EAB

Blueprint for Growth

Enrolling and Serving the Students of the Pandemic

Virtual Roundtable for Enrollment and Student Affairs Leaders

Joining Us Today…

Meet Your EAB Presenters

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Zoom Features

Red slashes mean your microphone is muted and your camera is off

Access audio and video options by clicking the up arrow next to the Mic and Camera icon

Open Participants and Chat

1. Understanding the Losses Defining the Student Pandemic Experience
2. From Return on Investment to Return on Experience

   Breakout discussion
3. Digital Connoisseurs
4. Disillusionment

   Breakout discussion

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Students of the Pandemic: What Colleges See

Seeing Into Students' Lives Has Broadened Our Perspective

Received a loaner laptop

Had internship cancelled

Rarely turns video on

Misses class because of illness

Cares for younger siblings

Had senior season disrupted

Struggles with internet outages

Never attends synchronously

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Seeing More Allows Us to Do More

Increased Empathy, Urgency Has Produced Important Gains

Recei
loaner

urns
on

> "This is the **first time in 25 years that the university has changed from the traditional calendar**, and that's a milestone. If they're willing to change the calendar, then maybe they'll be willing to make transformation in other ways that serve students."
>
> **Assistant Vice President**
>
> *Public University*

Had senior season disrupted

Struggles with internet outages

Never attends synchronously

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Overheard on /r/College, Feb. 2021

What We Can't See Through a Screen

> I have **lost all will to go to school**.

> I'm sick of feeling like I'm wasting my time, **waking up exhausted before the day even begins**, and feeling hollow every time I stare at the Canvas homepage.

> I feel completely lost and can't focus in class. I **sit down for two minutes and then lose focus** almost immediately.

Today's Focus

Three Losses Defining the Pandemic Student Experience

Loss of Experience

Campus closures, event cancellations, and shift to largely remote instruction deprived many students of the typical college experience

Loss of Quality

The abrupt move to remote instruction, compounded by faculty and student inexperience with online modality resulted in diminished educational quality

Loss of Trust

Inconsistent communication and opaque decision-making contributed to declining trust in the mission of higher education

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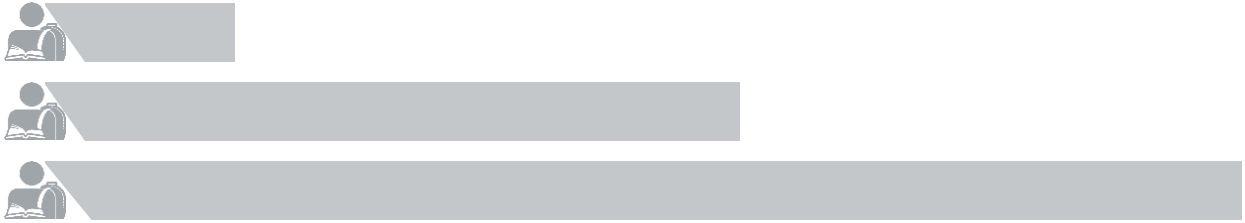
Not All Losses Are Experienced Equally

Pandemic Experience Varies Widely Across Students, Segments



Global Mental Health Crisis	Rapidly Spreading Virus	Economic Recession	Growing Basic Needs Insecurity	Unequal Access, Outcomes
80%	22.5%	75%	58%	-14.9%
Of college students said the pandemic **negatively affected their mental health**	Of confirmed COVID-19 cases in the U.S. were in adults aged 18-29[4]	Of college students struggle with having **enough resources to pay for school**	Of college students reported experiencing basic needs insecurity[1] during the pandemic	Year-over-year change in **FAFSA submissions** from high-minority[2] high schools[3]

1) Defined as homelessness, food insecurity, and/or housing insecurity
2) Defined as >39% Black and Hispanic students
3) As of Feb. 2021
4) As of Feb. 2021 (~4.5M cases)

Sources: "COVID-19 Impact on College Students Mental Health," Active Minds, April 2020; "Demographic Trends of COVID-19 Cases and Deaths in the US reported to the CDC," Centers for Disease Control, February 2021; "#RealCollege During the Pandemic: New Evidence on; Basic Needs Insecurity and Student Well-Being," HOPE Center, June 2020; "Higher Ed Tracking Survey," New America/Third Way, December 2020

