

Populace Insights: American Priorities For Higher Education

Abstract

What it is:

A national private opinion quantitative survey that surfaces the decision-making factors that matter most for Americans in choosing a higher education experience. It was conducted by the think tank Populace and powered by Gradient Metrics.

How it was conducted:

The primary component was a choice-based-conjoint (CBC) instrument that distinguishes between personal opinion and perceived societal opinion (what respondents assume most others believe). Rather than directly asking respondents what priorities they hold for their own higher education experience, this survey's CBC simulated real-world decision-making by forcing respondents to make tradeoffs. This not only reduces the ceiling effect where respondents can claim everything is important or unimportant, but also minimizes social desirability effects.

When it ran: May 28 - June 9, 2020.

About Populace:

Populace is a Massachusetts-based think tank dedicated to building a world where all people have the chance to live fulfilling lives in a thriving society. Populace's research products offer new insights into what Americans actually believe with polling methodologies that reduce social pressure and bias from traditional public opinion collection. For more information, visit Populace.org.

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Executive Summary

Like so many other industries, Covid-19 has pushed America's higher education market into uncharted waters. Uncertainty over enrollment projections, operating budgets, even daily campus life are driving higher education institutions to reexamine how they do business. Not necessarily because they want to. Rather, because for many, financial solvency — even survival — depends on it.

Conducted by the think tank Populace, this national private opinion quantitative survey directs attention to demonstrated priorities of the country at large and consumers specifically (students and their families) when it comes to higher education. Together, the results offer meaningful, measurable, and actionable insights for shaping higher education's next chapter.

Key Findings

1 The overarching commonality:

American higher education priorities are *deeply practical*.

Americans prioritize financing considerations, job prospects, applied instruction, and industry connections when making higher education decisions.

2 The single greatest consideration: Affordability.

“Tuition is affordable” is the most important personal and perceived societal higher education priority. However, Americans underestimate the intensity with which it is a priority to most other people.

3 Glaring differences between personal and perceived societal priorities.

Americans believe competitive sports, being perceived as elite, active social scenes, and a young student body motivate most people when deciding what institution to attend — despite being ranked among the least important drivers of personal preference.

4 Americans prioritize access over increased selectivity.

Rather than see higher education institutions develop their own criteria for admission — be it diversity-based or testing-based — Americans personally are looking for higher education institutions to develop standard open enrollment practices. Meaning, anyone having achieved a high school diploma or GED can enroll.

5 A challenge to the standard four-year diploma: Flexibility.

“Students are able to choose non-degree pathways” registered in Americans’ top quartile of priorities.

6 An appetite for applied learning over academic instruction.

On-the-job training in the form of internships, hands-on workshops and lab-based classes, and instruction from professors with practical experience all appear in the top 10 personal priorities for the American public, the college-bound and enrolled, their parents, college graduates, and those without a four year degree.

Introduction

The economic and operational stress of the COVID-19 pandemic is forcing every higher education institution to rethink its most basic assumptions. What is the purpose of a degree? What should campus life look like? What constitutes success?

In many ways, it's a reflection that's long overdue. Consider that tuition fees have been on the rise for the past twenty years for a product that's hardly changed. At elite institutions, applications have increased more than threefold, while supply — class seats — has remained stubbornly and artificially static.

These hard conversations and even harder choices about the future of higher education are more urgent now than ever. But should they proceed without the perspective of the American people — as taxpayers, as stakeholders — or that of students and their families — as consumers, as beneficiaries — they're bound to share a singular common trait. They'll all be incomplete. And the ultimate choices these conversations lead to will be worse for it

Which brings us to the core objective of this research: to ensure the public has a voice in what higher education evolves to look like, offer, become.

By taking stock of what matters most — and equally important, what matters less — to students, their families, and the country at large, this study elevates the public's priorities to affect immediate and long term strategic decisions.

"It's our belief that these insights can help return the interests of the American people to where they've always belonged in higher education: upfront and in focus."

— Todd Rose, Populace Co-Founder and President

Through application of choice-based conjoint methodologies, the results of this private opinion research not only speak to what Americans want out of higher education for themselves, but also what they believe most others want out of these higher education experiences. The differences that emerge between 'personal' and 'perceived societal' priorities separate actual, accurate and meaningful preferences from pervasive misconceptions.

Altogether, understanding American priorities can help decision makers, consumers, and the public make more informed choices as higher education navigates to a post-pandemic future.

Glossary of Terms

Higher education:

This survey defined higher education as “*Any formal education experience completed after high school or obtaining a GED. This can include community colleges, trade or vocational schools, skills programs or bootcamps, and/or colleges and universities.*” Participants answered the choice tasks asked to imagine they would be choosing a higher education institution on the basis that they were preparing to formally advance their K-12 education for the first time — meaning, not considering advanced degrees.

Note: Any specific references to colleges and/or universities are question specific.

Attribute:

This conjoint instrument comprised 66 possible attribute levels representing the elements of a higher education experience that might influence a person’s decision to enroll. Based on respondent selections, the results of the choice-based conjoint assign each attribute with a Share of Preference (SOP).

Share of preference (SOP):

The SOP reflects an attribute’s relative prioritization when choosing a higher education experience. The SOP of each attribute is reflected as a percentage out of 100. (Together, all the attribute’s SOPs sum to 100). The higher the SOP, the greater the priority of that attribute in informing the decision to enroll in a higher education experience.

Personal SOP / Personal ranking:

Personal SOP signals an attribute’s consideration share out of 100% when respondents choose a higher education experience *for themselves*. Personal ranking designates an attribute’s comparative priority when respondents choose a higher education experience *for themselves*.

Perceived Societal SOP:

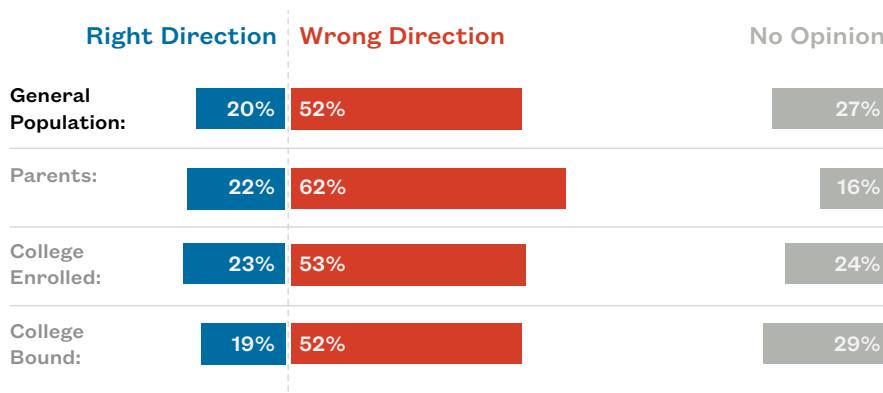
Perceived societal SOP signals an attribute’s consideration share out of 100% for the higher education experience that respondents *believe most others would choose for themselves*. Perceived societal ranking designates an attribute’s comparative priority when respondents choose the higher education experience they *believe most others would select for themselves*.

Higher Education Today

(1) Higher education is headed in the ‘wrong direction’ — but Americans don’t attribute the wayward trajectory to the coronavirus.

A full 52% of Americans believe higher education is headed in the ‘the wrong direction,’ while only 20% believe it is generally headed in the ‘right direction.’ Although college bound and college-enrolled students’ outlooks hold relatively in line with the general public’s, parents of college bound and enrolled students are a full 10 percentage points more likely to say that higher education is headed in ‘the wrong direction’ (62%).

Do you think America's higher education system is generally headed in the...?



