

NELSON

COVID-19 IMPACT ASSESSMENT

*Outlook & Implications
For Higher Education*



NELSON Worldwide conducted a comprehensive evaluation of COVID-19's impact across industries to arm our clients and partners with short- and long-term solutions to best respond, adapt, and innovate in the wake of COVID-19.

Our Impact Assessment identifies macro trends and implications that will drive shifts in business models, brand development, and the design of built environments — and ultimately, shape the human experience.

As an integrated architecture, design, and strategy firm that works across retail, restaurant, hospitality, workplace, mixed-use, industrial, healthcare, and public sector industries, NELSON is uniquely positioned to leverage our collective expertise to:

- Analyze user behavior, attitudes, and values
- Synthesize emerging patterns into actionable opportunities
- Develop relevant innovation and implementation strategies
- Partner with clients to navigate this unprecedented landscape

INDUSTRY SNAPSHOT: IMPACT ON SECTORS



RESIDENTIAL UNIVERSITIES

Residential Universities will face the biggest challenges in reopening, acting as self-contained cities. Considerations will be taken for faculty and staff to ensure comfort and safety.



RESIDENTIAL REGIONAL COLLEGES

As the concept of local comes into focus it will be important for these locations to create strategic partnerships for amenities and housing to ensure relevance.



TECHNICAL COLLEGES

This sector will need to innovate new ways to provide hands-on education and project-based learning in socially-distanced settings to ensure appropriate skills.



NON-RESIDENTIAL COMMUNITY COLLEGES

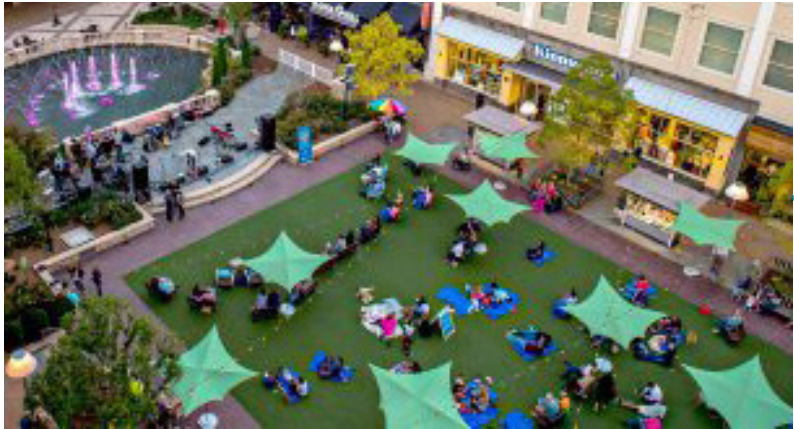
Ensuring that the programs and amenities offered to students remain relevant will be a focus for non-residential locations looking to activate the next generation of students.

INDUSTRY SNAPSHOT: IMPACT ON CORE COMPONENTS



DINING / FOOD-SERVICE

Dining will be expected to adapt to the same requirements that restaurants have been faced with. Students will pivot to delivered meals and prepackaged options.



PUBLIC & COMMUNAL SPACES

In the short-term, safety and distance will be paramount. Moving forward, public spaces will be re-framed as outdoor escape and respites with implications on wellness and sustainability.



CLASSROOMS & LABS

The traditional lecture hall model will adapt to meet the expectation for additional spaces between students. Technology will see higher adoption to encourage choice in learning styles.



HEALTH & WELLNESS AMENITIES

Shared amenities will be under the microscope for hygiene—but ultimately, will remain. Higher access will be expected for mental health services.



HOUSING

Residential campuses will need to address spread concerns through decreases in density as well as through environments that drive appropriate behavioral changes.



ADMINISTRATIVE

The unseen side of higher education will shift to include more digital one-on-one calls with advisors and a return to reassurance and personalization over mass communications.

In This Assessment:

IMMEDIATE IMPACT

Considerations, tactics, and solutions for short-term implementation in the built environment as places reopen

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- 04 | CHOICE-DRIVEN INTERACTIONS
- 05 | MEANINGFUL EXTENSIONS
- 06 | CONCIERGE MINDSET
- 07 | RESPONSIVE RELEVANCE

Manifestation: tangible examples of how a trend is coming to life

EXPANDED INFLUENCE

Long-term shifts in attitudes, beliefs, and values that will shape the future of higher education sites

- 01 | A NEWFOUND CAMARADERIE
- 02 | WIDESPREAD WELLNESS
- 03 | COMMITMENT TO COMMUNITY
- 04 | REDEFINED ESSENTIALISM
- 05 | SOCIAL AMPLIFICATION