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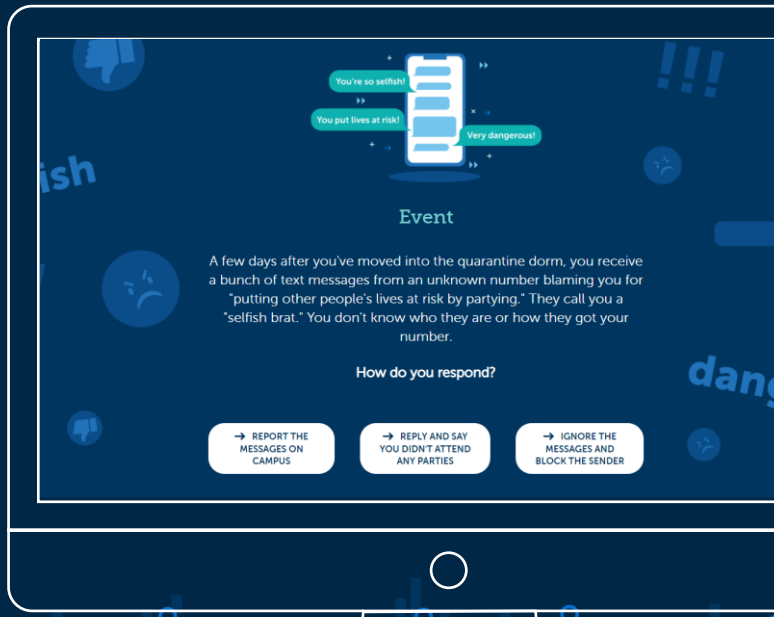
Coming Soon!
Can You Navigate a Pandemic Semester?

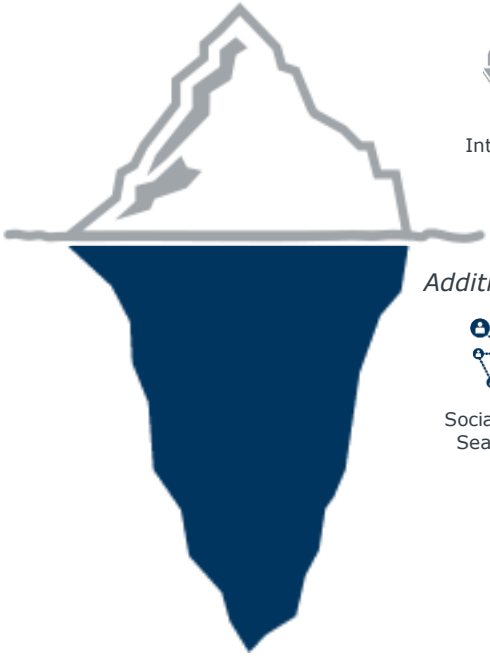
New **interactive infographic** allows partners to experience a semester through the eyes—and decisions—of three student personas:

- First-generation high school senior
- Current four-year student
- Prospective adult student



Looking Beneath the Surface

Identifying What's "Unseen" Requires A Different Type of Investigation



Traditional Research Scope:

- Research Interviews with Higher Ed Partners
- Public Student Survey Data
- Higher Ed and Academic Literature

Additional Sources We Consulted:

- Social Media and Search Engine Data
- 130+ College Student Newspaper Articles
- Student-Led Webinars and Virtual Events
- Global Pandemic Consumer Trends
- Behavioral Science Insights

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From Experience to Expectation

Pandemic Losses Shape Current and Future Student Consumer Behaviors

Loss of Experience

From Return on Investment to Return on Experience

Financial and experience scarcity leads students to prioritize short-term, transactional experiences over long-term investment gains when determining value

Loss of Quality

Digital Connoisseurs

Student expectations of virtual environments set by hyper-digital non-academic world have been unfulfilled by remote instruction, resulting in significant backlash but not likely to eliminate future demand

Loss of Trust

Disillusionment

Growing belief that higher ed has broken its social contract with students, by prioritizing "profits over people," produces disengagement and activism

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From Return on Investment to Return on Experience

Pandemic Creates Scarcity Mindset

Loss of Experiences, Resources Shifting Focus to "Here and Now"

Resource Scarcity Shown to Limit Long-Term Planning

Some Consequences of Having Too Little (2012, Science)

Resource scarcity shifts focus:

From Long-Term Goals → **To Immediate Concerns**

Experiment outcomes for resource-poor participants:

- Spend more mental energy on immediate tasks
- Were more likely to borrow against future tasks to complete current one

And Pandemic-Era Students Face Scarcity on all Fronts

Percent of US Households (Jan. 20th):

35% — **Face Financial Pressure**
Have difficulty paying for usual household expenses

25% — **Expect a Loss of Income**
Expect to lose employment income over the next month

11% — **Go Hungry**
Sometimes or often didn't have enough food during the past week

Sources: New America/Third Way; Pew Research; Chronicle of Higher Education; Shah, Mullainanthan, and Shafir, 'Some Consequences of Having Too Little' *Science* (2012); US Census Bureau Household Pulse Survey, 'Week 23'; EAB interviews and analysis.