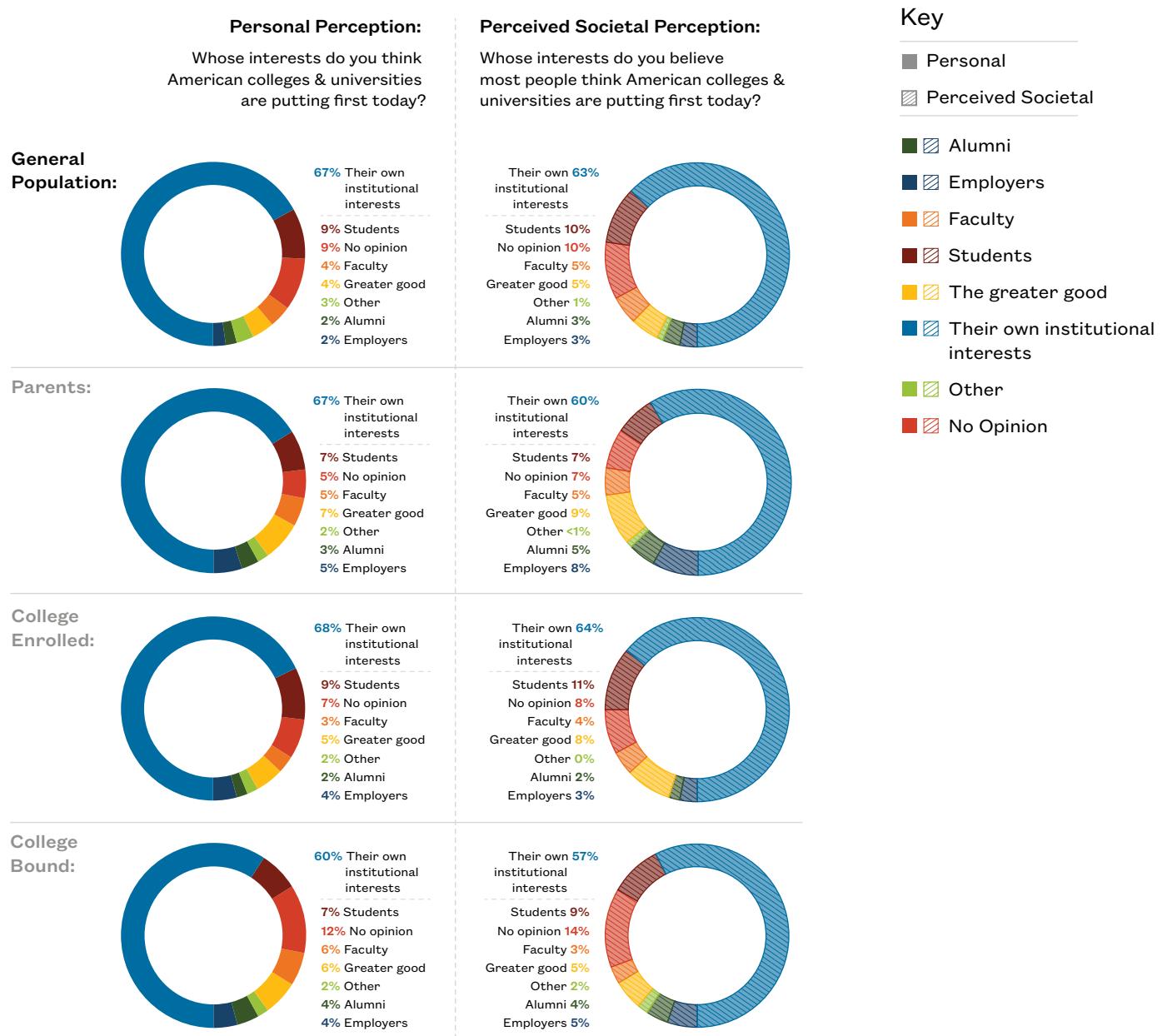
Note: 62% of Americans report that their opinion of colleges and universities has ‘stayed the same — becoming neither more positive or negative in light of these institutions’ response to the pandemic. That suggests the cause for Americans’ dissatisfaction with the higher education system is not simply a result of the pandemic alone.

Given colleges and universities’ response to the coronavirus, has your opinion of American colleges and universities become...?

	General Population	Parents	College Enrolled	College Bound
NET POSITIVE	15%	18%	15%	15%
Much more positive	3%	7%	4%	4%
Somewhat more positive	12%	11%	11%	11%
Stayed the same	62%	56%	53%	53%
Somewhat more negative	11%	17%	20%	14%
Much more negative	3%	6%	7%	6%
No Opinion	9%	4%	4%	11%
NET NEGATIVE	12%	10%	11%	17%

(2) Cause for discontent: widespread belief that colleges and universities put their own interests first.

A commanding majority of Americans (67%) believe colleges and universities today are putting their own institutional interests first (67%) — far ahead of those who believe these institutions serve students first (9%) or prioritizing the greater good first (4%). Not only do Americans *personally* believe that colleges and universities prioritize their own interests, they believe most Americans agree with them. A full 63% of Americans think that *most others* believe colleges and universities are primarily serving their own interests over those of employers, alumni, faculty and students themselves.

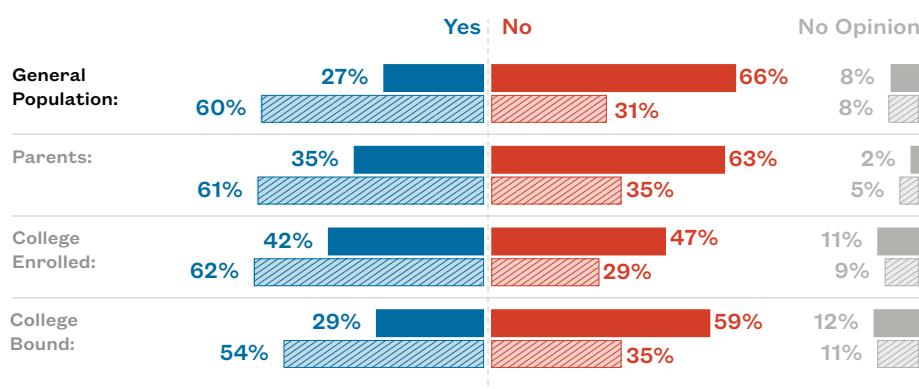


(3) Is a college degree necessary to achieve the American dream or enter the middle class? Most Americans say no — but they think most others say yes.

When asked “Do you believe it is necessary to have a college degree to achieve the American dream today?” less than 1/3 of the American public (27%) answers in the affirmative. Similarly, when asked “Do you believe it is necessary to have a college degree in order to be part of the American middle class today?” only 33% answer yes.

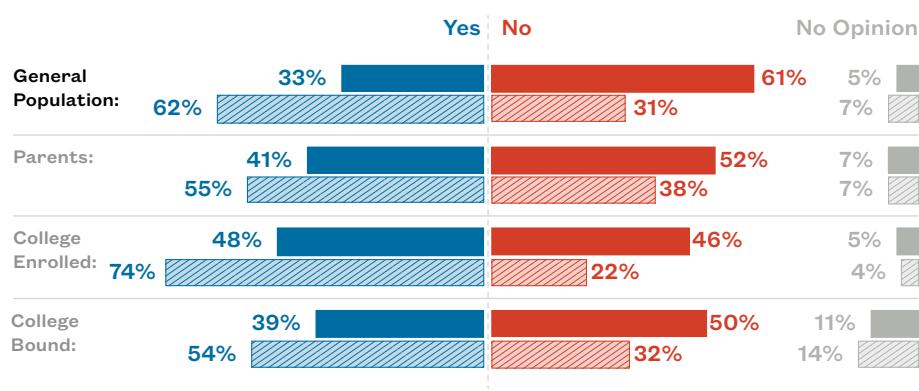
Do you believe it is necessary to have a college degree in order to achieve the American dream today?

Do you think most people believe it is necessary to have a college degree to achieve the American dream today?



Do you believe it is necessary to have a college degree in order to be part of the American middle class today?

Do you think most people believe it is necessary to have a college degree to be part of the American middle class today?



But belief in the necessity of a college degree changes drastically when asked “Do you believe most people think it is necessary to have a college degree [to achieve the American dream / in order to be part of the middle class] today?” A full 60% of Americans believe most others think you need a college degree to achieve the American dream; and again, 62% of Americans believe most others think you need a college degree to part of the middle class.

