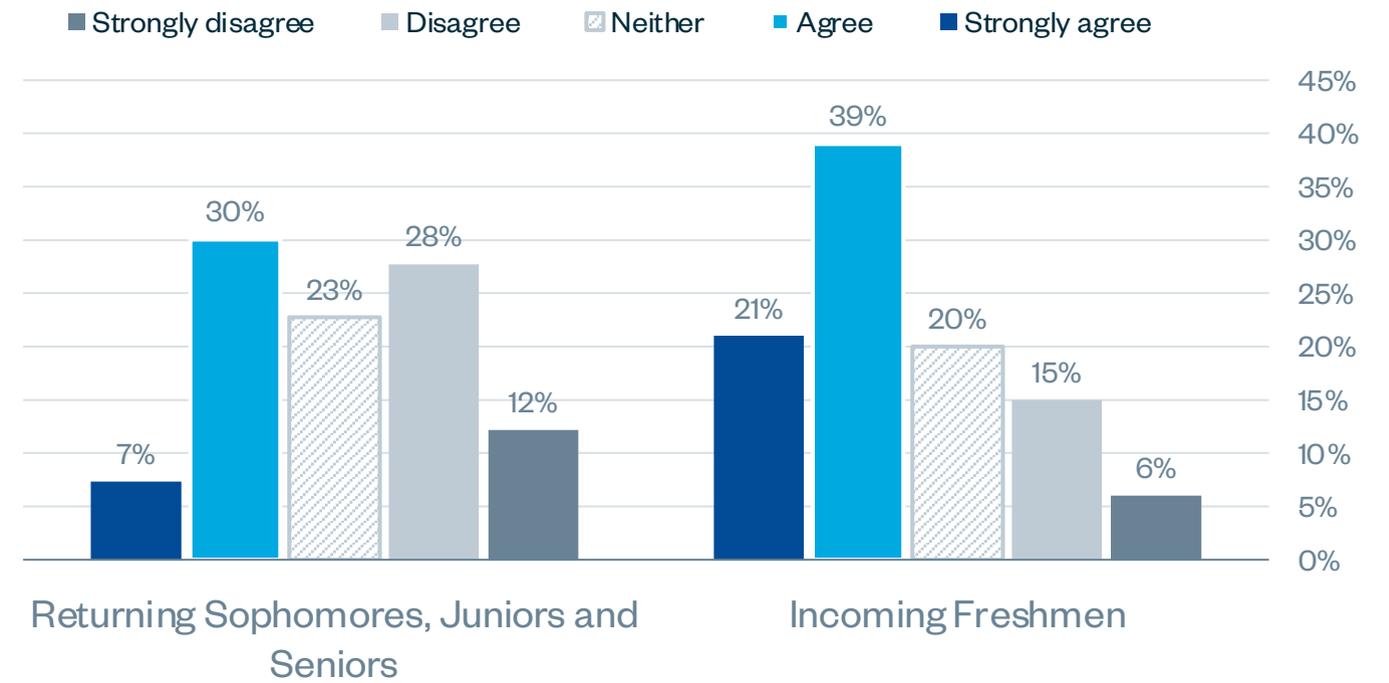
Just over 50% of students strongly agree to follow COVID guidelines.

% Agreement: I will follow my college's/university's COVID-19-related guidelines



Just 7% of returning students and 21% of incoming freshmen strongly agree that they trust their fellow students to follow COVID guidelines.

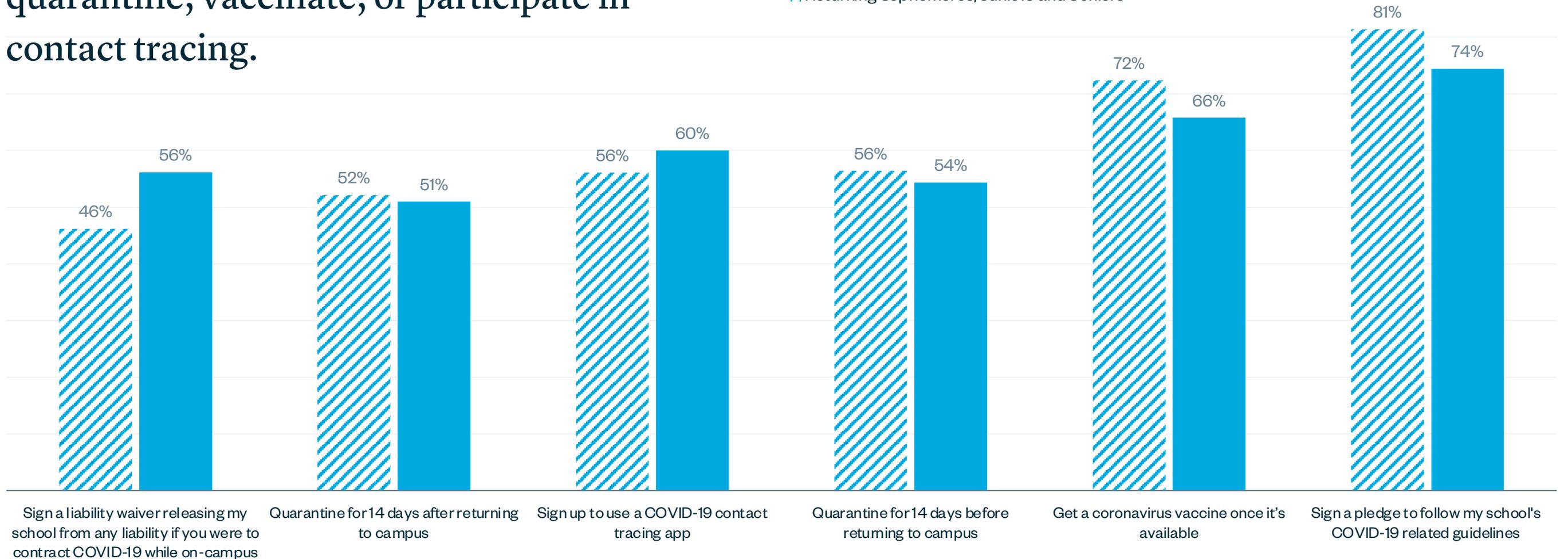
% Agreement: I trust my fellow students will follow my college's/university's COVID-19-related guidelines



Most students will sign a pledge, but that doesn't line up with their willingness to quarantine, vaccinate, or participate in contact tracing.

When you go back to your college campus, would you: (% Yes)