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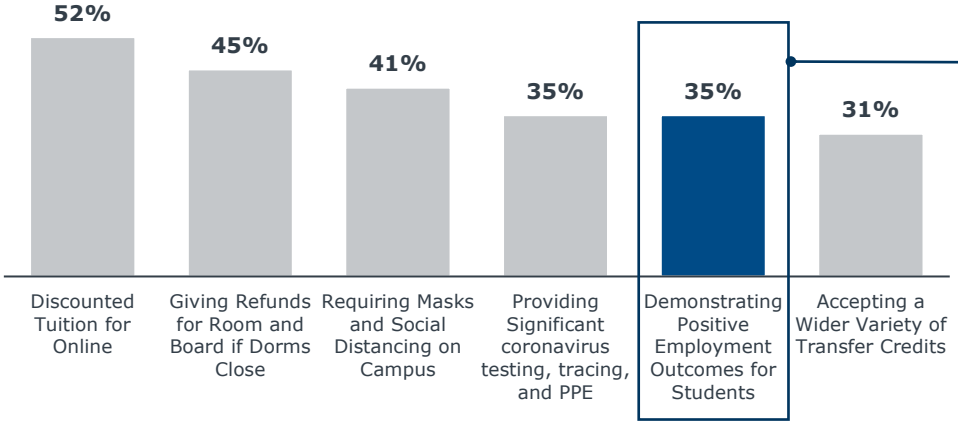
More Like a Customer Than an Investor

Short-Term Focus Leads Students to Prioritize "What Am I Getting Now?"

Proportion of students who say that institutional actions would make it "very likely" they'd reenroll, n = 1,008



83.5%

Of 2019 freshman said that **improved job prospects were "very important"** in deciding to go to college

Student Taking [Customer] Experience into Their Own Hands

"Tuition refunds" has trended on petition site Change.org since April 2020

Increase in student proposals to revise academic policies, remote services, and instruction since pandemic

Source: New America and Third Way; The American Freshman: National Norms Fall 2019; www.change.org;

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Loss of Experience Will Drive Future Behaviors

Scarcity Not Likely to Last, But Certain Behaviors Will

Case-in-Brief: 1970s Energy Crisis

- Conflicts in the Middle East created disruption in oil exports
- U.S. faced petroleum shortages and increased prices
- **Gas prices skyrocketed**, the American **automotive industry suffered significant losses**, and national economic growth stalled for much of the decade

Decades Later, Scarcity Behaviors Adopted During Formative Years Persist

Individuals who were 15- to 18-years-old[1] during the "oil shocks"

Less likely to have household vehicle access

Less likely to drive to work

More likely to commute via public transit

25+ Years Later

compared to other age cohorts[2]

Higher Ed Insight

- Focus on short-term return will outlast pandemic
- Future students are especially vulnerable

1) The age at which most Americans acquired a driver's license
2) Controlling for income, recessions, and delayed skill acquisition

Source: The History Channel, National Bureau of Economic Research, EAB interviews and analysis.

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R.O.E. in 2021: Return on Experience

Growing "Customer-ization" Evident in Student Behavior

Three Emerging Trends that Capture ROE Mindset

1 College, A La Carte

Students seek to construct an experience that meets their needs, rather than treating the college experience as a package deal

On-campus students seek exemptions from in-person classes, without "compelling reasons"

2 Everything is Negotiable

Tuition charges, fees, and financial aid offers are increasingly viewed as negotiable

Twice as many posts on /r/ApplyingtoCollege subreddit about financial aid negotiation during 2021 cycle than 2020

3 I'd Like to Speak to the Manager

Dissatisfaction with current policies or practices is targeted directly at senior leaders

Students demonstrate dissatisfaction with campus policies outside of college presidents' homes

