

2020



TRENDS IN
HIGHER
EDUCATION

INTRODUCTION

The world of higher education today is far different than the one of even five years ago. Institutions have seen enormous shifts concerning the face of the student population, the support services they require, the most effective strategies to engage and recruit them, and more. In this state of flux, many institutions are pursuing innovative strategies to thrive amid uncertain funding and to provide the support students need most.

Institutions are seeing a new student population—more adult and non-traditional learners are pursuing degrees, increasing the demand for flexible education models. At the same time, institutions are contending with a decrease in international students and an increase in underrepresented students who require distinct support services to attract them to campus and keep them enrolled through graduation. In order to keep their institutions thriving and well-known to prospective students and donors alike, colleges and universities are increasingly experimenting with their financial models and marketing strategies, changing the ways in which they have traditionally operated.

The **2020 TRENDS IN HIGHER EDUCATION** report unpacks crucial shifts in higher education that are likely to affect most institutions—from domestic to international—and provides strategies to help them evolve. As they navigate these changes, institutions have the opportunity to establish themselves as leaders in higher education.



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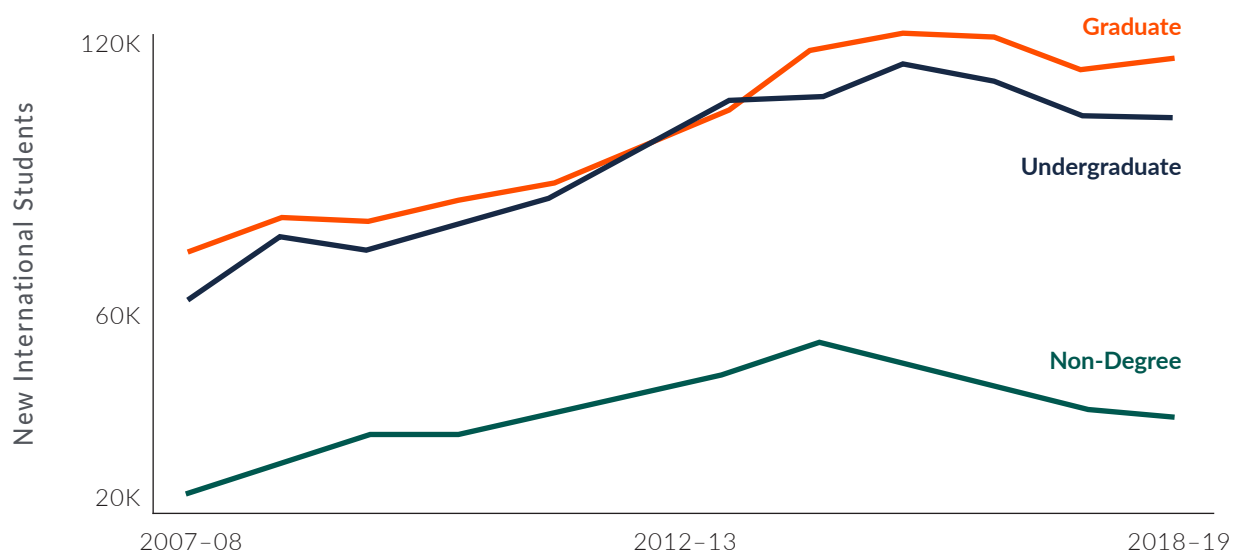
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NEW TUITION TACTICS REVITALIZE INTERNATIONAL STUDENT RECRUITMENT

After decades of steady growth, enrollments of new international students in U.S. institutions are declining. In 2018–19, 1,095,299 international students enrolled as first-time undergraduates, a decline of 9.5% from 2014–15. Non-United States markets are also seeing international enrollment decline or stagnation. The United Kingdom's international enrollment has stayed largely flat, only rising 4.1% between 2012–13 and 2016–17, while New Zealand has seen a substantial decline in international enrollments in the vocational and technical education sector.

While some attribute the United States' international student enrollment decline to the current administration's stricter immigration policies, others believe that **the primary factor is the heavy tuition that institutions force international students to pay**. International students paid on average \$26,290 for undergraduate tuition in 2018–19—a 42% increase from a decade before. International students often do not receive the same benefits afforded to American students, such as financial aid assistance, that could ease the burden of high tuition. To avoid missing out on the additional revenue that international students bring, institutions are considering lowering the underlying cost of education for international students.