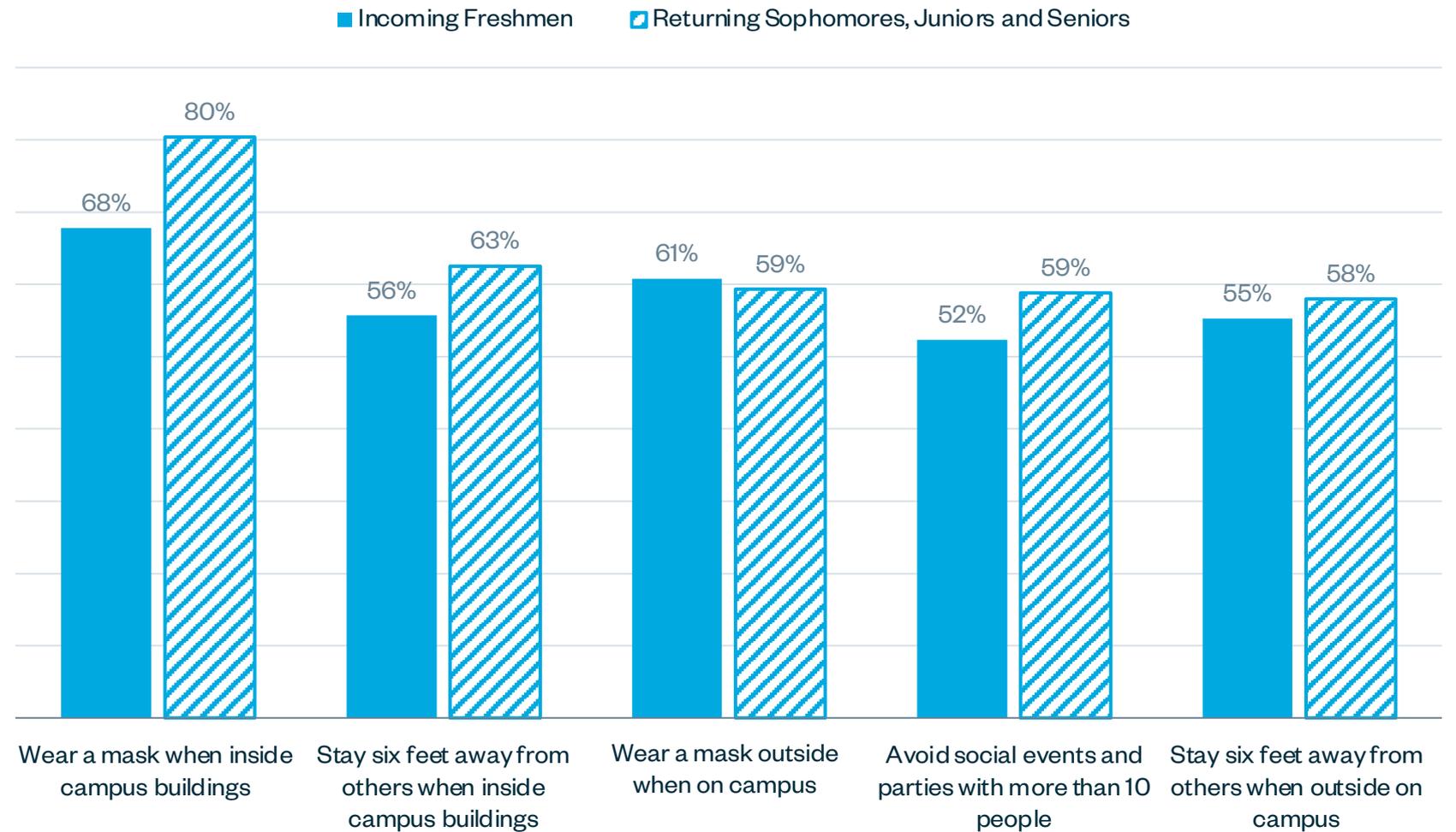
- Incoming Freshmen
- ▨ Returning Sophomores, Juniors and Seniors



Even though most students say they will always wear a mask inside campus buildings, they are less likely to take other safety precautions.

Social distancing, masks, and contact tracing have become common practice for many of us, but even after months of hearing about the importance of these measures, a significant percentage of students say they will not always practice them (and this is before they have even returned to campus).

When you go back to your school's campus, how often will you do each of the following? (% Always)



Our Recommendation

The data indicate that it will not be enough for colleges and universities to simply provide COVID guidance — they must enforce compliance.

While students generally agree to adhere to COVID guidelines, they display a significant level of cognitive dissonance when asked about specific safety precautions such as social distancing, contact tracing, and avoiding social events with more than ten people.

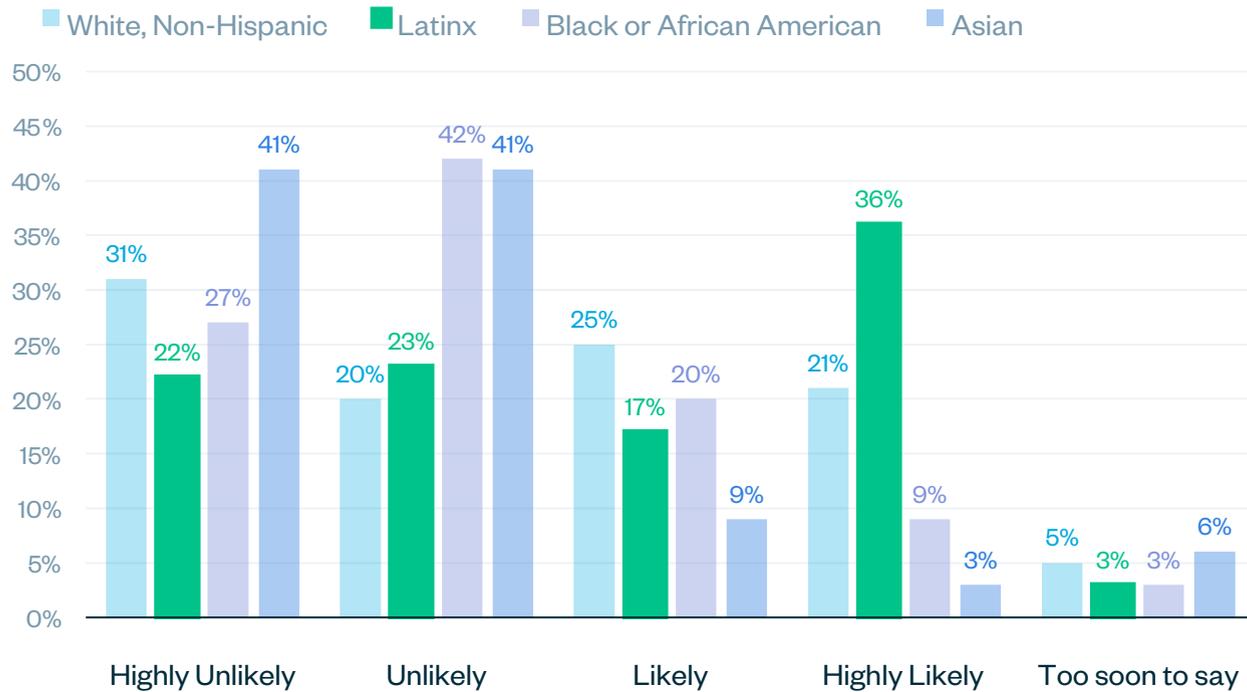
With institutions already grappling with declining levels of student and public trust, it's imperative that they do everything in their power to ensure a safe campus environment. However, they must also be realistic with their expectations for 100% compliance, and take that into account when making decisions in the best interest of everyone's safety. With 1 in 4 incoming freshmen indicating that they won't even sign a pledge to follow guidelines, institutions that choose to reopen for in-person instruction must have an action plan in place to immediately deal with non-compliance.



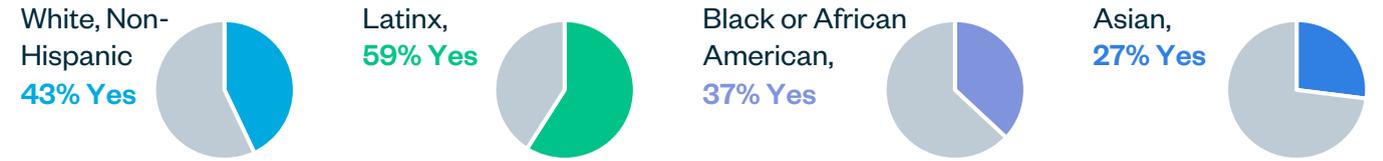
Issues of race and inequity are
exacerbated by COVID-19.

Incoming Latinx freshmen have been more impacted by COVID, and are more likely to change their minds about their institution (or not go to college at all).