(4) Decisions to enroll or not enroll in college are driven by financial considerations.

Americans' decisions to enroll in or forego college are first and foremost determined by financial considerations. Consider that a full 50% of college graduates reported their primary motivation to attend college / university as "*earn access to better job prospects.*" Only 15% of college graduates reported their primary motivation was to "*Continue learning about the subjects that interest you,*" while 11% reported their primary motivation as to "*Fulfill a family or community expectation.*"

For Americans who didn't pursue higher education, the primary reason was once again financial in nature. A full 40% of those without any higher education reported their decision not to attend college / university was because they "*Couldn't afford it.*" The second most prevalent motivation at 13% was that respondents "*Realized college wasn't for me,*" followed by "*Had conflicting personal obligations*" at 11 percent. Only 9% of respondents without higher education reported their motivation to forego college or university as "*Wanted to pursue other employment options.*"

Thinking back to your personal decision to attend college / university, what was your primary motivation?	College enrolled	College bound	College Graduates
Earn access to better job prospects	54%	47%	50%
Continue learning about the subjects that interest you	17%	15%	17%
To learn new skills	12%	17%	11%
Fulfill family or community expectation	8%	9%	10%
Experience a rite of passage	3%	2%	4%
Develop new social connections	2%	2%	2%
Didn't know what else to do	2%	7%	4%
Other	2%	1%	2%

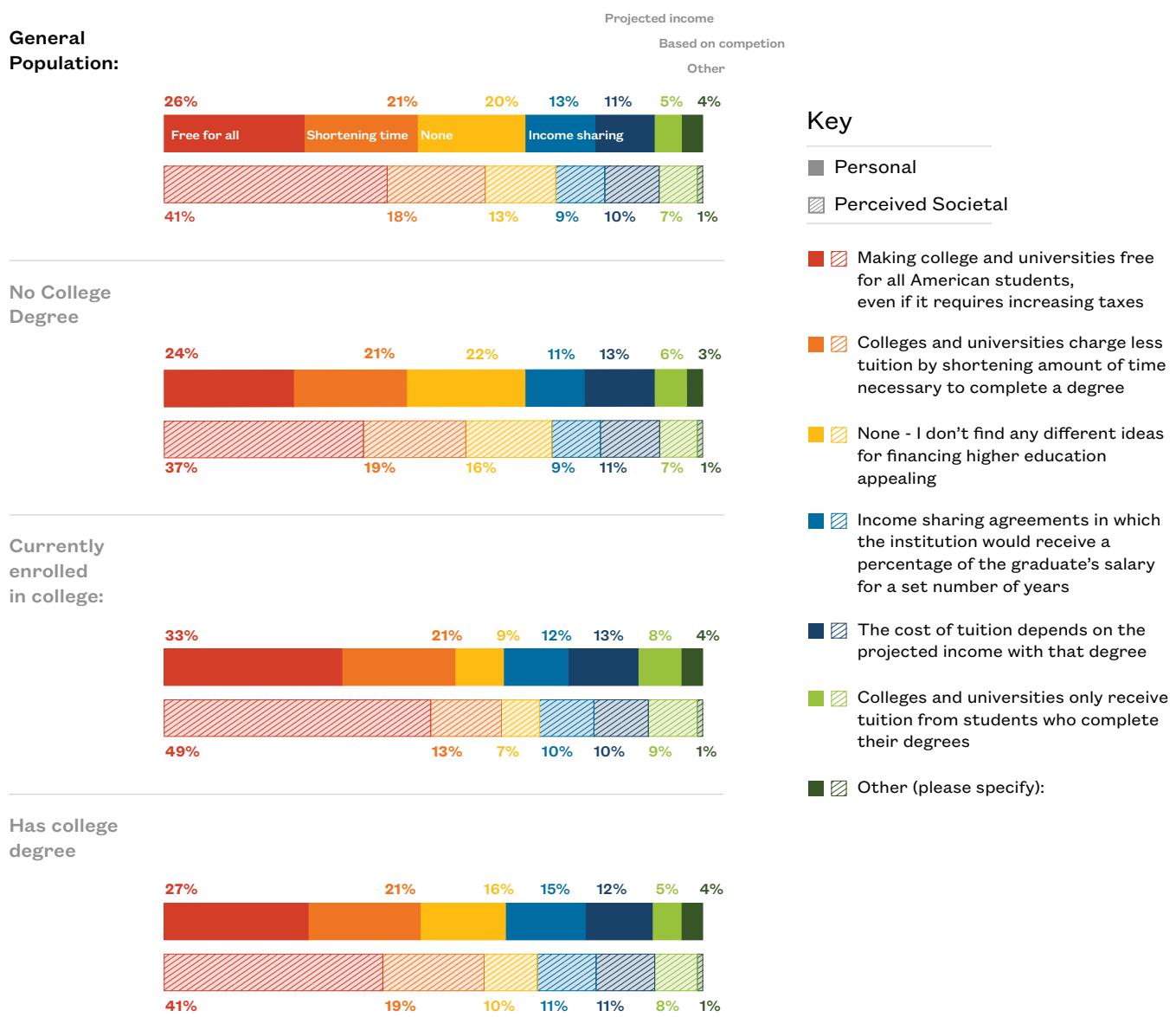
What was the primary reason you decided not to attend college or university?	W/o Higher Education
Couldn't afford it	40%
Realized college / university wasn't for me	13%
Had conflicting personal obligations	11%
Wanted to pursue other employment options	9%
Other	9%
Decided it wasn't the right time	6%
Decided that college was not worth the cost	6%
Wanted to pursue other education options	2%
Wasn't admitted to an institution I wanted to attend	2%
Didn't know how to manage applying	1%

(5) Limited support for “free college.”

Even with the prominence of financial consideration in Americans’ motivation to go or not to go to college, this private opinion research surfaces no personal or perceived societal majority support for “free college.” However, the perceived societal support for free college registered 15 points higher than respondents’ actual personal support. This suggests Americans believe there is greater support for free college reforms than truly exists.

Of the following ideas for reforming how students finance their higher education experiences and opportunities, **which do you personally prefer?**

Which do you think **most people would** find most appealing?