Sources: Reddit.com, The Gainsville Sun, Block Club Chicago, EAB interviews and analysis

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How to Demonstrate Return on Experience

1 College, A La Carte

Students seek to construct an experience that meets their needs, rather than treating the college experience as a package deal

On-campus students seek exemptions from in-person classes, without "compelling reasons"

Avoid the "paradox of choice" by offering a limited set of service options (e.g., in-person or virtual advising) that provide flexibility and structure

2 Everything is Negotiable

Tuition charges, fees, and financial aid offers are increasingly viewed as negotiable

Twice as many posts on /r/ApplyingtoCollege subreddit about financial aid negotiation during 2021 cycle than 2020

"Pull back the curtain" in pricing and aid communications to explicitly outline the immediate return on tuition investments

3 I'd Like to Speak to the Manager

Dissatisfaction with current policies or practices is targeted directly at senior leaders

Students demonstrate dissatisfaction with campus policies outside of college presidents' homes

Bring students to the decision-making table to solicit their input and leverage their influence as ambassadors of institutional decisions

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Breakout Discussions

What new ways are students expressing [dis]satisfaction with their current college experience?

How has your institution responded?

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Digital Connoisseurs

Pre-Pandemic, Digital Expectations Already High

Gen Z Born Into Accessible, Participatory, and Directive Internet Era

Their Daily Lives Shaped by an Advanced Digital Landscape

- **One-stop-shop information access**, whenever and wherever
- Information **filtered through algorithms**
- **Online experience personalized** through ad tracking
- **Media has always been social,** and platforms have distinct purposes
- Content has **8-seconds to capture attention**

Feeling the Effects

Campus Impacts of the Digital Ecosystem

- Students want more **directive and personalized** ways to navigate campus resources
- Students increasingly **expect 24/7 service** and **centralized information hubs**
- Growing need for students to undergo **online conduct and media literacy training**
- Online polarization is **intensifying conduct issues** and **magnifying visibility and range of flashpoints**

Source: The Center for Generational Kinetics, 2018, *The State of Gen Z 2018*; Seemiller, C., Grace, M., 2016, Generation Z Goes to College; EAB interviews and analysis.

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…But Higher Ed Fails to Meet Expectations

> Twice a day, two times a week when I sit down for my live online classes, I **want to chuck my laptop into a fire** and never open a WebEx video conference again. The amount of technical problems and quality of education is just not worth it this semester....I understand professors and staff are trying their best to figure out online solutions in a short amount of time. I appreciate their fortitude in even teaching online when the process is so new. But we have to admit the **quality of education offered before is not there anymore.**
>
> *Nienke*
> *College Student*

Source: Mesa Community College Legend, "It's Official: Online Learning is Terrible," September 2020

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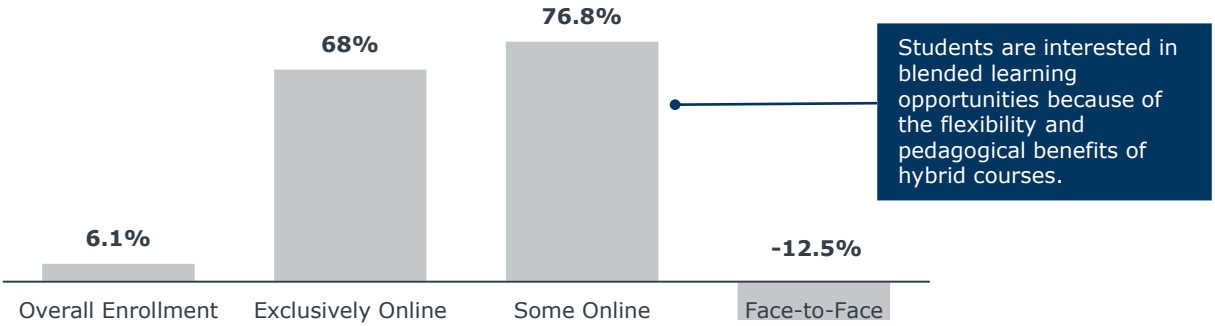
Has Pandemic Experience Killed Online Learning?

Enrollment in Online and Hybrid Courses and Programs Continues to Grow…

Percentage change in student enrollment at four-year, degree-granting institutions, 2012-2019



…But Questions Abound About Long-Term Effects on Interest in Online Ed

"Will Shift to Remote Teaching Be Boon or Bane for Online Learning?"