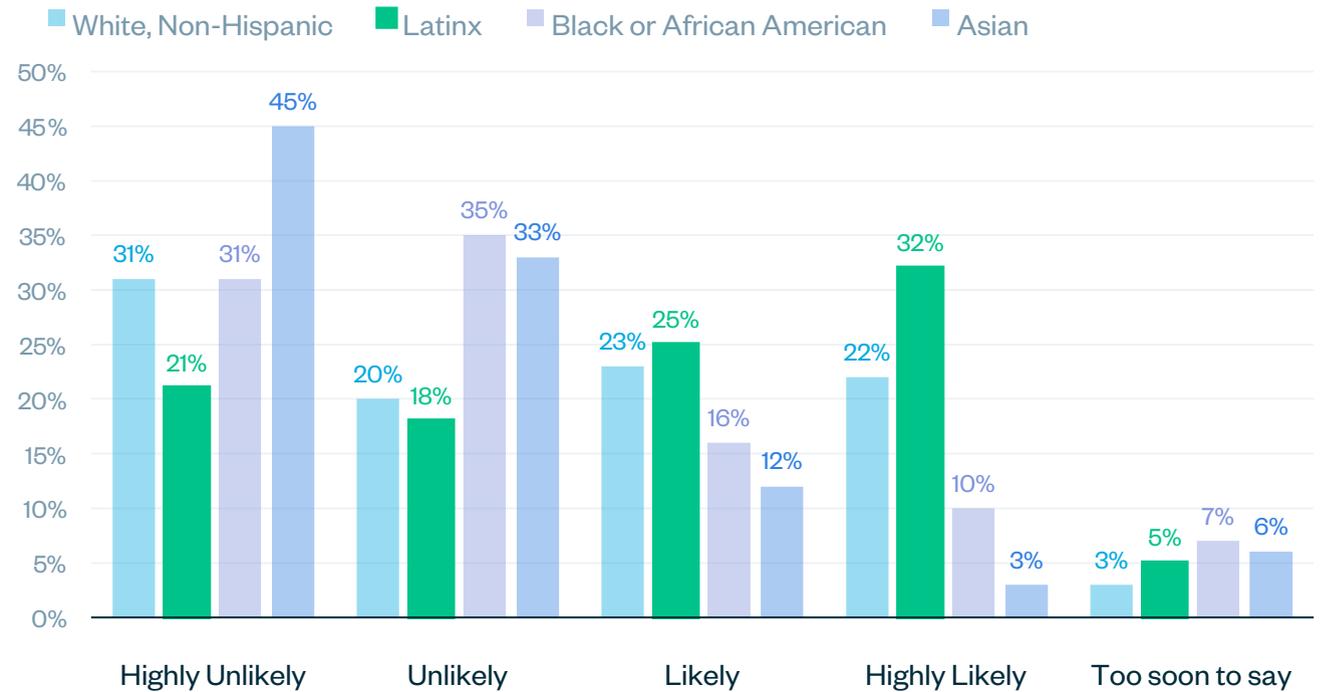
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Has your college choice been affected in any way by the COVID-19 outbreak?

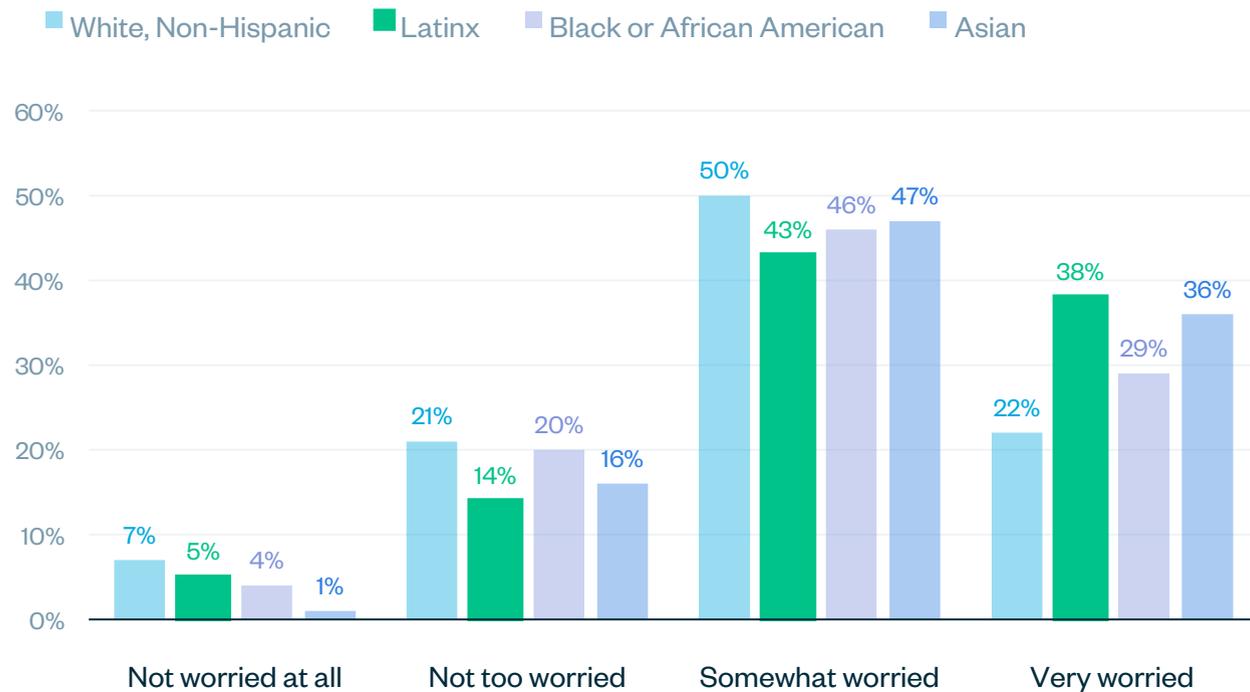


How likely is it that you will NOT go to college next term because of the COVID-19 outbreak?

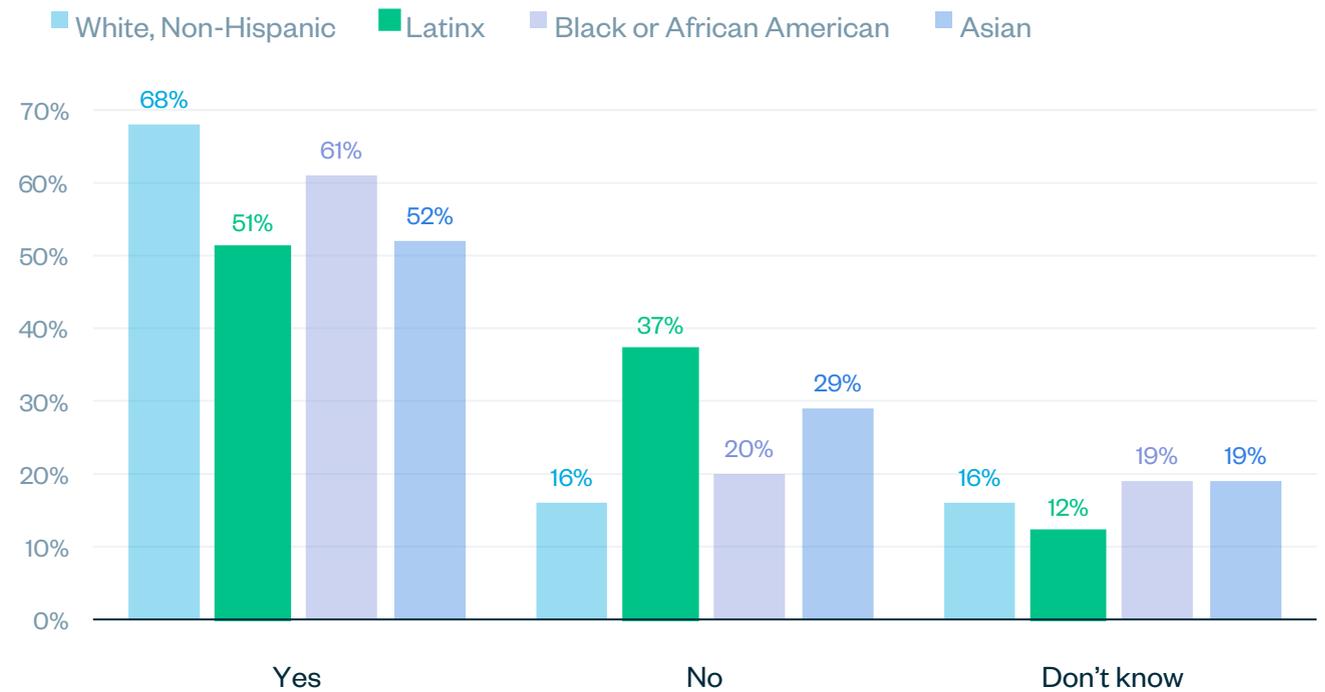


Returning Latinx and Asian students are more concerned about contracting the virus and less likely to return to campus for in-person instruction in the fall.

How worried are you that you might contract COVID-19 if you return to your college/university campus for in-person instruction in the fall?