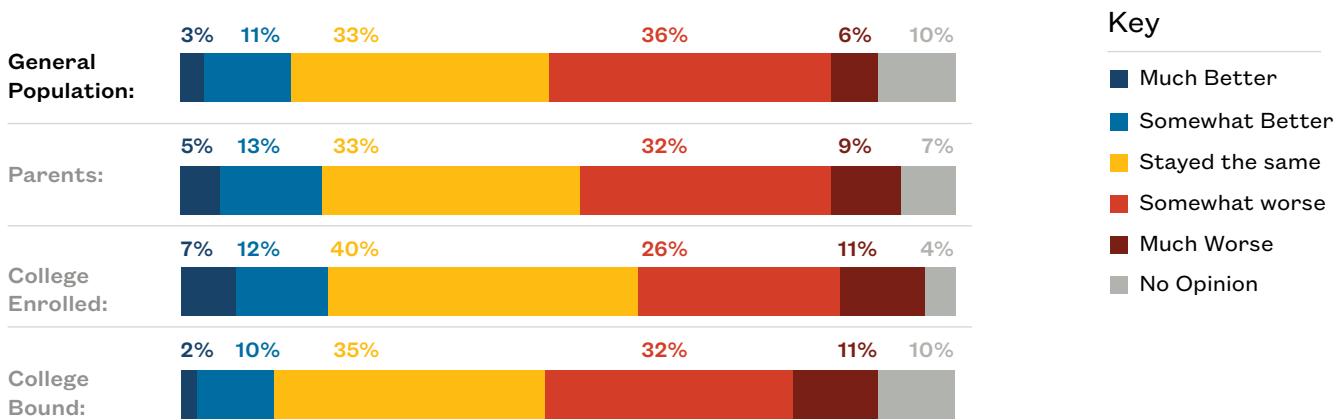


Higher Education and COVID-19

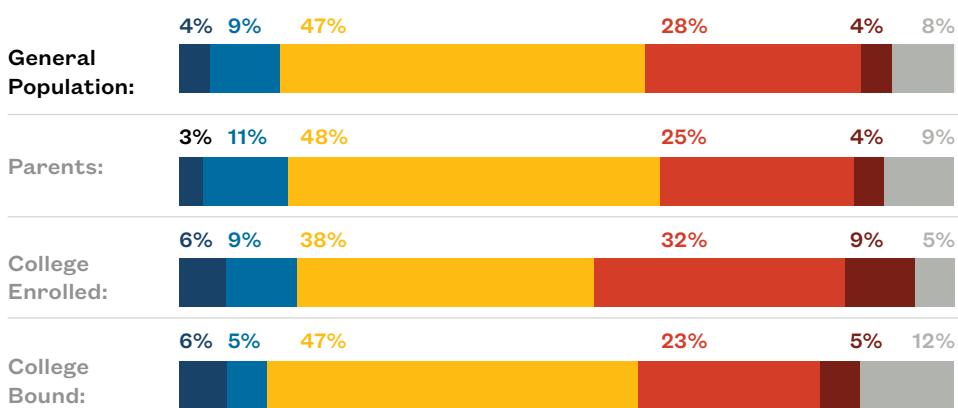
(6) Diminished expectations for the fall 2020 semester.

A full 42% of Americans believe the quality of the college or university experience will be worse than it was before the coronavirus epidemic. In addition, 32% of Americans believe the quality of college or university education will be worse when campuses re-open.

When colleges and universities reopen for the fall semester, how do you expect the **quality of the experience** they provide to compare with before the coronavirus?



When colleges and universities reopen for the fall semester, how do you expect the **quality of the education** they provide to compare with before the coronavirus?

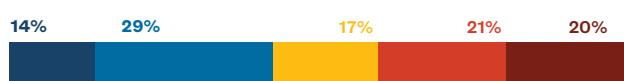


(7) Mild support for government bailouts to assist troubled colleges and universities.

When asked whether “*In light of the coronavirus pandemic, do you support or oppose the government providing American colleges and universities with bailout money?*” 42% of Americans signaled net support, 41% of Americans signaled net opposition, and 17% of Americans had no opinion. That’s not extensive bailout support colleges and universities can automatically rely on.

In light of the coronavirus pandemic, do you support or oppose the government providing American colleges and universities with bailout money?

General Population:



Key

- Strongly Support
- Somewhat Support
- No Opinion
- Somewhat Oppose
- Strongly Oppose

Parents:



College Enrolled:



College Bound:



(8) Americans no longer believe colleges should require the SAT / ACT for admissions.

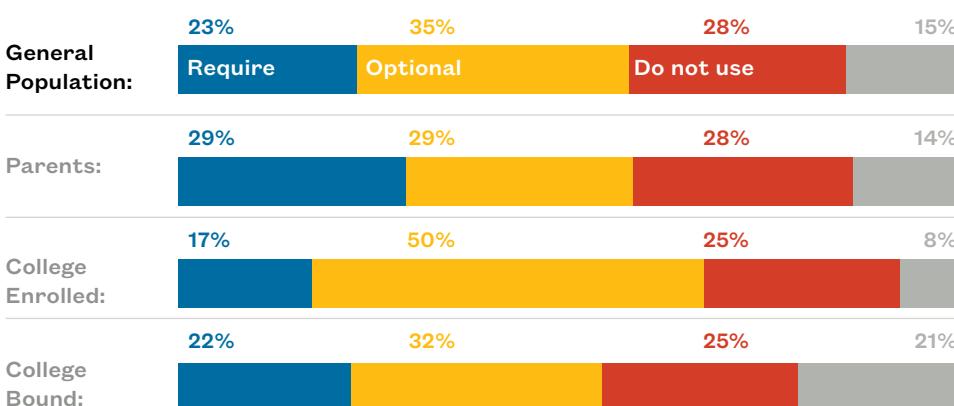
Americans are split on a knife's edge as to whether they view the college admissions process as fair (42% net) or unfair (42% net). But that doesn't mean there aren't elements of the admissions process Americans wouldn't be amenable to changing.

Would you say the current college admissions process in America is...?

	General Population	Parents	College Enrolled	College Bound
NET FAIR	42%	46%	45%	40%
Completely fair	6%	8%	9%	8%
More fair than unfair	36%	38%	36%	32%
No opinion	16%	10%	8%	16%
More unfair than fair	35%	35%	40%	35%
Completely unfair	7%	9%	8%	9%
NET UNFAIR	42%	44%	48%	44%

With the coronavirus making the SAT / ACT impossible for this year's crop of would-be test takers, Americans are showcasing a willingness to permanently drop this rite of passage. Only 23% of Americans believe college and universities should require the SAT / ACT in student applications moving forward; 35% believe it should be optional; and a full 28% believe colleges and universities shouldn't use the SAT / ACT in student admissions decisions at all.

Because of the coronavirus pandemic, many colleges and universities waived the typical requirement for ACT / SAT scores on this year's student applications. Moving forward, what do you think colleges and universities should do?



Key

- Require SAT / ACT scores on student applications
- Make SAT / ACT scores optional on student applications
- Not use SAT / ACT scores in student admissions decisions
- No Opinion

American Priorities for Higher Education

(9) American higher education priorities are *deeply practical*.

Americans personally prioritize financial considerations, job prospects, applied instruction, and industry connections when making higher education decisions. Meaning, considerations are influenced less by expectations of the higher education experience itself, and more by outcomes made possible by it.

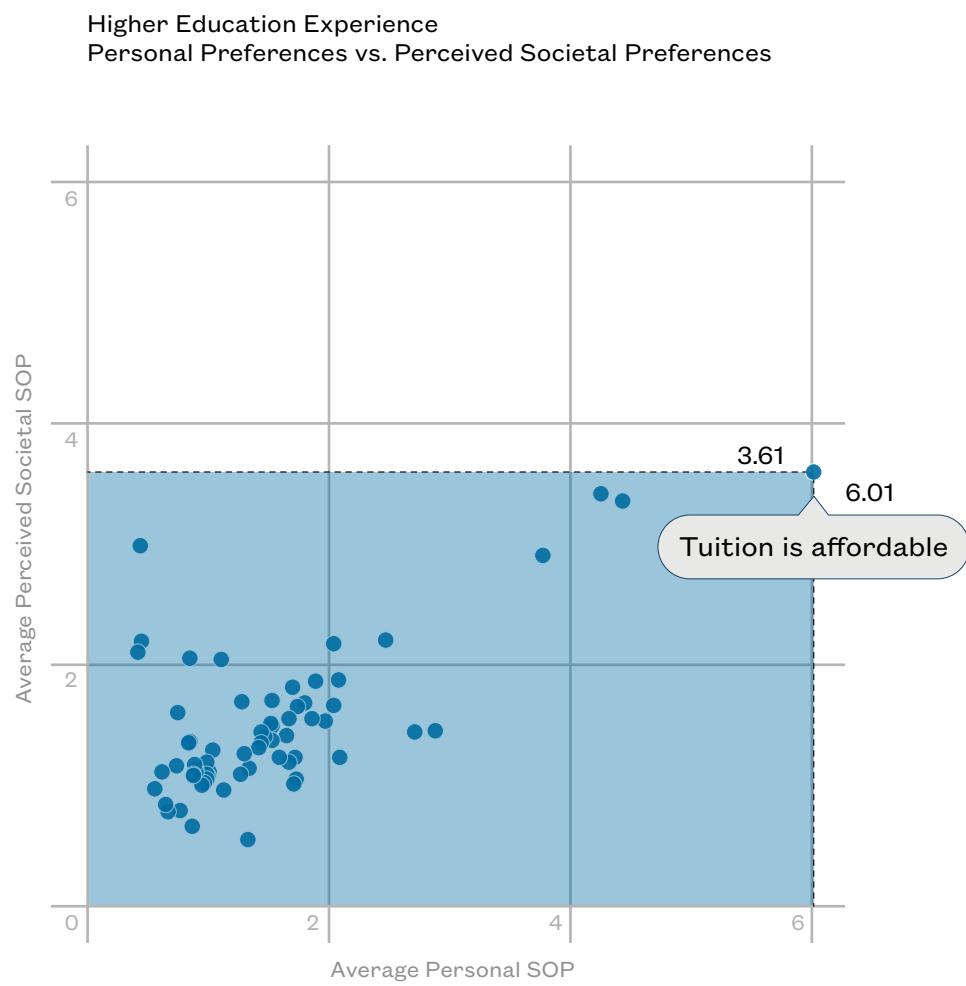
Americans' Top Personal Priorities for Higher Education	Personal Rank	Personal SOP
Tuition is affordable	1	6.01
The institution is committed to helping students graduate debt-free	2	4.43
Most graduates have a good-paying job within 9 months of graduation	3	4.25
Most graduates have a job they enjoy within 9 months of graduation	4	3.77
Classes are taught by instructors with practical experience in their field, not just academic credentials	5	2.88
Coursework includes hands-on learning (e.g. labs, workshops)	6	2.71
Students receive on-the-job training through internships	7	2.47
Students are connected with mentors in their desired field of work	8	2.09
The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll	9	2.08
Students are equipped with skills currently in-demand by prospective employers	10	2.04