Driver: sociocultural or consumer influence

Implication: resulting outcome for brands & businesses



IMMEDIATE IMPACT

Considerations, tactics, and solutions for short-term implementation in the built environment as places reopen



SEEING CLEAN

Clearly visible solutions that signal the new cost-of-entry for sanitation – reassuring students, faculty, and visitors they are safe

MANIFESTATIONS

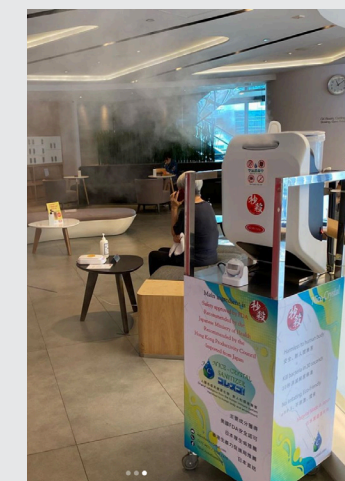
- Establishing a new design aesthetic that signals clean
- More outdoor spaces and a purposeful integration between indoors and outdoors
- More, and highly visible, sanitation stations
- Staff dedicated to the task of cleaning at increased intervals
- Screening of students and staff at entry points
- A return to disposable, resulting in a short-term tension with sustainability
- Prominent graphics and messaging to communicate and reinforce protocols, safety, and efficacy



Public locations are experimenting with automated UV scrubbers to clean its floors in areas with high foot traffic in an attempt to eradicate COVID-19 from surfaces.



Clear signage is displayed on tables to reassure people that surfaces have been routinely cleaned.



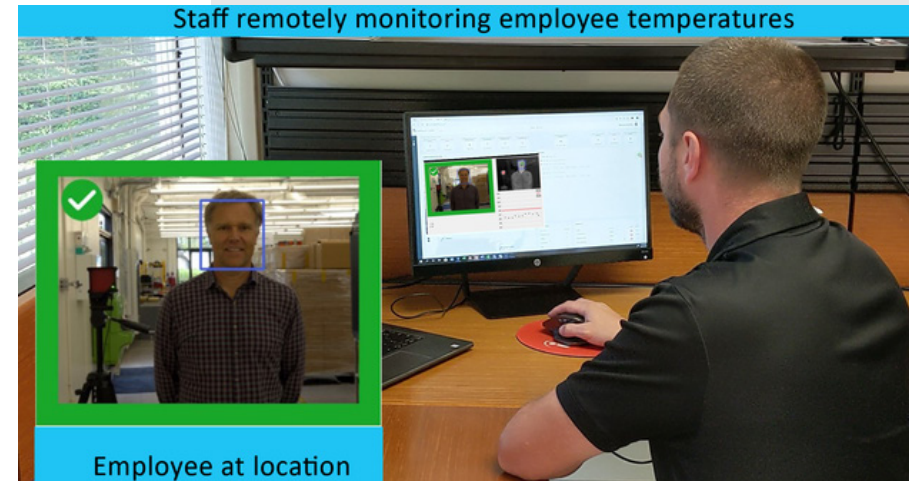
***C**leanTech has debuted a walk-through sanitizer for entry to high-traffic spaces. **N**ice-Crystal has developed a sanitizer mist that people can stand in front of before entering or leaving lounge spaces.*

INVISIBLE INSURANCE

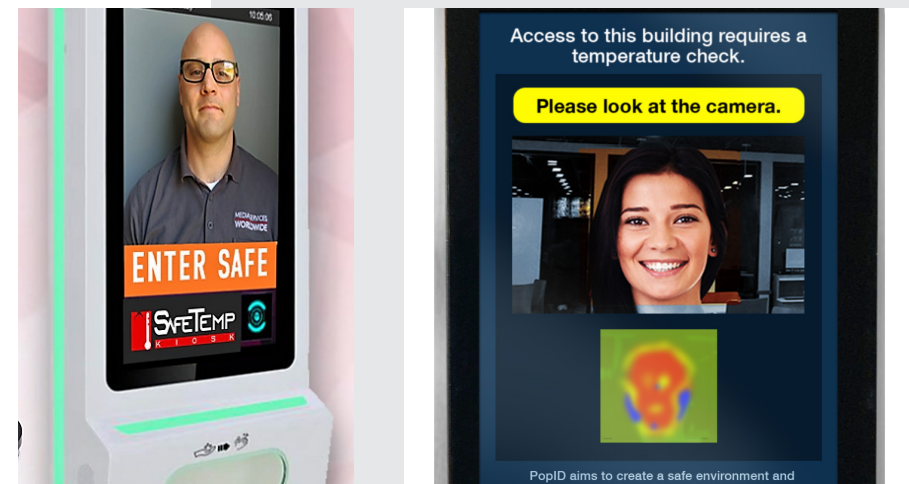
A concerted investment in behind-the-scenes solutions, systems, and infrastructures that create resilient environments