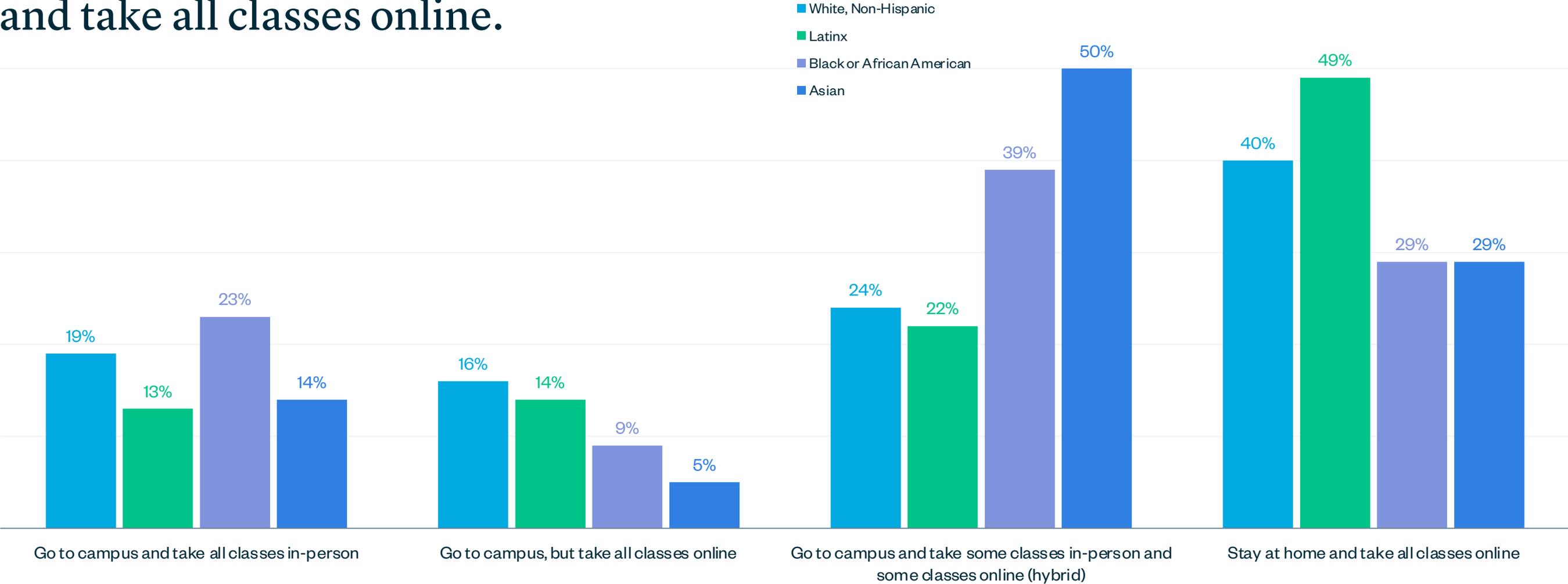


Are you currently planning to return to your college/university campus for in-person instruction this fall?



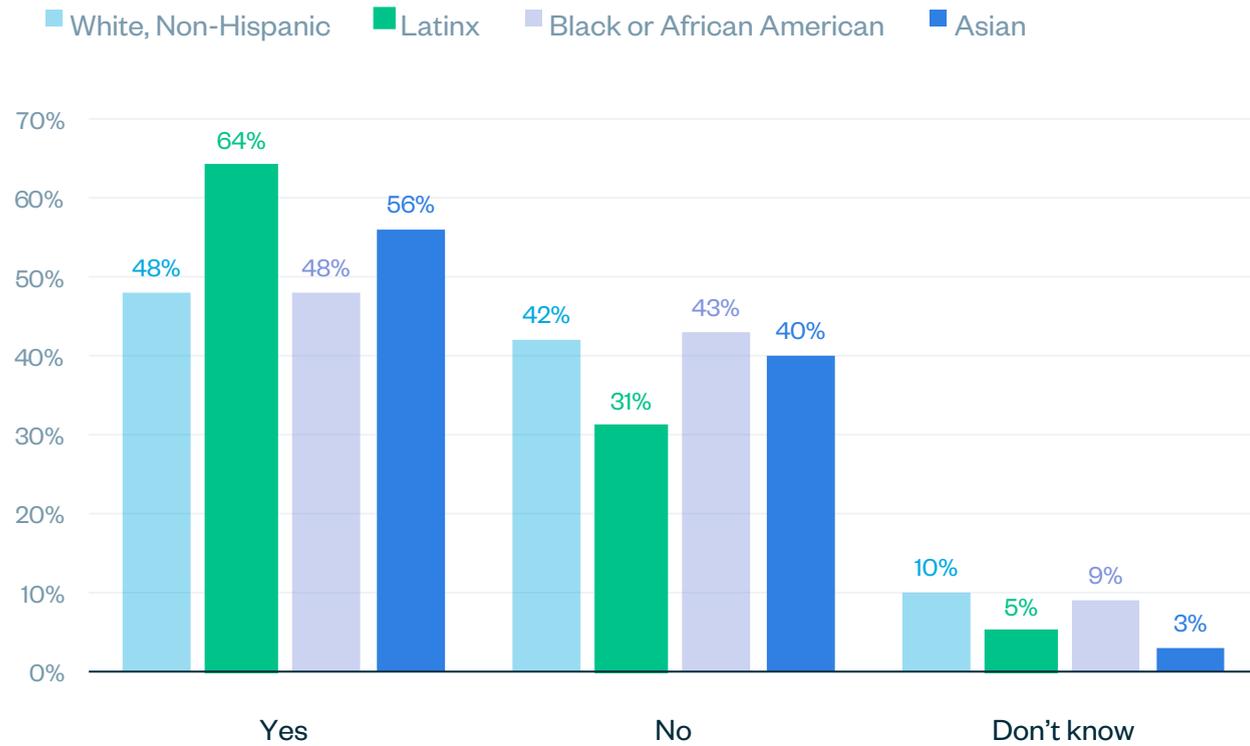
Nearly half of incoming Latinx freshmen would prefer to stay home and take all classes online.

If you had to choose from one of the following options for instruction this fall, which would be your top choice?

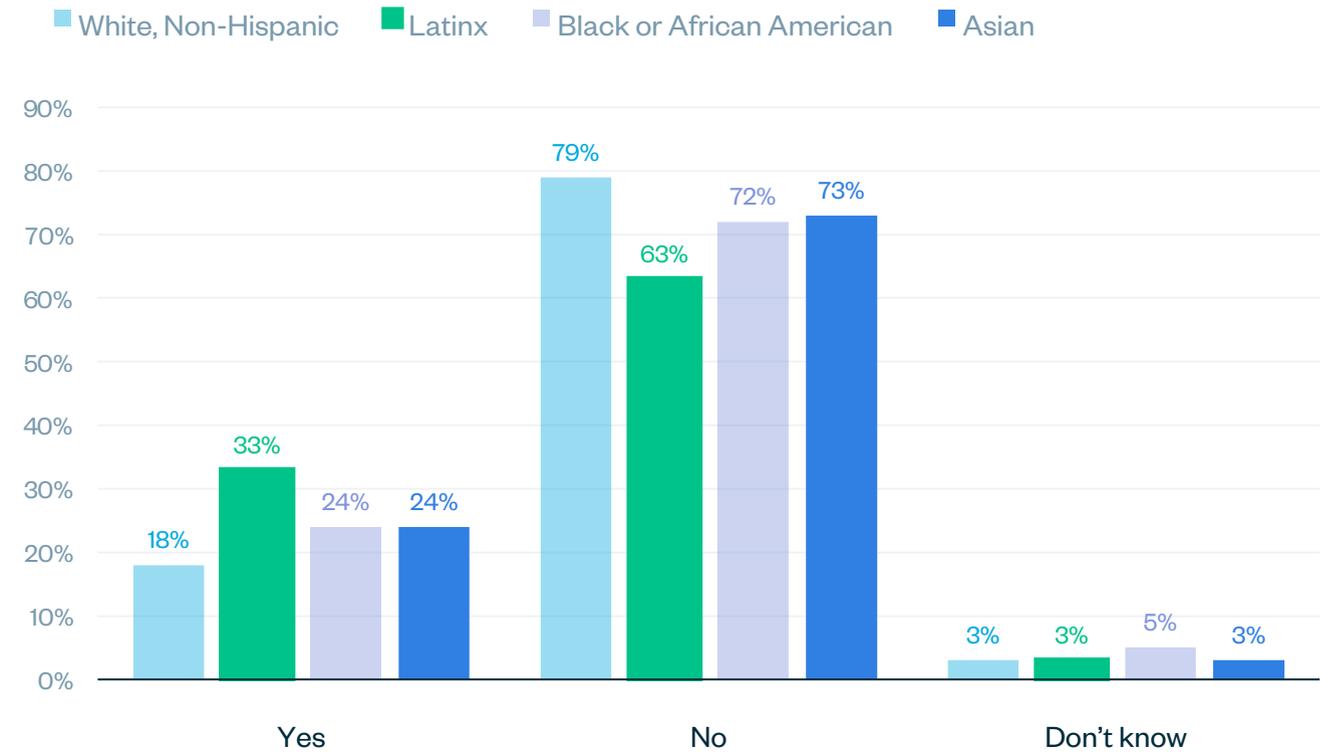


Returning Latinx and Asian students have been more financially impacted by COVID.