Note: While Americans are pragmatic in their higher education preferences, it would be a mistake to read the results as suggesting American higher education priorities are solely utilitarian. The top 4th ranked attribute with 3.77 SOP: *"Most graduates have a job they enjoy within 9 months of graduation."* Additionally, the 9th ranked attribute with 2.08 SOP *"The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll,"* focuses on access and inclusion.

(10) The single greatest consideration: Affordability.

Of 66 different attributes, the top ranked personal priority emerged to be: “*tuition is affordable*” with 6.01 SOP. That’s more than a 35% increase from the second ranked personal higher education priority overall “*the institution committed to helping students graduate debt-free*” which holds 4.43 SOP and, notably, is also financial in nature.

Of note, even though “*tuition is affordable*” ranked first for both personal and perceived societal priorities, it received 6.01 personal SOP while only registering at 3.61 perceived societal SOP — suggesting Americans underestimate the prevalence of that priority for others by nearly 40 percent.¹



¹ There's an unavoidable element of interpretation here as 'affordability' has different connotations for different respondents. But what's not up for interpretation is the demonstrated fact that [average tuition and fees](#) have tripled at public four-year and more than doubled at public two and private nonprofit four-year institutions in the two decades between 1989-90 to 2019-20. Meanwhile, student debt has ballooned over national credit card debt.

(11) Americans prioritize access over increased selectivity.

Rather than see higher education institutions develop their own criteria for admission — be it diversity-based or testing-based — Americans personally are looking for higher education institutions to develop standard open enrollment practices. Meaning, anyone having achieved a high school diploma or GED enroll.

Access vs Selection Attribute Rankings	General Population		College Bound		College Enrolled		Parents		College Graduates		No 4-year Degree	
	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP
The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll	9	2.08	9	2.09	12	1.99	11	1.97	16	1.82	8	2.32
The institution reflects the demographic diversity (e.g. gender, ethnicity, age, etc.) of the United States	36	1.28	34	1.34	25	1.58	35	1.27	36	1.28	36	1.23
The institution enrolls students from underserved backgrounds	50	0.89	42	1.03	51	0.93	57	0.84	57	0.81	45	0.94
The institution enrolls students from other countries	61	0.65	60	0.73	60	0.74	61	0.68	62	0.68	61	0.58
The institution enrolls students with high standardized test scores (SAT / ACT)	62	0.62	63	0.6	61	0.66	59	0.8	60	0.75	63	0.47
This institution limits enrollment to students at the top of the applicant pool	63	0.56	62	0.61	63	0.56	63	0.58	63	0.63	62	0.51

Could this lead to demand outpacing supply at any given institution? Perhaps. But a practical solution would be a lottery system, rather than a competition, for available seats.

(12) A challenge to the standard four-year diploma: Flexibility.

Skills development is a top personal priority for the American public, the college bound and currently enrolled, their parents, college graduates, and those without a four year degree alike. But for all the emphasis on “skills *in-demand by prospective employers*,” “skills *to be competitive in a global job market*,” or even “*specific skills for a particular job*,” what deserves a second look is the diploma that typically endorses those skills.

Registering in the top quartile of priorities for almost all active consumer splits (the sole exception being the those currently enrolled in a four-year degree program) is an alternative: *skills gained when “students are able to choose non-degree pathways (e.g. micro-credentials, technical certifications, licensures, and alternate accreditations.”*

Skills Development and Pathways Rankings	General Population		College Bound		College Enrolled		Parents		College Graduates		No 4-year Degree	
	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP
Students are equipped with skills currently in-demand by prospective employers	10	2.04	14	1.86	11	1.99	8	2.16	8	2.17	12	1.95
Students are able to choose non-degree pathways (e.g. micro-credentials, technical certifications, licensures, and alternate accreditations).	13	1.89	12	1.89	19	1.8	14	1.85	14	1.87	11	1.96
Students are equipped with a set of foundational skills that are transferable between a range of jobs	15	1.8	19	1.67	18	1.83	16	1.83	13	1.91	18	1.71
Students are equipped with the skills to be competitive in a global job market	16	1.74	15	1.86	14	1.97	15	1.84	23	1.64	17	1.73
The institution develops students' practical life skills	17	1.73	16	1.74	28	1.53	19	1.7	21	1.68	16	1.75
Students are equipped with specific skills for a particular job	20	1.7	13	1.88	15	1.87	22	1.59	20	1.68	22	1.62
Duration of the program is pre-determined by the institution (e.g. 4-years)	52	0.88	48	0.95	46	1	53	0.87	54	0.84	48	0.89

(13) An appetite for applied learning over academic instruction.

American priorities for higher education paint a dynamic picture of learning in action. On-the-job training in the form of internships. Hands-on workshops and lab-based classes. Instruction from professors who have industry bona fides over textbook credentials. These three attributes appear in the top ten personal priorities for the American public, the college-bound and enrolled, their parents, college graduates, and those without a four year degree.

(14) The preference for in-person over online instruction isn't budging.

Americans generally and active higher education consumers still prioritize an in-person class experience over online alternatives. However, this personal priority isn't recognized as the perceived societal priority.

Whereas '*students attend classes in person*' registered across the board in the top half of personal priorities, the same attribute ranked in the bottom half, again across the board, as a perceived societal priority.

In-Person Vs Online Class Attendance Rankings	General Population		College Bound		College Enrolled		Parents		College Graduates		No 4-year Degree	
	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP
Students attend classes in person	22	42	21	42	23	40	25	44	17	44	23	43
Students attend classes online	40	36	33	38	42	32	41	37	51	39	37	35

(15) Remarkable consistency between the American public's priorities for higher education and those of active college consumers.

Of Americans' top 10 expressed personal priorities, college bound students, college enrolled students, and parents of college enrolled, bound students share at least seven of the same considerations in their own top ten expressed personal priorities. In fact, Americans at large, college bound students, currently enrolled college students, and their parents share the exact same six top priorities in that exact order; Americans at large college bound students are lockstep in nine out of ten top personal priorities.