INSIDE HIGHER ED

"Forced Off Campus by Coronavirus, Students Aren't Won Over by Online Education"

PBS NEWS HOUR

"Online Learning is Not the Future"

INSIDE HIGHER ED

Source: From news organization websites, full list available upon request; Zalaznick, Matt, "What do Students Think of Online Learning? 2 Surveys Shed Some Light," *University Business,* June 2020.; EAB analysis of IPEDS data.

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Online Is Not [Necessarily] The Issue

Students Flocking to Quality Virtual Learning, but Not From Your Institution

Students Turned Toward Digital Educational Content

Views on #LearnonTikTok in 2020; introduction of instructional tools (via Quizlet)

More 18-to-24-year-olds listened to a podcast for the first time on Spotify in 2020; Education the 5th most popular genre

Across a two-year period, the search term "learn how" peaked during the pandemic[1] on YouTube

The Student Voice

Poor Quality, Not Virtual Medium, Drives Student Discontent

Analysis Methodology:

130+ Student newspapers from around the country

84%

Of articles referenced **negative student feelings** toward the online learning experience during the pandemic

2x

Students were two times more likely to reference **poor quality of online instruction** as a negative, **rather than the online medium** itself

1) Peaks seen between March 25-21 and March 29 – April 4, 2020.

Source: "Digital Learning Tools Arrive on TikTok, *TikTok,* Jan 2021; "The Trends that Shaped Steaming in 2020," *Spotify,* December 2020; Google Trends; EAB interviews and analysis.

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Even Amid Poor Virtual Experiences, Students Expect Quality Future Online Instruction

In a survey of college students in Spring 2020

68%

Said they want their courses to include some degree of online learning post-COVID

And two-thirds of students cited added flexibility as a benefit of online instruction

Source: "Not Going Back: How the Class of COVID has embraced online education," Chegg.org, July 2020; EAB interviews and analysis.

Post-Pandemic, Focus on Known Wins

Strategically Scale and Sunset Virtual Services Based on Student Needs

Spectrum of Pandemic-induced Virtual Initiatives

Sunset	Case-by-Case	Lock-in and Expand
Student technology distribution	Remote work flexibility	**Quality Digital Instruction** Expand Center for Teaching and Learning resources and increase their role in online instruction
All-virtual Greek life	Online campus events	**Virtual Support Services** Scale up virtual advising and other services to allow flexible, equitable, and just-in-time access to holistic, student-centered support

Criteria for Expansion:

- **Increases Access**
- **Sustainable**
- **Reduces "Friction"**

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Non-Negotiable Principles of Student Experience

Putting Something Online Doesn't Mean It's Accessible

User Experience Research Helps Institutions Ask the Right Questions

Modality

- ❑ Will making this service virtual add or reduce user time?

Access

- ❑ Do students have the technological capabilities to access this service?

Context

- ❑ Does a student's real-world environment make accessing this service feasible?
- ❑ Does a student's real-world environment create friction with the virtual service?

Ease-of-Use

- ❑ Is there student demand for the service?
- ❑ Can students easily navigate the service?
- ❑ Has each element been included for a purpose?

Case in Brief

Virtual Mental Health in Residence Halls Doesn't (Always) Work

Problem: The pandemic has caused an **increase in student mental health concerns**

"Solution": College offered **virtual counseling** appointments

UX Problem: Students had **no privacy in residence halls** to take counseling appointments

UX Solution: Counseling center opened an office to **serve as a virtual appointment room** and developed **sanitation protocols**

Source: 4 Questions to Improve eLearning User Experience for Better Engagement.; EAB interviews and analysis.

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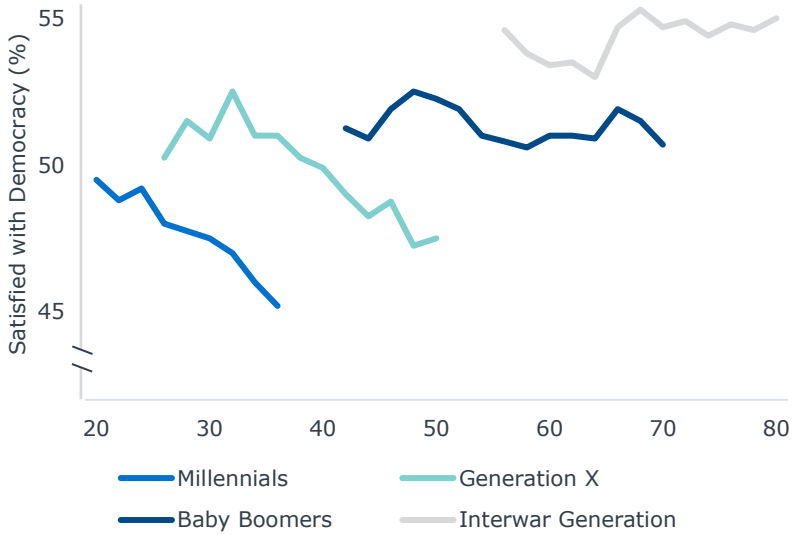
Disillusionment