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



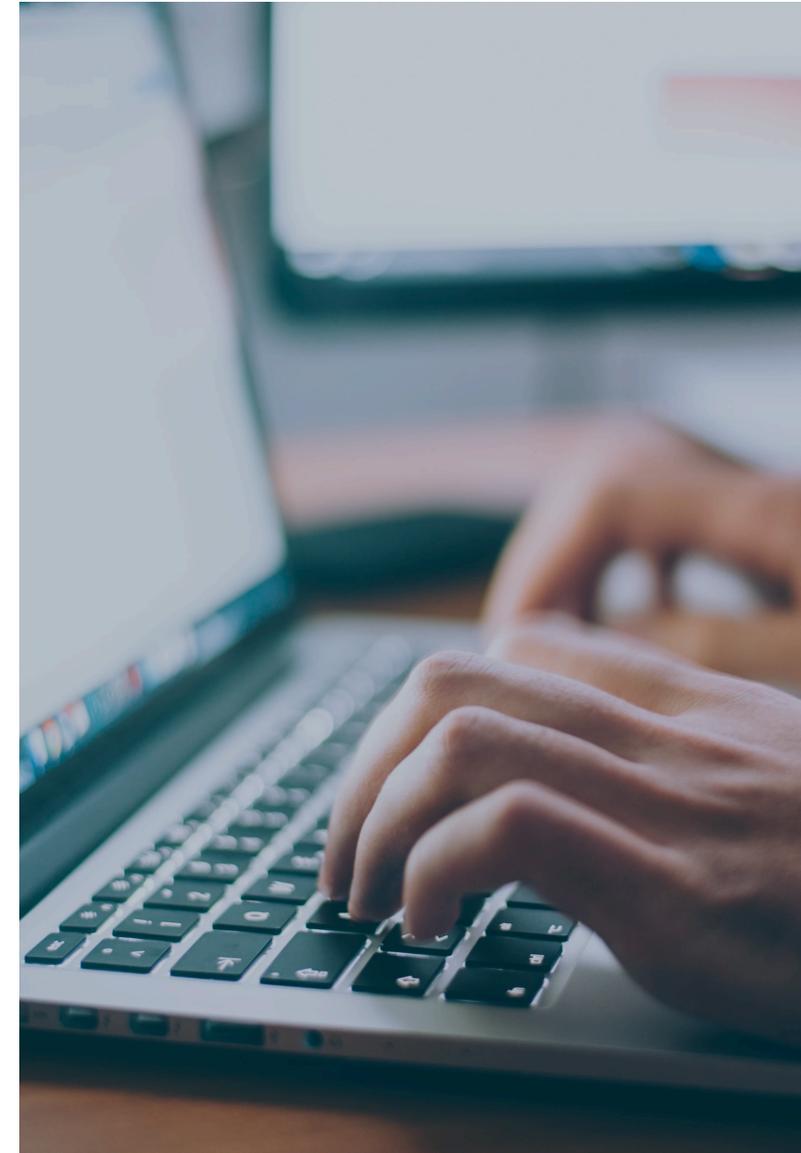
Have any of your parents/guardians been laid off or furloughed?



Our Recommendation

Students show up to campus each fall for an education that will enhance their opportunities, and we value the idea that once they're on campus, they have access to these opportunities regardless of where they come from, the circumstances they're born into, the color of their skin, and even — thanks to Pell Grants — how much money they or their parents make. COVID-19 and the logistical changes it has brought have destabilized these efforts, and not all students will be affected equally.

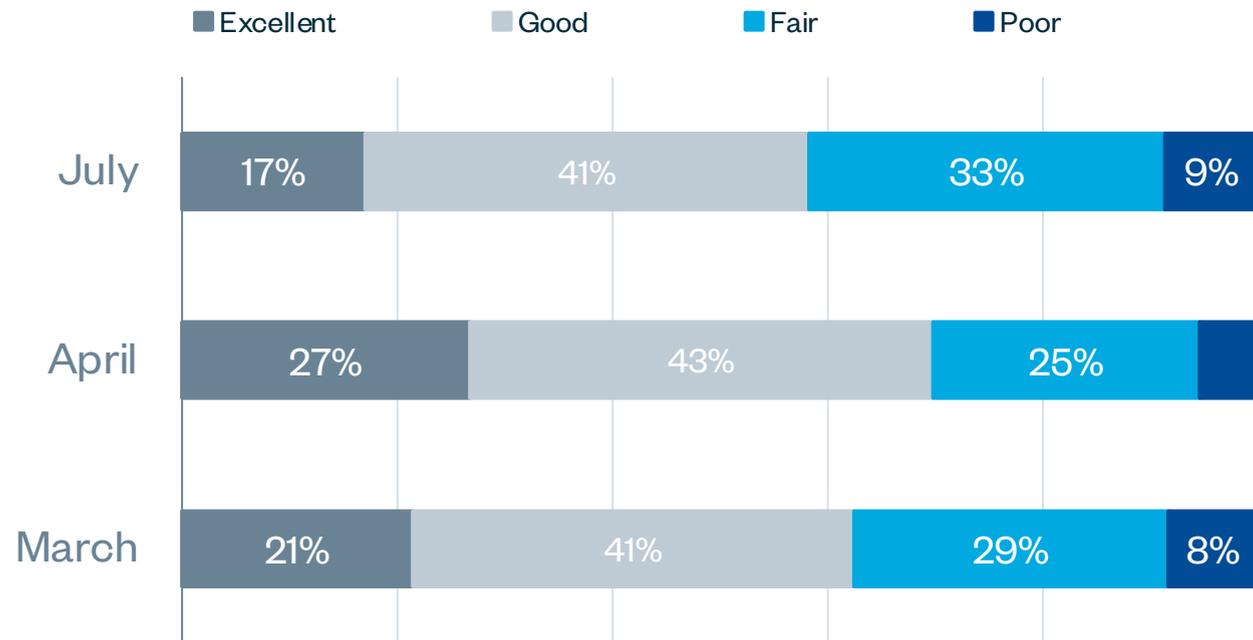
It is clear that COVID-19 is disproportionately affecting students of color, and even though there are efforts to address this issue, little progress has been made towards combatting it. In light of this disparity, and the renewed (and long-overdue) focus on the deep level of systemic racism in our society, it is more important than ever to review your diversity and inclusion initiatives and ensure they are responsive to how COVID is impacting the lives of your students of color. The data indicate that some students of color are more likely to change their mind about their institution or not return to college at all, creating a scenario in which campus diversity could decline as a result of the pandemic. Institutions must work diligently and quickly to ensure their campuses and broader communities are equitable and inclusive.