Americans' Top Personal Priorities for Higher Education Align With Those of Active Higher Education Consumers	General Population		College Bound		College Enrolled		Parents	
	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP	Priv. Rank	Priv. SOP
Tuition is affordable	1	6.01	1	6.08	1	4.83	1	5.73
The institution is committed to helping students graduate debt-free	2	4.43	2	4.14	2	4.31	2	4.25
Most graduates have a good-paying job within 9 months of graduation	3	4.25	3	3.87	3	4.02	3	4.08
Most graduates have a job they enjoy within 9 months of graduation	4	3.77	4	3.57	4	3.26	4	3.74
Classes are taught by instructors with practical experience in their field, not just academic credentials	5	2.88	5	2.88	5	2.82	5	2.78
Coursework includes hands-on learning (e.g. labs, workshops)	6	2.71	6	2.61	6	2.68	6	2.66
Students receive on-the-job training through internships	7	2.47	7	2.38	8	2.17	7	2.29
Students are connected with mentors in their desired field of work	8	2.09	8	2.24	13	1.99	13	1.96
The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll	9	2.08	9	2.09	12	1.99	11	1.97
Students are equipped with skills currently in-demand by prospective employers	10	2.04	14	1.86	11	1.99	8	2.16

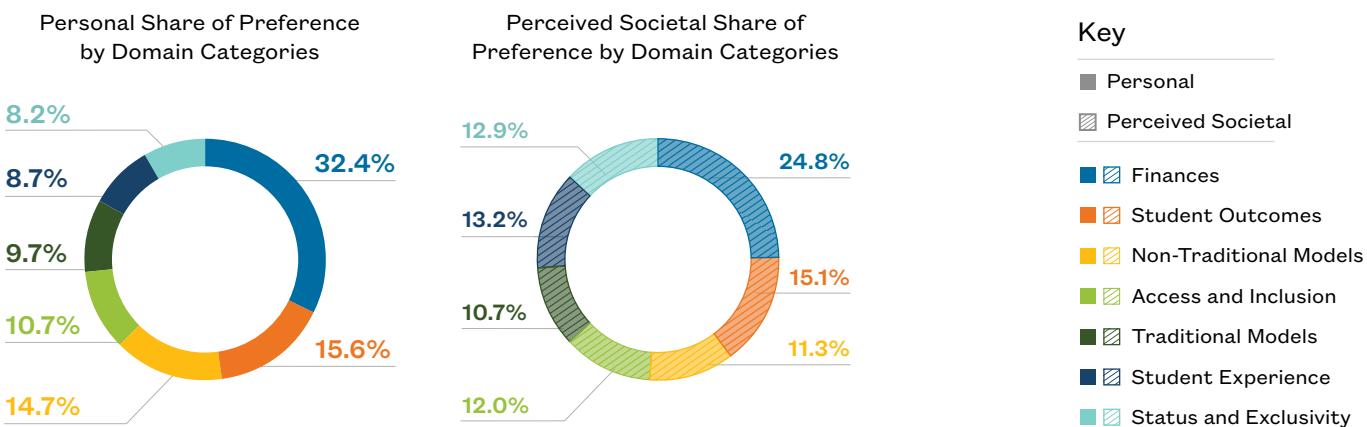
The takeaway: Neither Americans generally nor college consumers specifically prioritize higher education for the sake of advanced learning or personal enrichment alone. The emphasis is on practical considerations — affordability, applied learning, and job prospects upon completion.

Uncovering Common Misconceptions About Higher Education Priorities

(16) Sizable disparities between personal and perceived societal priorities for higher education.

Personal higher education priorities signal what Americans *actually* value; Perceived societal higher education priorities uncover the *beliefs* about what Americans think most others value.

By grouping the tested attributes into domains and calculating each domain's respective relative importance² as part of a higher education 'priority pie', the results reveal substantial disparities between the domains that Americans personally prioritize and the domains they believe most others prioritize.



While personal and perceived societal priority pies both show "Finances" and "Student Outcomes" as the top two domains, that's where the similarities largely end.³

Americans personally value Non-Traditional Models — which includes attributes "*Students are able to choose non-degree pathways (e.g. micro-credentials, technical certifications, licensures, and alternate accreditations)*," "*Classes are taught by instructors with practical experience in their field, not just academic credentials,*" "*Students receive an education focused on their interests and aspirations,*" etc. — and Access and Inclusion. They deprioritize attributes pertaining to "Traditional Models" — which includes attributes such as, "*A majority of the student body is between the ages of 18-25,*" "*Students are placed in courses based on their ability or prior performance,*" "*Most students live on campus or in nearby housing,*" etc. — Student Experience, and Status and Exclusivity.

What's more, Americans believe that most others prioritize higher education attributes pertaining to Student Experience as well as Status and Exclusivity, over Access and Inclusion and modes of learning grouped in either the Non-Traditional Model or Traditional Model.

² The relative importance of each domain is found by summing the share of preference for each attribute in a domain. The summed share of preference is then divided by the total number of attributes in that domain. The resulting values for the seven domains are then rescaled to 100.

³ For full attribute listing by domain groupings, please see Appendix B.

(17) Definitive personal priorities are hidden by common misconceptions.

With attributes placed into domain-based categories, three clear personal prioritizations emerge: 1. Student Outcomes over Student Experience with a SOP delta of 6.9; 2. Access and Inclusion over Status and Exclusivity with a SOP delta of 2.5; and 3. Non-Traditional Models over Traditional Models with a SOP delta of 5.

	Student Outcomes	Student Experience	Δ	Access and Inclusion	Status and Exclusivity	Δ	Non-Traditional Model	Traditional Model	Δ
Personal SOP	15.6	8.7	6.9	10.7	8.2	2.5	14.7	9.7	5
Perceived Societal SOP	15.1	13.2	1.9	12	12.9	-0.9	11.3	10.7	0.6
Δ	0.5	-4.5	--	-1.3	-4.7	--	3.4	-1	--

However, when viewed through the lens of perceived societal preference, those deltas are greatly reduced, and in one case, inverted: Student Outcomes over Student Experience registers an SOP delta of 1.9; 2. Access and Inclusion over Status and Exclusivity registers a SOP delta of -0.9; and 3. Non-Traditional Models over Traditional Models registers a SOP delta of 0.6. This suggests that these true American personal priorities for higher education — though definitive — aren't recognized as such. These three clearcut personal priorities are obscured in the misperception of what Americans think others value from higher education.

To the same point, the SOP deltas between personal and perceived societal for Student Experience, Status and Exclusivity, and Traditional Model domains are all negative values. Meaning, that respondents believe these categories matter more for others in their higher education evaluations than they actually do.

(18) Top ranked perceived societal higher education priorities register among the least important personal higher education priorities.

Showcasing the sheer extent of the misconceptions about higher education, consider that four factors which rank in the *top quartile* of perceived societal higher education priorities actually register in the *bottom quartile* of ranked personal priorities. That three of the *top ten* perceived societal higher education priorities register in the bottom ten personal priorities. And the top ten perceived societal higher education priorities actually includes the very last — *the absolute bottom ranked* — personal higher education priority. (“*Institution has a reputation for an active social scene [e.g. student parties]*” ranks 9th out of 66 in perceived societal priorities but 66th out of 66 possibilities in personal priorities.)

Top Misalignments Between Americans' Personal & Perceived Societal Priorities	Perceived Soc. Rank	Personal Rank	Perceived Soc. SOP	Personal SOP	Δ
Institution has competitive sports teams	4	65	3	0.44	-2.56
The institution is perceived as elite	7	64	2.21	0.45	-1.76
Institution has a reputation for an active social scene (e.g. student parties)	9	66	2.12	0.42	-1.7
A majority of the student body is between the ages of 18-25	10	54	2.07	0.85	-1.22

The takeaway: Not only are disparities between personal and perceived societal higher education preferences notable, they're also consequential. Unchecked misunderstandings can sway the direction of higher education strategic planning and investments, creating a landscape that's at odds with true American priorities.

Higher Education Priorities Per Population SubGroups

(19) Unanimity across population subgroups in higher education preferences.

Americans' personal priorities for higher education are defined by remarkable consistency not just between the country at large and consumers specifically, but across all population groups. Whether looking at the results through the lens of political identity, race, income, or gender, the major findings — the emphasis on financial considerations, the pragmatic streak, the preference for applied learning over typical academic instruction — all hold.