MANIFESTATIONS

- Smart buildings that enable automation
- Contactless interactions and payments
- Anti-microbial materials and finishes
- High-performing HVAC systems
- Camera and tracking technology
- Germ-killing lighting
- Self-cleaning mechanisms
- Required use of Contact Tracing apps



*Companies have begun display technology to allow security services to **remotely screen** the temperatures of everyone entering a building.*



*High traffic areas (like dining and lecture halls) and close-quarters meetings (like in-person advisory sessions) can require **voluntary temperature checks** prior to entry.*



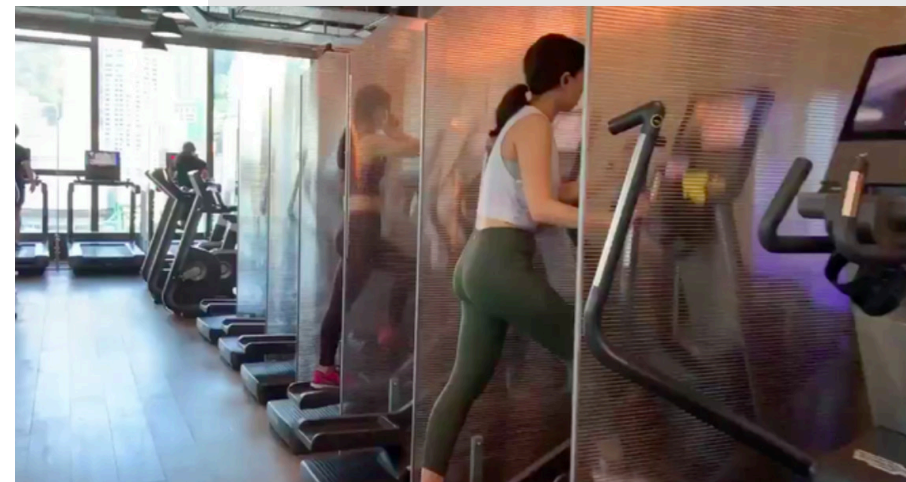
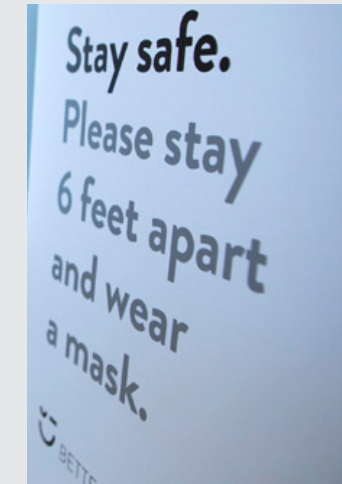
***Automated solutions** will infiltrate all public environments moving forward – from automatic doors to responsive shades.*

DECOMPRESSED DENSITY

Proactive management of personal space between students, faculty, and visitors

MANIFESTATIONS

- A short-term reevaluation of best practices for space planning
- Guided journeys
- Social distancing communication
- Less furniture, and clutter
- Tech-enabled solutions to detect proximity
- Evolution of established metrics beyond conventional baselines
- Students will use only every third seat
- Spaces arranged to ensure that instructors are a minimum of 6 feet from students
- Staggered dismissal of classes



*From floor graphics to integrated carpets, **visual cues** help to guide student journeys and maintain recommended social distancing.*

*Communal spaces, like gyms, will need to enact ways to **encourage wellness at a distance** - from partitions between machines to including more outdoor programming.*

***Ford** is experimenting in its manufacturing plants with wearables that vibrate when workers get too close to each other.*

CHOICE-DRIVEN INTERACTIONS

Empowering students to control and customize their surroundings or experience based on personal preferences

MANIFESTATIONS

- Allowing students to opt-in/out of activities, engagement, and experiences
- Enabling individuals to control temperature, space, and other environmental inputs
- Journey planning that enables self-navigation
- Tiered college and program solutions to provide guidance on how to evolve current environments
- Offering a portfolio of unique experiences to enable choice for users
- Modular course designs with flexibility for in-person, virtual, and hybrid learning styles



Providing options for students to engage as they wish will proliferate – from offering increased grab n go options to allowing students to choose modular/shifted class schedules. Students and faculty will have the ability to choose how they interact with their environments.