Worldwide, Faith in Democracy Plummets

Even Pre-Pandemic, Young Adults Indicate Loss of Trust in Democracy

Percent of Respondents Satisfied with Democracy in a Selection of 75 Countries by Age, Broken Down by Generational Cohort



Troubling Signs for the Younger Generation

73%

Of Gen Z voters believe our democracy is broken

10%

In a survey of Gen Z, 10% of respondents said the U.S. government is trustworthy

During the pandemic, Gen Z trust in almost every major U.S. institution has decreased[1]

1) Includes institutions such as federal, state and local governments, the police, the media, Hollywood, big businesses and companies, the public education system, and more.

Source: Foa, R.S., et al., "Youth and Satisfaction with Democracy," *University of Cambridge,* Oct. 2020.; Dowd, Trone, "Young People Think Politic is Broken But They're Voting in Huge Numbers Anyway," *Vice,* Oct. 2020.; Sakal, Victoria, "Why Gen Isn't Interested in your Statements, Promises, and Commitments–Yet," *Morning Consult,* June 2020.; EAB interviews and analysis.

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Pandemic Conditions Ripe for Disillusionment

Income Inequality and Youth Unemployment Tied to Loss of Faith

Income Inequality Negatively Correlated with Faith in Democracy

Multiple studies show that as wealth inequality increases, satisfaction with democracy decreases

30%

One study showed that wealth inequality alone accounted for over 30% of the variance in democratic support between nations

Excess Youth Unemployment Associated with Loss of Faith

50+%

When the disparity between youth unemployment and overall unemployment was low, youth satisfaction with democracy remained high[1] (above 50% satisfied)

30%

However, when youth unemployment rates were 25 percentage points higher than the average, youth satisfaction with democracy plummeted to 30%[1]

8x

At the height of the pandemic, **low-wage jobs were lost at about eight times the rate of high-wage jobs**

12.5%

Youth unemployment was 12.5% in December 2020 vs. **6.7% for the general U.S. population**

1) Among the five nations hit hardest by the Eurozone crisis: Portugal, Italy, Ireland, Greece, and Spain

Source: Kreickhaus, Jonathan et al., "Economic Inequality and Democratic Support," *The Journal of Politics,* Nov. 2013.; Foa, R.S., et al., "Youth and Satisfaction with Democracy," *University of Cambridge,* Oct. 2020.; Melo, Frederick "Young People Campaign for MN Unemployment Benefits," *Twin Cities Pioneer Press,* February 2020.; "The COVID-19 Recession is the Most Unequal in Modern U.S. History," *The Washington Post,* September 2020.; EAB interviews and analysis.

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Two Outcomes of Disillusionment

Loss of Faith in Systems Predicts Disengagement and Activism

Disengagement ← **Disillusionment** → **Activism**

Disillusioned Citizens Pull Away from Civic Life…

24th

Out of 35 members of the Organization for Economic Cooperation and Development, the U.S. ranks 24th in electoral participation.

38%

Of non-voters are not confident that elections represent the will of the people

12.9M

Eligible British voters did not vote in the Brexit referendum

… Or Are Motivated Toward Activism and Polarization

Those who voted to "remain" in the EU expressed **more polarized political views and higher disillusionment** after the Brexit referendum results were announced compared to those who voted "leave"

In a controlled study, disillusionment **increased political activism** intentions among both liberals and conservatives

Source: DeSilver, Drew, "Turnout Soared in 2020 as Nearly Two-Thirds of Eligible U.S. Voters Cast Ballots for President." *Pew Research Center,* January 2021.; "The Untold Story of American Non-Voters," *The Knight Foundation,* February 2020.; Dunon-Wasowicz, Roch, "Brexit is Not the Will of the British People – It Never Has Been," *LSE,* October 2016.; Maher, Paul and Eric Igou, "Brexit, Trump, and the Polarizing Effect of Disillusionment," *Social Psychological and Personality Science.*

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Higher Ed Feeling the Pain

"Betrayed"

"Disconnected from Reality"

"Cheated"

"What's the point?"