Personal Rank of Attributes:	Gen Pop #	Dems #	GOP #	Low Income <35k #	Mid Income 35-75k #	High Income >75 #	White #	Black #	Asian #	Hispanic	Other race #	Male #	Female #
Tuition is affordable	1	1	1	1	1	1	1	1	1	1	1	1	1
The institution is committed to helping students graduate debt-free	2	2	2	2	2	3	2	2	3	2	2	3	2
Most graduates have a good-paying job within 9 months of graduation	3	3	3	3	3	2	3	3	2	3	3	2	3
Most graduates have a job they enjoy within 9 months of graduation	4	4	4	4	4	4	4	4	4	4	4	4	4
Classes are taught by instructors with practical experience in their field, not just academic credentials	5	5	5	5	5	5	5	5	6	5	5	5	5
Coursework includes hands-on learning (e.g. labs, workshops)	6	6	6	6	6	6	6	6	5	6	6	6	6
Students receive on-the-job training through internships	7	7	7	7	7	7	7	7	7	8	8	7	7
Students are connected with mentors in their desired field of work	8	9	11	10	8	9	8	8	18	7	14	8	9
The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll	9	8	14	8	9	13	10	9	19	10	7	12	8
Students are equipped with skills currently in-demand by prospective employers	10	11	8	12	10	8	9	14	8	11	9	10	11

(20) Misconceptions about higher education values hold strong across population subgroups.

If personal higher education priorities hold strikingly steady across population subgroups, so too do perceived -societal priorities.

All subgroups believe most other people would prioritize higher education characterized by the institution having competitive sports teams, being perceived as elite, having a reputation for an active social scene, and having a majority of the student body being between ages of 18-25 — despite these attributes appearing in the general populations' bottom quartile of all tested priorities.

Perceived Societal Rank of Attributes:	Gen Pop	Perceived Soc. Rank	Gen Pop	Personal Rank	Gen Pop	Perceived Soc SOP	Dems #	GOP #	Low Income <35k #	Mid Income 35-75k #	High Income >75 #	White #	Black #	Asian #	Hispanic	Other race #	Male #	Female #
Tuition is affordable	1	1	3.61	1	1	1	2	1	1	1	1	1	1	1	3	1	1	1
Most graduates have a good-paying job within 9 months of graduation	2	3	3.43	2	2	3	1	3	2	3	2	3	2	2	3	2	3	3
The institution is committed to helping students graduate debt-free	3	2	3.37	3	3	2	3	2	3	2	3	2	5	1	4	4	4	2
Institution has competitive sports teams	4	65	3	4	5	4	4	5	4	4	5	4	4	4	5	2	3	5
Most graduates have a job they enjoy within 9 months of graduation	5	4	2.92	5	4	5	5	4	5	4	5	5	3	4	5	5	5	4
Students receive on-the-job training through internships	6	7	2.22	6	6	8	8	6	6	7	7	7	6	17	6	6	6	6
The institution is perceived as elite	7	64	2.21	8	12	6	6	11	9	6	9	11	10	9	11	10	9	8
Students are equipped with skills currently in-demand by prospective employers	8	10	2.19	7	7	10	9	7	7	7	8	6	13	7	10	7	10	7
Institution has a reputation for an active social scene (e.g. student parties)	9	66	2.12	10	9	7	11	8	8	9	8	7	6	8	9	6	8	9
A majority of the student body is between the ages of 18-25	10	54	2.07	9	14	9	10	9	11	11	10	9	11	10	9	11	11	10

(21) While personal higher education priorities are broadly uniform, population subgroups assess on-the-ground higher education realities with notable differences.

When it comes to priorities for the future, Americans -- across political parties, income levels, race and gender -- are virtually unanimous in their wants and needs. It's when assessing present higher education realities that significant differences emerge along demographic lines.

Consider that:

- Less than a third of the American public (27%) believe that it is necessary to have a college degree to achieve the American dream. Similarly only 33% believe you need a college degree to be part of the American middle class. When broken down by political affiliation, Democrats (40%) are more likely to say a college degree is necessary to achieve the American Dream in stark contrast to Independents (21%) and Republicans (25%). Democrats (46%) are also more likely to say a college degree is necessary to be part of the American middle class than Independents (35%) Republicans (26%).
- Respondents from low income households are less likely to view their return on investment from higher education positively than the general population. Only 11% of low income households consider their degree to have a "high return on investment," 34% reported a "moderate return on investment," 29% reported a "low return on investment," and 26% reported absolutely "no return on investment." Of the general population with a higher education degree, 23% report a "high return on investment," 40% report a "moderate return on investment," 24% report a "low return on investment," and only 14% absolutely "no return on investment."
- There are disparities in the way white Americans and communities of color view the fairness of higher education. For example, only 33% of Black respondents believe that the college admissions process is net "fair," compared to 45% of whites or 42% of the general population sample. Only 12% of Black respondents say we should require SAT / ACTs on college admissions — compared to 25% of whites.

Methodology

Integrity Statement

Powered by **Gradient Metrics**, the national survey was completed by a general population sample of 2,038 respondents. Additional oversampling contributed to segmentation of college-bound students (609 respondents), college-enrolled students (292 respondents), college graduates (682 respondents), and parents of college-bound and/or college enrolled students (500 respondents).

The **total number** of respondents who participated in this survey: **2,785 people**.

The survey used opt-in panel provider Symmetric Sampling; it used a non-probability based sample. The conjoint received a percent certainty score of 72% (personal) - 73% (perceived societal). The scores achieved suggest exceptional model fit.

Panel provider: **Symmetric Sampling**
Dates in field: **May 28 - June 9, 2020**

For questions or comment, contact **research@populace.org**.

Conjoint: Setting priorities

Rather than directly asking respondents what preferences they hold for their own higher education experience, this survey used a choice-based-conjoint (CBC) instrument that forced respondents to make tradeoffs in their priorities. This also reduces the ceiling effect where respondents can claim everything is important (or unimportant).

For each choice task, respondents are asked to select:

1. the profile of a higher education experience that is closer to what they would choose for themselves; and
2. the profile of a higher education experience that is closer to what they think most people would choose for themselves.

The outcome of the CBC is the contribution of each level to setting the higher education priorities of the education system according to an individual preference and that of society's perceived preference.

Example Choice Task

Levels randomly populate across multiple choice tasks per respondent.

Option A	Option B
Most graduates have a good paying job within 9 months of graduation	Students receive a well-rounded education
Students are equipped with specific skills for a particular job	Most graduates have a job they enjoy within 9 months of graduation
Tuition can be financed with loans	Students have the option to choose the courses they want to study based on interests and aspirations
Institution offers career development services (e.g. resume and interview skill workshops, job or internship postings)	Institution has competitive sports teams
Institution has competitive sports teams	The institution has relationships with potential employers
Most students live off-campus	The institution serves as a community hub of activity

"Question: Which of the following higher education experiences would you choose for **yourself?**"

Option A	Option B
"Question: Which of these options do you think most people would choose for themselves?"	
Option A	Option B

Appendix A

Full Conjoint Results - Gen Pop Ranking (1/3)	Gen Pop Personal Rank	Gen Pop Personal SOP	Gen Pop Perceived Societal Rank	Gen Pop Perceived Societal SOP
Tuition is affordable	1	6.01	1	3.61
The institution is committed to helping students graduate debt-free	2	4.43	3	3.37
Most graduates have a good-paying job within 9 months of graduation	3	4.25	2	3.43
Most graduates have a job they enjoy within 9 months of graduation	4	3.77	5	2.92
Classes are taught by instructors with practical experience in their field, not just academic credentials	5	2.88	26	1.47
Coursework includes hands-on learning (e.g. labs, workshops)	6	2.71	27	1.46
Students receive on-the-job training through internships	7	2.47	6	2.22
Students are connected with mentors in their desired field of work	8	2.09	38	1.25
The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll	9	2.08	12	1.89
Students are equipped with skills currently in-demand by prospective employers	10	2.04	8	2.19
Students have the option to choose the courses they want to study based on interests and aspirations	11	2.04	18	1.68
The institution has relationships with potential employers	12	1.97	23	1.55
Students are able to choose non-degree pathways (e.g. micro-credentials, technical certifications, licensures, and alternate accreditations).	13	1.89	13	1.88
The institution is a leader in scientific research and innovation	14	1.86	22	1.57
Students are equipped with a set of foundational skills that are transferable between a range of jobs	15	1.8	17	1.7
Students are equipped with the skills to be competitive in a global job market	16	1.74	19	1.67
The institution develops students' practical life skills	17	1.73	56	1.07
Students are evaluated by how they demonstrate understanding of a subject in real-world applications	18	1.72	39	1.25
Institution develops students' character (integrity, morals, values)	19	1.71	58	1.03
Students are equipped with specific skills for a particular job	20	1.7	14	1.83
Students are equipped with the skills they'll need to pursue advanced graduate degrees	21	1.67	21	1.57
Students attend classes in person	22	1.67	42	1.21