INTERNATIONAL STUDENT ENROLLMENT IN THE UNITED STATES



HOW INSTITUTIONS ARE BOOSTING INTERNATIONAL ENROLLMENT



IN-STATE TUITION

Eastern Michigan University allows its international students to pay the same cost as in-state students.



BANDED TUITION

Purdue University-Fort Wayne lets international students pay a single tuition rate for a certain number of credits instead of a per-credit rate.



BLENDED TUITION

Southwest Minnesota State University offers both the banded and flat-rate in-state tuition models to international students.



PREPAID FLAT RATE

Minot State University allows international students to pay a flat rate that includes student fees, housing, food, and health insurance.



EXPEDITED VISA PROCESSING

Canada's Kwantlen Polytechnic University saw a 110% increase in international enrollments from 2017 to 2018 after introducing expedited visa processing for students from India.



POSTSTUDY WORK VISAS

Australia's two- to four-year poststudy work visas alleviate student concerns that they would be forced to leave the country after graduation or not be able to find employers willing to hire them due to visa concerns.

How Will Institutions Boost International Student Enrollment in 2020?

- 1. Conduct Outreach to New International Markets:** Institutions are increasingly pursuing diversification strategies in which they broaden recruitment outreach to emerging international markets. Countries with a rapidly expanding middle class or economy, such as Bangladesh and Ghana, are particularly promising. Additional emerging markets include Nepal and Kuwait.
- 2. Reduce Reliance on Oversaturated International Markets:** Many factors contributing to the decline in international student enrollment are out of institutions' control: Some foreign governments, such as Brazil and Saudi Arabia, have reduced scholarships that previously sent significant numbers of students to the United States, while China's efforts to improve its domestic university system have kept more students at home. Institutions are increasingly deprioritizing these oversaturated markets to save their efforts for markets that are more promising.
- 3. Provide Additional Visa and International Support Services:** While 60% of schools with declining international enrollment have cited social and political pressures in the United States as factors contributing to enrollment decline, the most frequently cited issue (by 83% of schools) is the visa application process or visa issues/delays. In response, institutions have established additional immigration-related legal services or student support services to help students navigate the process.
- 4. Foster Post-Study Work Opportunities:** Research has found a strong positive correlation between the availability of temporary post-study work opportunities and growth in international enrollment. Building relationships with employers that help streamline the path from graduation to a career may make institutions more attractive.
- 5. Develop Student Services That Acclimate International Students to Campus:** Offering support that focuses on the unique challenges international students face while studying in the United States—such as language barriers, culture shock, unfamiliarity with the American education system, and more—can help institutions develop a reputation for being particularly welcoming to students from abroad. For example, the University of Maryland-College Park's counseling center employs psychologists who speak a variety of languages, including Spanish, Mandarin, Cantonese, Hindi, and Gujarati, to make students feel understood and at ease.

TAKE ACTION

Attract more international students by offering non-traditional tuition models, such as in-state, banded, or blended tuition or a prepaid flat rate.

NON-TRADITIONAL ACADEMIC PROGRAMS PREPARE STUDENTS FOR THE WORKFORCE

With more students frustrated by the cost and time requirements of traditional degree programs, institutions are increasingly investing in strategies to identify and serve non-traditional undergraduate students. Such students can include adult learners, individuals with dependents, students attending classes part-time, or financially independent students. Higher education providers are developing offerings that present alternative education delivery models to appeal to these students' unique responsibilities and academic goals. For example, universities may emphasize workplace skills through experiential learning opportunities and offer microcredentials that allow students to build the skills they need while avoiding the higher cost and time commitment of a full degree.

EXAMPLES OF NON-TRADITIONAL PROGRAMS*

**Hanover Research-evaluated programs in 2019*



BACHELOR'S COMPLETION PROGRAMS/ADULT BACHELOR'S PROGRAMS

- Business Administration
- Liberal Arts
- Robotics Technology
- Information Technology and Systems
- Interior Architecture



NON-CREDIT CERTIFICATES

- Hospitality Leadership
- Urban Environments
- Data Analytics
- Sustainability



MID-CAREER TRAINING

- Global Humanitarianism
- Business Leadership
- Public Speaking



STACKABLE CREDENTIALS

- Applied Science
- Hospitality & Tourism Management
- System Administration



DIGITAL BADGES

- Certified Gardener
- Advanced Excel
- Visual Design
- Medical Terminology
- Library Research