"The amount of money I'm paying is not worth the quality of the education"

> **This generation sees** big box stores, the government, capitalism, and even **[college] administrations as the enemy—not for the people that they serve**. I think this is a lost cause. I don't see college students as on the same side as administrators, generally.
>
> **Associate Vice Provost**
> *Private Research University*

"It can never be the same as the traditional college setting"

"Scammed"

"Value is not the same"

"Still they charge $28k for the semester"

"Too much homework"

"I don't feel that engaged"

"Not learning a thing"

"Classes don't translate well to online"

"Look at a screen all day, 11+ hours"

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Source: EAB interviews and analysis.

Disillusionment Comes to Campus

Students Accuse Higher Ed of Putting Profits Over People

Theory of the Case

Already Held to a Higher Standard…

Moral Disillusionment Hypothesis:

Non-profits held to higher ethical standards than for-profits
(*Hornsey et al., 2020)*

"[Colleges] **failed in their missions** and showed students that **they value our money a lot more** than actually improving our educational experiences while keeping us safe."

University Student

… And Disillusionment Among Gen Z Getting Worse by the Day

21% → 14%

April → June

14% of Gen Z survey respondents **indicated trust in the U.S. public education** system in June 2020 vs. 21% in April

69%

Of college students agreed that "**higher ed** institutions are **looking out for their bottom lines** rather than the health of their students" (67% of high school seniors said the same)

Year of Institutional Failure

"2020 has made it obvious that modern life is deeply flawed and that hard work in the future is needed to fix these flaws. Considering this, **students have earned a right to exhaustion and disillusionment**."

Colorado Sate University Student Newspaper

Source: "Cooke: Students have Earned the Right to be Exhausted," *The Rocky Mountain Collegian,* January 2021; EAB interviews and analysis.

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Two Outcomes of Disillusionment: Campus Edition

Alarming Rise in Issues of Academic Integrity…

225% Increase in academic integrity cases in Fall vs. Spring 2020 at one public flagship university

…And Other Forms of Disengagement

One institution typically sees 16-18 candidates for six first-year SGA positions; this year, they could only fill four seats

A+ Some are concerned that student success metrics may be inflated by pandemic accommodations, masking severe issues

Student Backlash Taking Increasingly Public Forms…

#3 "University Response to COVID-19" the third leading driver of student activism from 2015-2020

6 Higher ed-related topics trended six times on change.org in 2020 (vs. no higher ed topics in 2019)

…And Students are Going Straight to the Top

College administrators reports that students are bringing concerns right to cabinet-level leaders

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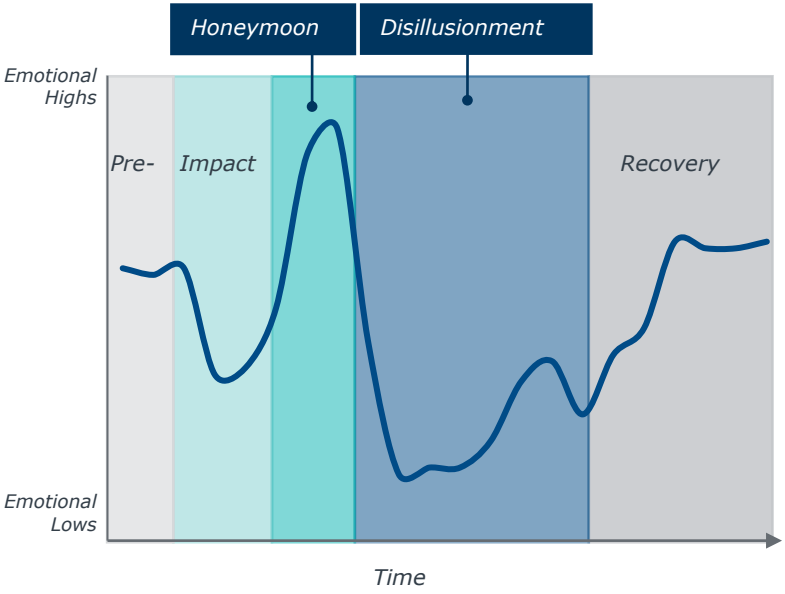
Source: EAB interviews and analysis.