Full Conjoint Results - Gen Pop Ranking (2/3)	Gen Pop Personal Rank	Gen Pop Personal SOP	Gen Pop Perceived Societal Rank	Gen Pop Perceived Societal SOP
Students receive an education focused on their interests and aspirations	23	1.65	29	1.43
This institution has a low student-to-faculty ratio	24	1.59	40	1.25
The institution accepts all credits earned from other institutions	25	1.53	15	1.72
Institution offers career development services (e.g. resume and interview skill workshops, job or internship postings)	26	1.53	25	1.51
Students receive a well-rounded education	27	1.53	31	1.39
The institution accepts college credits earned in high school	28	1.52	24	1.53
Graduates feel confident in their own capabilities	29	1.47	30	1.42
Students feel known by their instructors	30	1.44	28	1.46
Institution offers resources to support student physical and mental well-being	31	1.44	33	1.37
Students are offered a range of cultural opportunities (e.g. concerts, theater, expert speaker series)	32	1.42	35	1.33
Past graduates are recognized as the best in their respective fields	33	1.34	45	1.16
A majority of the student body is 25 years or older	34	1.33	66	0.57
Students learn from exposure to different ideas and beliefs	35	1.3	37	1.28
The institution reflects the demographic diversity (e.g. gender, ethnicity, age, etc.) of the United States	36	1.28	16	1.71
Students are required to follow the curriculum of their desired major	37	1.27	51	1.11
Students learn by having their perspectives challenged	38	1.13	61	0.98
The institution is ranked highly in national reports (e.g. US News & World Report, Princeton Review)	39	1.11	11	2.06
Students attend classes online	40	1.04	36	1.31
Duration of the program is determined by student circumstances and ability	41	1.01	47	1.13
Students graduate with memories they cherish	42	1	54	1.1
Students are placed in courses based on their ability or prior performance	43	0.99	41	1.21
Students are evaluated through tests administered by instructors	44	0.99	50	1.11

Full Conjoint Results - Gen Pop Ranking (3/3)	Gen Pop Personal Rank	Gen Pop Personal SOP	Gen Pop Perceived Societal Rank	Gen Pop Perceived Societal SOP
Institution has an attractive and well-maintained physical campus	45	0.99	55	1.07
The institution serves as a community hub of activity	46	0.97	57	1.04
Students have the option to study abroad	47	0.95	59	1.02
Students graduate with a shared set of American values	48	0.9	46	1.15
Institution promotes a tight-knit community feel	49	0.9	48	1.13
The institution enrolls students from underserved backgrounds	50	0.89	43	1.19
Students are required to take a common set of general courses	51	0.88	52	1.11
Duration of the program is pre-determined by the institution (e.g. 4-years)	52	0.88	53	1.1
Students are evaluated by 3rd party industry experts within their field of study	53	0.87	65	0.68
A majority of the student body is between the ages of 18-25	54	0.85	10	2.07
Students have access to a strong alumni network	55	0.85	32	1.38
Most students live on campus or in nearby housing	56	0.84	34	1.37
Most students live off-campus	57	0.77	63	0.81
Institution offers formal social networks (e.g. Greek life, interest-based clubs)	58	0.75	20	1.62
Tuition can be financed with loans	59	0.74	44	1.18
Many graduates pursue careers in public service	60	0.67	64	0.8
The institution enrolls students from other countries	61	0.65	62	0.86
The institution enrolls students with high standardized test scores (SAT / ACT)	62	0.62	49	1.13
This institution limits enrollment to students at the top of the applicant pool	63	0.56	60	0.99
The institution is perceived as elite	64	0.45	7	2.21
Institution has competitive sports teams	65	0.44	4	3
Institution has a reputation for an active social scene (e.g. student parties)	66	0.42	9	2.12

Appendix B

Domain Groupings:

Stand Alone	Pairing one		Pairing Two		Pairing Three	
Finances	Traditional model >>	<<Non-traditional models	Student Experience >>	<< Student Outcomes	Status and Exclusivity >>	<< Access and Inclusion
Most graduates have a good-paying job within 9 months of graduation	Students attend classes in person	Students attend classes online	Institution has a reputation for an active social scene (e.g. student parties)	Most graduates have a job they enjoy within 9 months of graduation	The institution enrolls students with high standardized test scores (SAT / ACT)	The institution enrolls students from underserved backgrounds
Tuition can be financed with loans	A majority of the student body is between the ages of 18-25	A majority of the student body is 25 years or older	Students are offered a range of cultural opportunities (e.g. concerts, theater, expert speaker series)	Students are equipped with skills currently in-demand by prospective employers	This institution limits enrollment to students at the top of the applicant pool	The institution enrolls students from other countries
Tuition is affordable	Duration of the program is pre-determined by the institution (e.g. 4-years)	Duration of the program is determined by student circumstances and ability	Institution promotes a tight-knit community feel	Students are equipped with specific skills for a particular job	The institution is perceived as elite	The institution reflects the demographic diversity (e.g. gender, ethnicity, age, etc.) of the United States
The institution is committed to helping students graduate debt-free	Students are evaluated through tests administered by instructors	Students have the option to choose the courses they want to study based on interests and aspirations	Institution has competitive sports teams	Students are equipped with a set of foundational skills that are transferable between a range of jobs	The institution is ranked highly in national reports (e.g. US News & World Report, Princeton Review)	The institution offers open enrollment, meaning anyone with a high school diploma or GED can enroll
	Students are required to follow the curriculum of their desired major	Students are able to choose non-degree pathways (e.g. micro-credentials, technical certifications, licensures, and alternate accreditations).	Institution offers formal social networks (e.g. Greek life, interest-based clubs)	Students are equipped with the skills to be competitive in a global job market	Students have access to a strong alumni network	The institution accepts all credits earned from other institutions
	Students are placed in courses based on their ability or prior performance	Students receive an education focused on their interests and aspirations	Students have the option to study abroad	Students are equipped with the skills they'll need to pursue advanced graduate degrees	Past graduates are recognized as the best in their respective fields	The institution accepts college credits earned in high school
	Institution has an attractive and well-maintained physical campus	Most students live off-campus	Students feel known by their instructors	Graduates feel confident in their own capabilities	The institution is a leader in scientific research and innovation	The institution serves as a community hub of activity
	Students are required to take a common set of general courses	The institution develops students' practical life skills	Students graduate with memories they cherish	Many graduates pursue careers in public service		Students learn from exposure to different ideas and beliefs
	Students receive a well-rounded education	The institution has relationships with potential employers	This institution has a low student-to-faculty ratio			
	Most students live on campus or in nearby housing	Students are connected with mentors in their desired field of work	Institution offers resources to support student physical and mental well-being			
	Students learn by having their perspectives challenged	Coursework includes hands-on learning (e.g. labs, workshops)				
	Students graduate with a shared set of American values	Students receive on-the-job training through internships				
	Institution develops student character (integrity, morals, values)	Classes are taught by instructors with practical experience in their field, not just academic credentials				
	Institution offers career development services (e.g. resume and interview skill workshops, job or internship postings)	Students are evaluated by how they demonstrate understanding of a subject in real-world applications				
		Students are evaluated by 3rd party industry experts within their field of study				

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