MICROCREDENTIALS

- Information Literacy
- Child Advocacy
- Digital Composition
- Scientific Communication

HOW COMMUNITY COLLEGES MEET NON-TRADITIONAL LEARNERS' NEEDS

Community colleges are popular choices for non-traditional students—in Spring 2019, 5.1 million students enrolled in public, two-year colleges. Community colleges' career and technical education (CTE) programming drives students to attend, especially since the passing of Perkins V in 2018, which provides funding that allows colleges to expand these programs. To meet the needs of these unique students, community colleges are increasingly engaging in the following practices:



DUAL ENROLLMENT

- Provides a pathway to a bachelor's degree by allowing students to earn college credits while still in high school, minimizing the time to completion
- Allows students to receive less-expensive postsecondary education, as many institutions offer scholarships for dual enrollment students
- Improves students' college readiness and allows them to explore career options



LABOR MARKET ALIGNMENT

- Enables students to receive Career and Technical Education that meets local economic priorities, boosting their chances of securing a job after graduation
- Informs academic programs so students graduate with the skills they need to apply for highly compensated and in-demand occupations



GUIDED PATHWAYS

- Offers students the opportunity to choose a degree program and develop an academic plan early, plotting a road map of the courses they need to take to earn a credential



COLLEGE-EMPLOYER PARTNERSHIPS

- Inform educational training and curriculum development so students gain experience based on real jobs
- Provide opportunities for students to interact directly with employers via internships, guest lectures, or networking events
- Allow employers to have more access to qualified applicants, with less need to provide on-the-job training

What Will Non-Traditional Academic Programs Look Like in 2020?

- 1. Pursue Minimum Viable Product Program Development:** These programs focus on employment skills and are financed by income share agreements. Many include guaranteed employment, apprenticeships (physical and digital), and placement programs. Institutions first train students in the cognitive and non-cognitive skills needed for entry-level positions, then focus on building practical technical skills, and finally help students find employment.
- 2. Invest in Career and Technical Programs:** CTE programs are designed to prepare students for their future careers, often with hands-on vocational training. Many institutions are investing in high-quality CTE programs that can improve student engagement, graduation rates, and postsecondary earning potential. While considering CTE programs, institutions should analyze employment projections and conduct wage analyses to position graduates to secure jobs.
- 3. Emphasize Competency-Based Degrees and Education:** A 2019 survey suggests that 74% of institutions are in the process of adopting or are interested in adopting competency-based education programs. Competency-based education may be a better fit for adult learners, who may be more interested in directly learning practical skills that have a direct application to the workforce. Via competency testing, students progress through courses at their own pace, and then demonstrate their proficiency.
- 4. Consider Achievement Tracking Instead of Credit Hours:** Rather than relying on credit hours, institutions track achievements to focus on whether students have actually learned the material. Movements like the Association of American Colleges & Universities' Valid Assessment of Learning in Undergraduate Education aim to deepen institutions' ability to describe and measure proficiency in academic performance. Institutions incorporating achievement tracking set fixed learning outcomes and note if students are on track with their learning.
- 5. Offer Microcredentials in Focused Subject Areas:** Microcredentials offer an opportunity for skill specialization and address a movement among employers to emphasize skills instead of formal degree attainment. These credentials typically consist of two to four college courses in a particular field. In 2017, 26% of institutions offered microcredentials, an increase from 13% in 2016.
- 6. Provide Work Experience Via Experiential Learning Opportunities:** Non-traditional students can benefit from work programs that allow them to gain experience remotely, achieving their goals while reducing the time commitment. Northeastern University's Experiential Network allows students to remotely complete real projects for corporate sponsors, providing real-world experience for students unable to commit to an internship or traditional experiential learning opportunities.

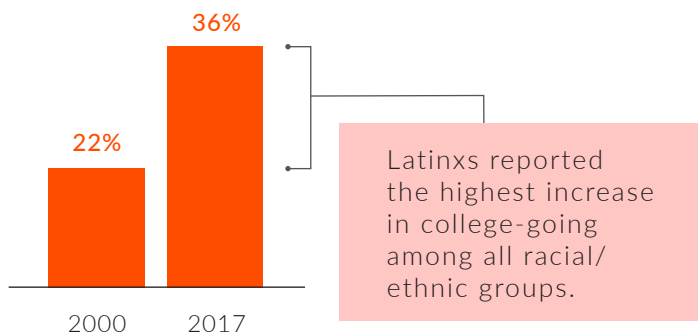
TAKE ACTION

Prepare students for the workforce by considering non-traditional academic programs, like microcredentials and competency-based education.