VR classrooms will allow educators to customize their environments to visualize the topics they're speaking to as well as bringing a more personal feel to the lesson over talking heads on a zoom call.



*The **TEAL (Technology Enabled Active Learning)** class format may see an uptick in higher education as the next generation prefers to learn by doing with the support of technology - versus one independent of the other.*

MEANINGFUL EXTENSIONS

Amplifying how institutions connect with their users beyond traditional environments and locations

MANIFESTATIONS

- Evolving offerings and services to maintain community and connection
- Elevating the “unboxing” experience for acceptance, orientation, and move-in moments
- Mobile relief programs to support communities and individuals
- Innovation in virtual collaboration and connection platforms

Life hack.
META Teletherapy

meta

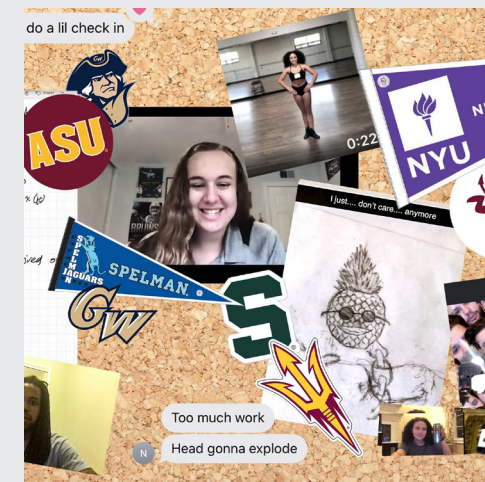


*Florida Technical College partnered with **meta** to offer increased access to mental health resources in the form of teletherapy.*



*University of Cincinnati launched **ThankView** as a way to connect current students and faculty with donors in a meaningful and impactful way.*

*They also initiated **Virtual Town Hall** meetings to connect with the community in more personal moments.*



Partnering with students and their families as they make “gap year” decisions will be important as colleges encourage students to return with a human connection.

EXTREME ACCESS

Elevating previously limited access to amenities as the expected, everyday normal

MANIFESTATIONS

- Initiating or elevating delivery
- Curbside pick-up services
- Walk-up or drive-thru activations
- Increased delivery of books, supplies, and resources
- Easy-drop returns
- Elevated role of facilities managers
- Designated spaces and zones for public vs. private
- Reservation systems paired with expanded hours of operations
- Increased availability of staff through new channels



*Retailers and restaurants are launching new services, like curbside pick-up and **beer delivery trucks**. Others are rethinking their tactics and safety protocols to ensure contactless or sanitary interactions.*

Dining halls will adopt carry-out models across a broader range of times and locations, mimicking the pivots in progress by restaurants and retailers. Solutions such as “Food Truck Days” or “express meals” incorporated into public locations may crop up as sites look to offer lower-risk alternatives to bustling dining and vending options.

Libraries, bookstores, and other services will see shifted hours and increases in both virtual technologies and requires reservations for study areas to enable access to all students while maintaining distance and sanitation.

RESPONSIVE RELEVANCE

Ensuring institutions and their corresponding offerings, experiences, and environments can evolve nimbly, quickly, and efficiently

MANIFESTATIONS

- Pivot to provide other products or services relevant to new need states
- Flex into adjacent offerings that blur category lines
- Convert and transform spaces for other purposes
- Cater the experience to specific audiences in need
- Reinvent real estate contracts and propositions



*Many colleges have adopted a **Virtual Orientation** model, supplementing an online course with one-on-one calls with RAs and Student Advisors.*

***Adoption of technology** has increased rapidly across higher ed with faculty learning new systems overnight. Students will continue to push for more resonant teaching methods.*

Universities will look to repurpose existing venues and dead spaces, such as converting parts of their parking garages into drive-in movie theaters as a way to monetize currently underutilized space while maintaining the theater amenity for students.



EXPANDED INFLUENCE

*Long-term shifts in attitudes, beliefs,
and values that will shape the future
of higher education sites*



#1

NEWFOUND CAMARADERIE

A shared sense of connection and solidarity among cities, states, countries, and everyone across the globe that is uplifting humanity - no matter what. As this feeling increases, the barriers will dissolve between institutions within the same city, let alone between historically siloed departments and colleges.