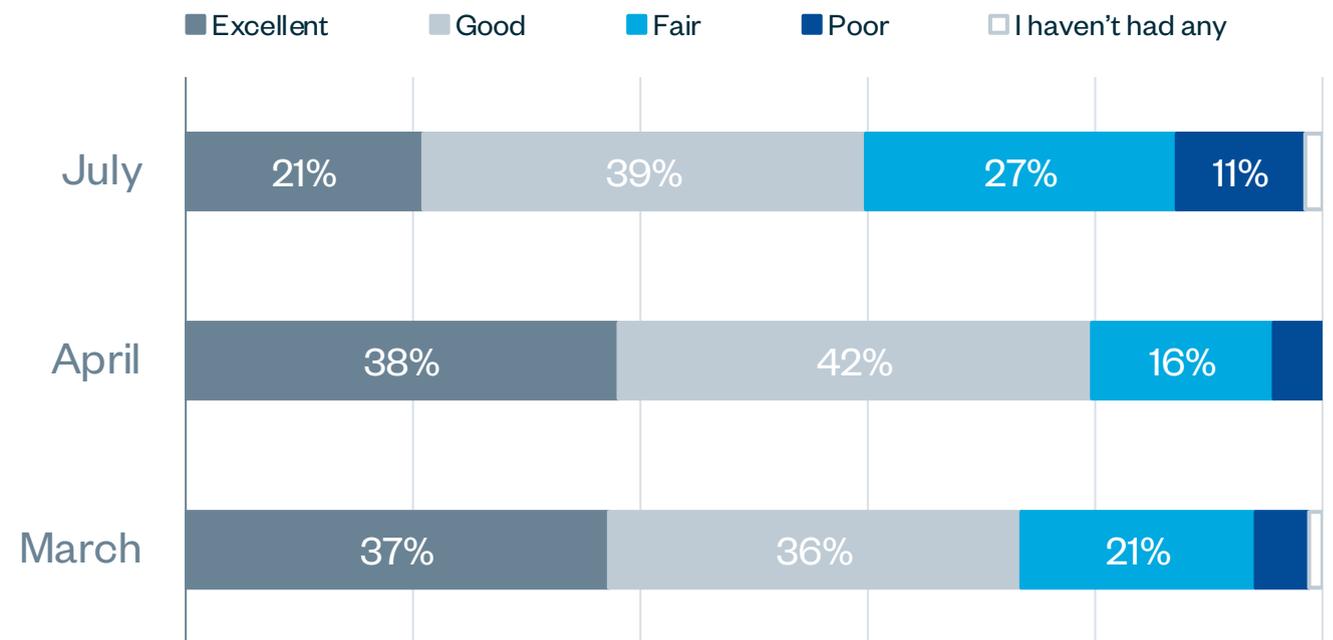
Effective communications
are essential for **brand trust.**

Returning students' perceptions of their institutions' COVID responses and communications have declined since spring.

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

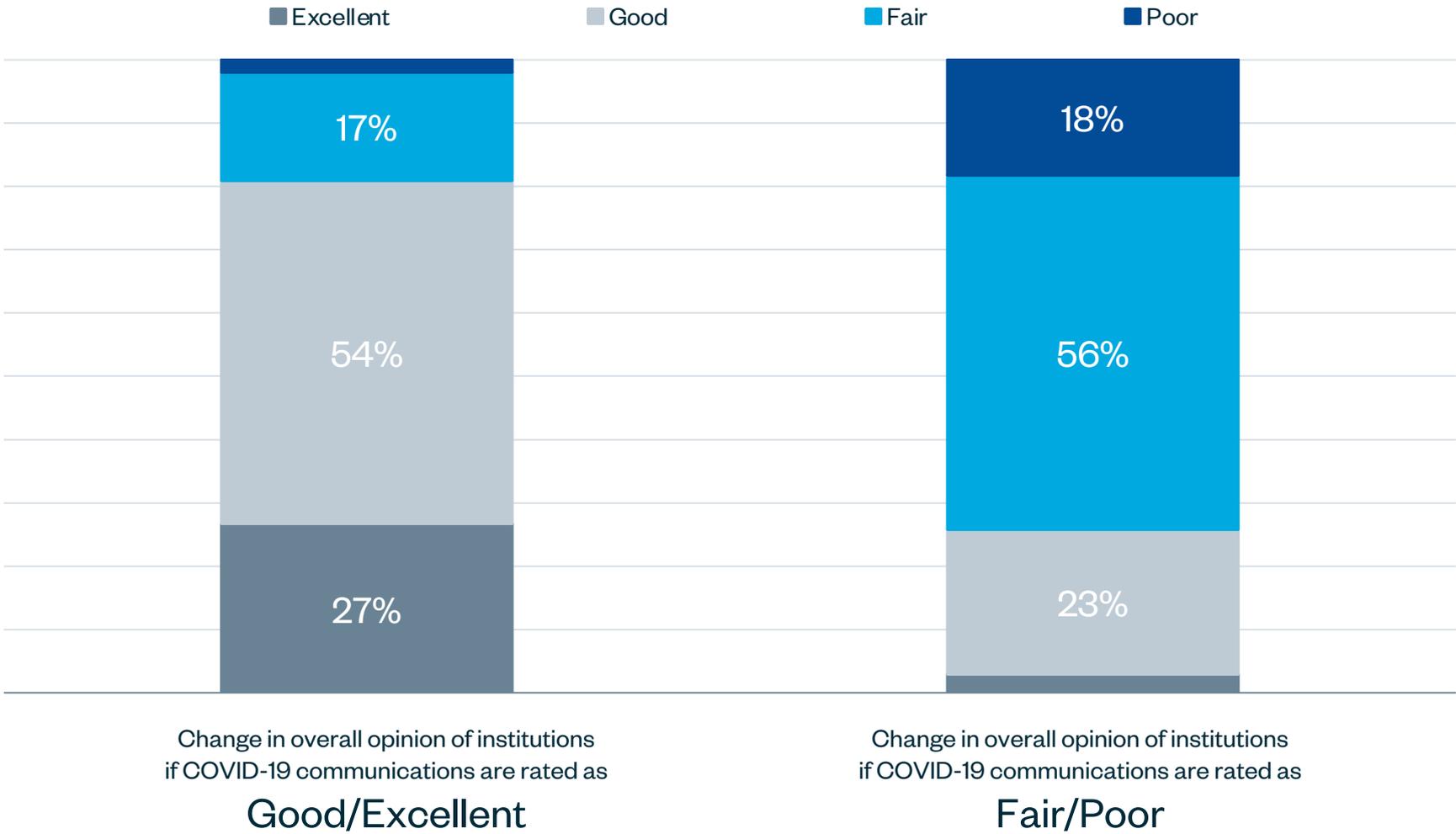


How would you rate your college/university's communication with you about COVID-19?