What Comes Next?

Disaster Response Theory Provides Important Lessons for Higher Ed

Phases of Disaster Have Distinct Emotional Consequences

U.S. Department of Health and Human Services



Honeymoon

- Immediate threat is removed
- Community bonding occurs
- Optimism that normalcy is imminent
- Typically **lasts a few weeks**

Disillusionment

- Limitations of disaster assistance is realized
- Optimism turns to discouragement and return of chronic stress
- Gap between need and assistance leads to feelings of abandonment
- Can **last months or years**

Source: Substance Abuse and Mental Health Services Administration

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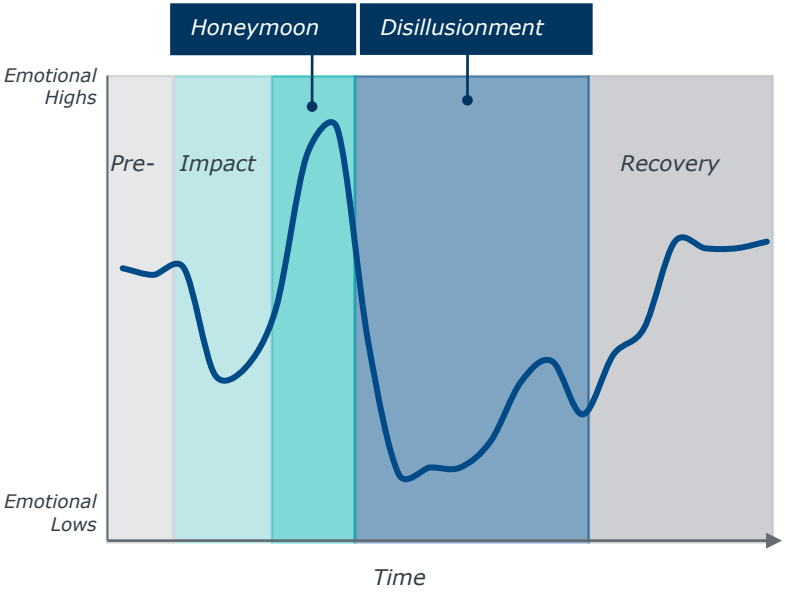
Not Just a Pandemic Phenomenon

Post-Pandemic Disillusionment Likely to Influence Enrollment, Engagement

Phases of Disaster Have Distinct Emotional Consequences

U.S. Department of Health and Human Services



Signs of Post-Pandemic Disillusionment

- Physical and emotional exhaustion
- Dramatic shift in demand for services
- Lower academic engagement, performance
- Expressions of abandonment and resentment

Source: Substance Abuse and Mental Health Services Administration

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Set Your Sights on Well-Being and Making Meaning

Beyond Enrollment, Focus on Quality Student Experiences

1

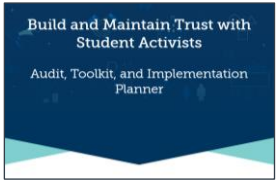
Extend Pandemic-Response Policies, Especially Those Around Student Support

2

Support Student Well-Being and Invest in Meaningful Experiences

Providing Virtual Support to Students and Staff During Crisis Webconference

Recommendations for helping you, your students, and your staff feel more connected



Student Activism Resources

- Assess your current practices
- Explore recommendations and resources
- Create an implementation plan

Mental Health Resource Center

- Meeting the Escalating Demand for Mental Health Services (with Implementation Guide)
- Establishing a Sustainable Scope of Service
- *And many more!*

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Breakout Discussions
Enrollment Leaders

How are you seeing disillusionment in prospective student behaviors, attitudes, and communications?

What challenges has that raised for you and your team?

Breakout Discussions
Student Affairs Leaders

How has disillusionment manifested—in terms of disengagement and/or activism—in current students at your institution?

What concerns do you have about being able to meet their needs?

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Loss of Quality

Digital Connoisseurs

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Loss of Trust

Disillusionment

Growing belief that higher ed has broken its social contract with students, by prioritizing "profits over people," produces disengagement and activism

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Final Thoughts

Please take a moment to answer this final poll question to provide your overall experience on today's session.

We have also shared a link to a short online evaluation in the **Chat** and we would appreciate if you could take 2-3 minutes to give us additional feedback on your experience today.

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