“For maybe the first time, we’re seeing biology departments helping history professors and vice versa”



#2

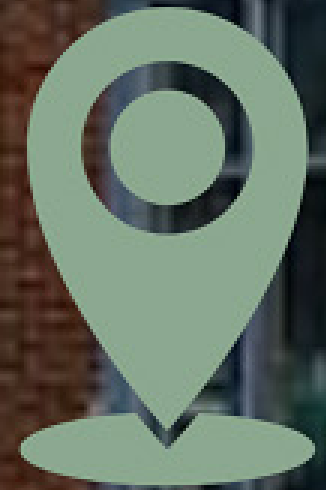
WIDESPREAD WELLNESS

Public health has never previously impacted the global economy to this extent, which will drive a collective pursuit to prioritize wellness as a central tenet to our lifestyles. The previous focus on health-driven amenities will only magnify, with a specific purpose to cater to a spectrum of emotional, physical and mental wellness needs. Dynamic, and truly functional, communal spaces will also be highly sought-out destinations for wellness.

\$10tn *The global healthcare industry is expected to exceed ten trillion dollars by 2022* (Deloitte)

PARK BUSINESSES

Keep it Local



#3

COMMITMENT TO COMMUNITY

A heightened appreciation for immediate proximities will continue to influence human behavior following COVID-19. Deepened emotional ties to local communities and businesses will shape an unprecedented demand for brands, programming and experiences with an authentic local or regional relevance. A shared sense of connection and solidarity with peers and neighbors will also dissolve perceived boundaries and amplify opportunities for partnerships and collective initiatives that uplift and support each other.

“The dial of aspiration has shifted from local to global to glocal and will now shift back to local.”



#4

REDEFINED ESSENTIALISM

Now is a time for renewed focus on what is essential to the college experience and how funding is shared across communities to drive value to students. As forward-thinking universities explore what is truly necessary for the ideal college experience they will come to realign their offerings to match the changing values and expectations of their students and faculty.

“Universities have to focus on what is unique to them, on what is core to their experience versus anywhere else”



#5

SOCIAL AMPLIFICATION

The social aspect of the college experience will remain central to the industry, especially for residential universities. As students have adapted to digital-format classes they'll seek to engage with the communal side of the college experience in new ways. Greek life recruitment, sporting events, and honorary fraternities will adapt to allow for socialization in choiceful settings - driving deeper connections in more meaningful avenues.

“Incoming freshman have been more focused on how they’re going to make new friends than adapting to remote learning”

APPENDIX OF IMAGE SOURCES

- Impact on Sectors
 - University of Cincinnati Website
 - Saint Francis College Facebook
 - Georgia Piedmont Technical College Facebook
 - Bucks College Website
- Impact on Core Components
 - Syracuse [Website](#)
 - NELSON, Avalon
 - Gwinnett Technical College
 - Trumn College Wellness [Center](#)
 - Bucknell University Housing
 - Georgia State University
- Seeing Clean
 - Pittsburgh International Airport
 - Nordstrom via [Retailwire](#)
 - CLeanTech via [Asia World-Expo](#)
 - Instagram User [@PaddyKu](#)
- Invisible Insurance
 - QSR [Web](#)
 - Safetemp Kiosk
 - Automatic Mall Doors via Medium
- Decompressed Density
 - Nordstrom via [RetailWire](#)
 - Oregon Live
 - Twitter user @Virginiaylau
 - Ford via Bloomberg
- Choice-Driven Interactions
 - Wegman's
 - Sephora
 - The Hustle.co
 - TEAL [Classroom](#)
- Meaningful Extensions
 - Florida Technical College
 - UCincinnati ThankView Video
 - Seattle [Chocolate](#)
 - [Slate](#)
- Extreme Access
 - Michael's
 - PetSmart
 - Madtree Brewing
 - Kroger/Walgreens via Supermarket [News](#)
 - Cornell University, Bissett Workstations
- Responsive Relevance
 - Virtual Orientation [Plan](#)
 - Florida FSD Distance [Learning](#)
 - Drive in theater
- Newfound Cameraderie
 - Minnesota State University, Mankato
- Widespread Wellness
 - Burwood Brickworks
- Commitment to Community
 - College Park City University Partnership
- Redefined Essentialism
 - University of Cincinnati Website
- Social Amplification
 - NY Magazine, [Intelligencer](#)

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LET'S TALK.

Looking for strategies, ideas, and solutions for your college or university post-COVID-19? Reach out to explore how we can partner to solve today and tomorrow's challenges.

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