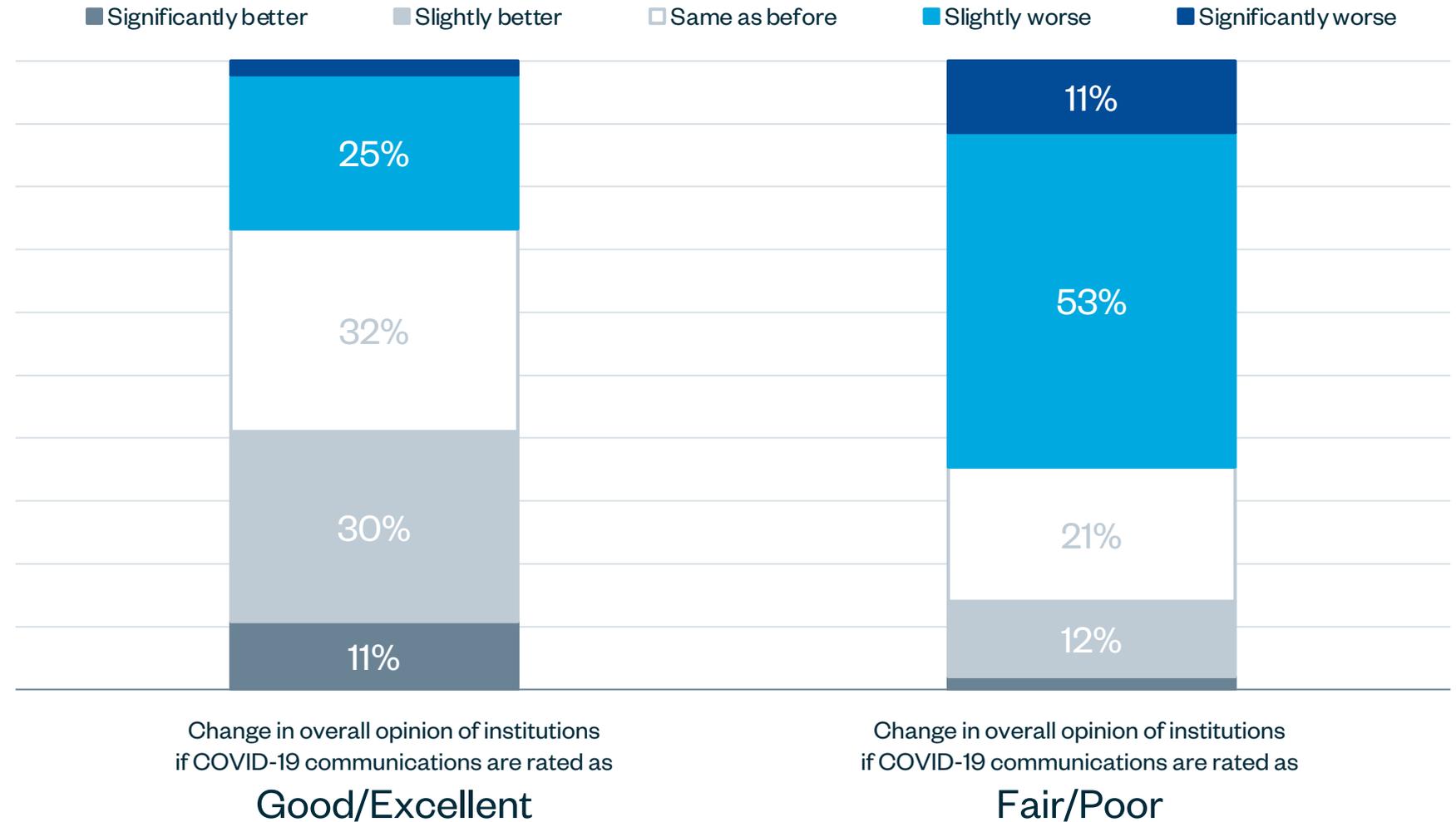
Returning students are more likely to have a positive overall opinion of their institution when COVID communications are rated as good or excellent.

How do you feel your college/university is handling the COVID-19 outbreak?
(by COVID communications rating)



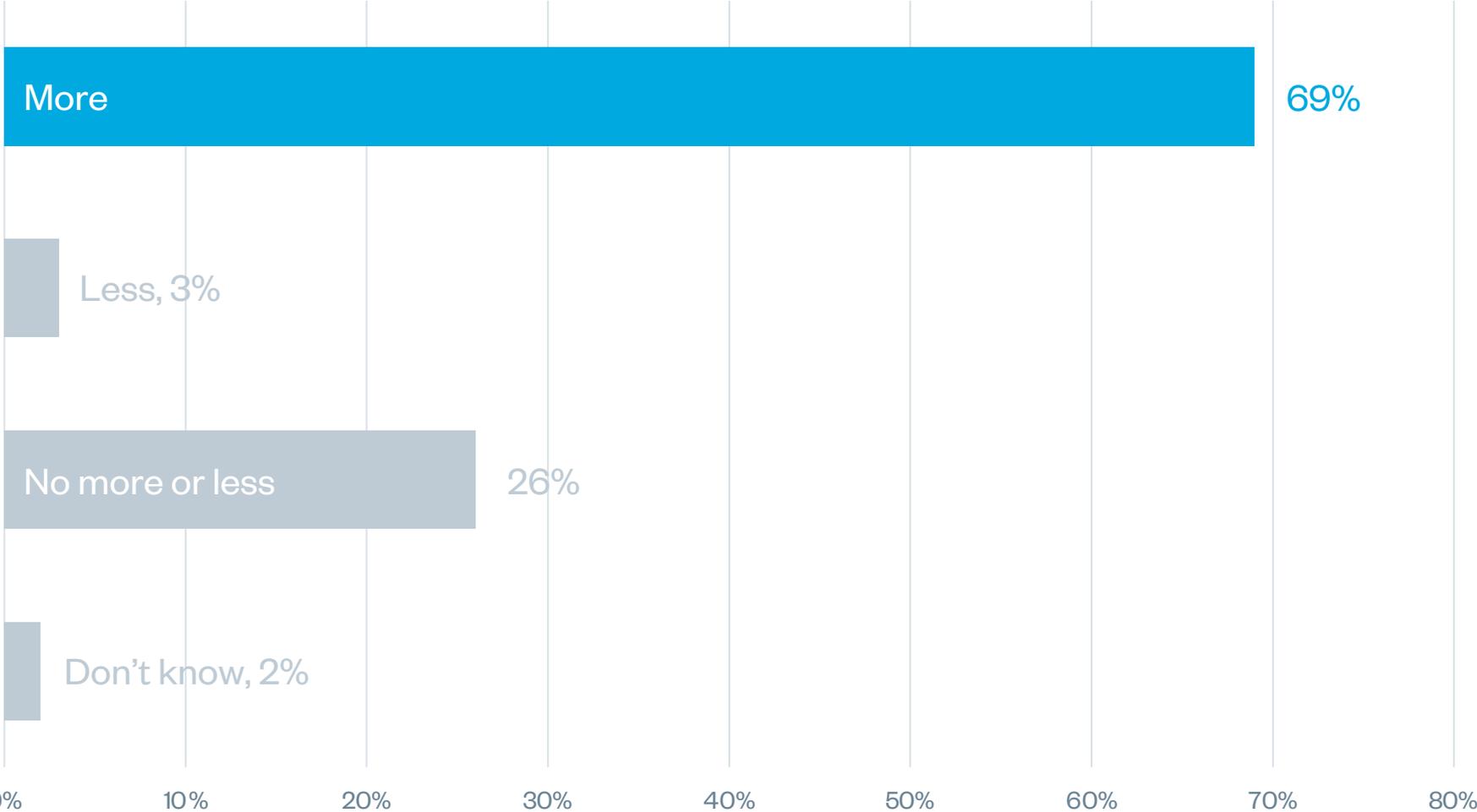
Returning students are more likely to say their overall opinion of their institution is improving when COVID communications are rated as good or excellent.

How has your opinion of your college/university changed since the outbreak of COVID-19 in the US? (by COVID communications rating)



Most returning students want *more* COVID-related communications.

Returning Students: Would you prefer to have more or less communication from your college/university about COVID-19 and fall reopening plans?



Our Recommendation

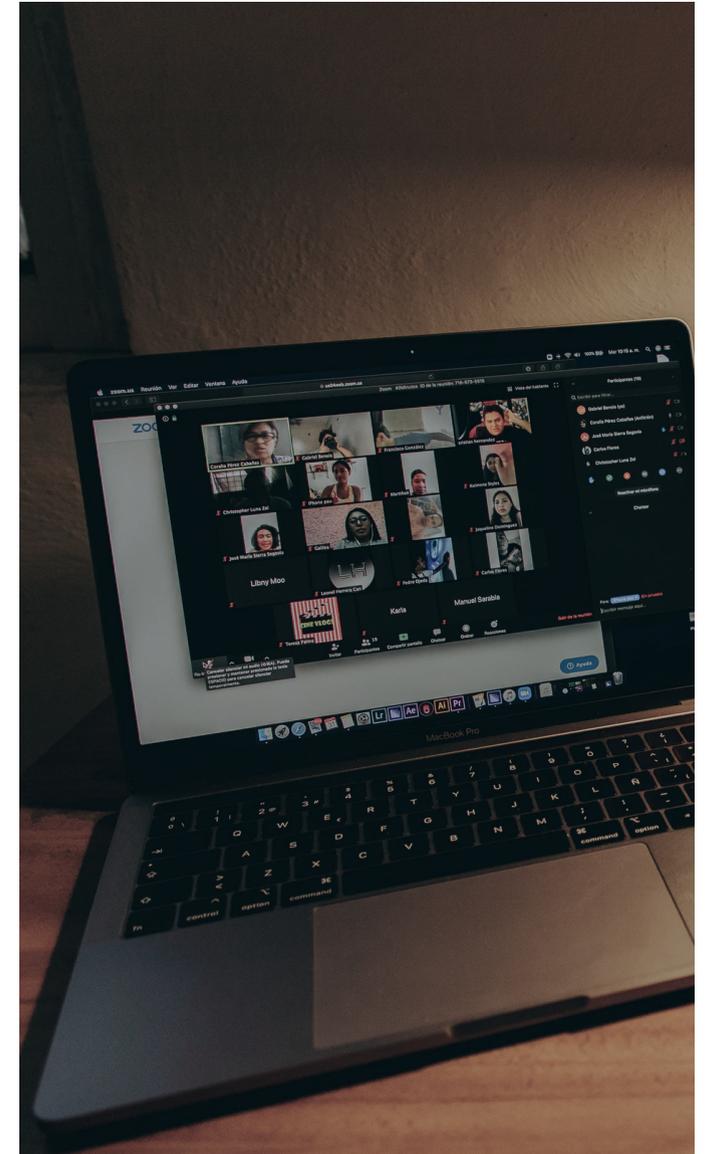
It is exceedingly rare for students to express a desire for more communication from their institutions, but it is equally important to understand how significant an impact effective communication has on brand trust in the long term.

Institutions must measure the effectiveness of their communications. The COVID pandemic has required institutions to create contingency plan after contingency plan, and information is changing constantly. Be wary of implementing a 'more is more' strategy — while students say they want more information, that doesn't mean they want a degree in COVID preparedness and institutional red tape. Instead, consider each audience's needs, and the methods you're employing to disseminate vital information.

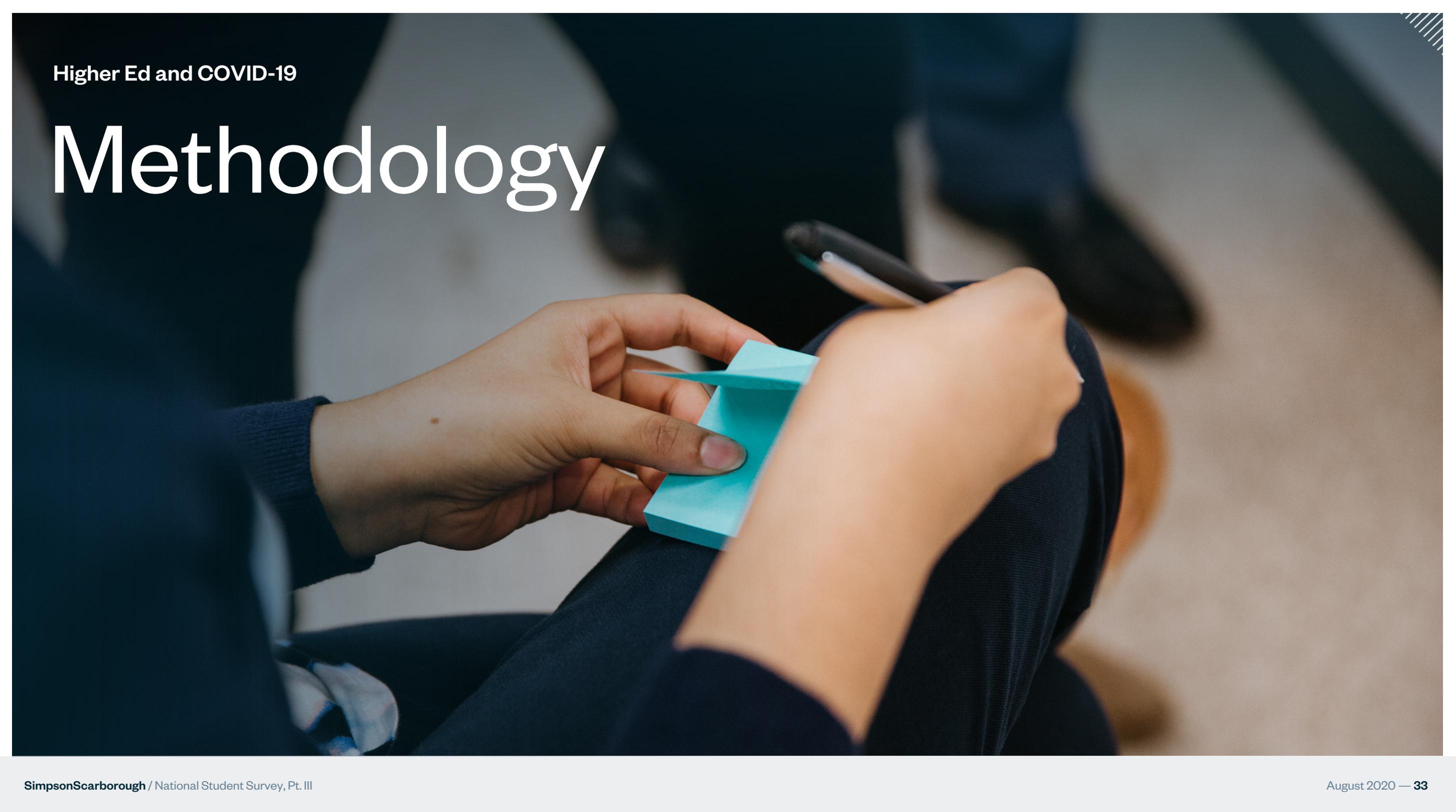
Consider who communications are coming from, and the mediums by which they're being delivered. Email communications are standard, but you should also consider holding town halls for students and their parents, allowing students to opt in to text updates, and using social media.

Of equal importance is that you avoid simply pushing information out, and instead make it easily accessible for ongoing reference. For example, do you have an FAQ on your site, or a searchable database of answers to common questions? If so, are they time-stamped and organized by topic, so students can easily find the answers they're looking for and understand how relevant that information is?

Finally, be sure to make effective communications an institutional priority. These are extremely complex times, but the strong correlation between effective communications and overall student perception of the institution highlights just how important it is to get this right.



Methodology



Methodology Overview

Incoming College Freshmen

**Returning College Sophomores,
Juniors, and Seniors**

	Incoming College Freshmen	Returning College Sophomores, Juniors, and Seniors
Geographic Distribution	National Sample: Controlled for distribution across Northeast, South, Midwest and West	
Margin of Error	+/- 3.14%	+/- 3.18%
Completed Surveys	927	905
Data Collection Period	July 16 th – July 27 th , 2020	
Method of Data Collection	Online Survey	

Sampling Frame —

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



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

Profile of Respondents — Incoming Freshmen 927 Respondents

Gender Identity

Male	36%
Female	63%
I do not identify with either of these options	1%
Prefer not to answer	1%

Race/Ethnicity

American Indian/Native Alaskan	3%
Asian	17%
Black or African American	14%
Hawaiian/Pacific Islander	1%
White	64%
Other	4%
Prefer not to answer	2%

Are you of Hispanic or Latino/a origin?

Yes	23%
No	77%

First Generation College Student

Yes	19%
No	79%
Don't Know	2%

Intended College Type

In-state public college/university	50%
In-state private college/university	31%
Out-of-state public college/university	10%
Out-of-state private college/university	9%

High School Type

Private	29%
Public	69%
Other	2%

Home Region

Midwest	19%
Northeast	27%
South	27%
West	27%

Political Affiliation

Republican	12%
Democrat	34%
Independent	42%
None of the above	12%

Profile of Respondents — Returning College Students 905 Respondents

Gender Identity

Male	25%
Female	73%
I do not identify with either of these options	1%
Prefer not to answer	0%

Race/Ethnicity

American Indian/Native Alaskan	2%
Asian	19%
Black or African American	14%
Hawaiian/Pacific Islander	1%
White	61%
Other	4%
Prefer not to answer	4%

Are you of Hispanic or Latino/a origin?

Yes	18%
No	82%

First Generation College Student

Yes	23%
No	75%
Don't Know	2%

Year in School

College/university sophomore	38%
College/university junior	36%
College/university senior	26%

School Region

Midwest	22%
Northeast	26%
South	29%
West	23%

College Type

In-state public college/university	56%
In-state private college/university	21%
Out-of-state public college/university	9%
Out-of-state private college/university	13%

Home Region

Midwest	22%
Northeast	27%
South	28%
West	23%

Political Affiliation

Republican	14%
Democrat	48%
Independent	25%
None of the above	12%

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.



SimpsonScarborough is a woman-owned firm.

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