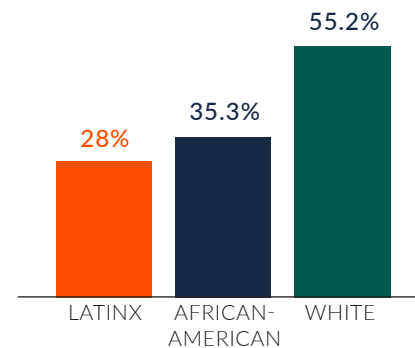
STUDENT DIVERSITY SERVICES SUPPORT THE RISE OF UNDERREPRESENTED STUDENTS

Higher education campuses are increasingly diverse, hosting students from vastly different cultural and socioeconomic backgrounds. Now, students of color comprise more than 45% of undergraduates, compared with less than 30% in 1996. Similarly, nearly one-third of all students are the first in their family to attend a higher education institution. Because these students face unique challenges in higher education, many institutions now provide services specifically tailored to help them succeed. As these students become more prominent on college campuses, higher education providers that are better equipped to address their needs will have an advantage in recruiting from traditionally under-tapped populations. To help underrepresented students find a home on campus, institutions are pursuing initiatives that help these students succeed academically and socially.

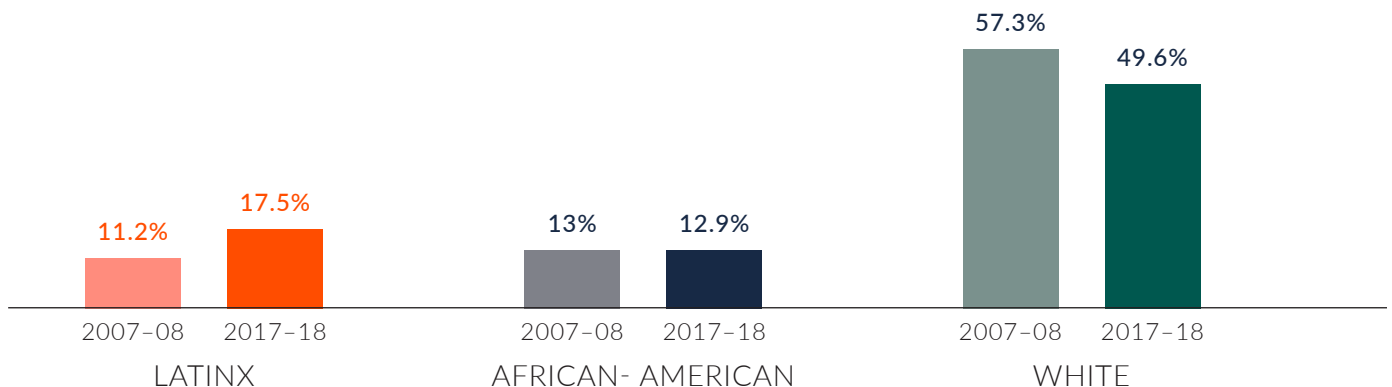
RISE IN ENROLLMENT RATES FOR LATINX STUDENTS

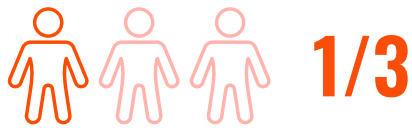


BACHELOR'S DEGREE HOLDERS AMONG ADULTS AGED 25-34 IN 2017



ENROLLMENT IN POSTSECONDARY INSTITUTIONS IN 2017-2018 COMPARED WITH 2007-2008





1/3

Nearly one-third of first-generation students drop out within three years compared to 14% of their peers whose parents hold a degree



31%

Students who received a Pell Grant in the 2018-19 academic year



36%

Higher education students who may be housing insecure



9%

Students who are homeless while attending a higher education institution

How Will Institutions Support Underrepresented Students in 2020?

- 1. Engage Parents in Students' Education:** By involving parents in their children's higher education, institutions aim to increase first-generation and underrepresented student retention. For example, Elizabethtown College in Pennsylvania developed a 7-week interactive online video course for parents of freshmen, which covers the daily facets of campus life and how to interact with their children about common higher education challenges.
- 2. Help Students Meet Basic Financial Needs:** Approximately 39% of undergraduates live below 130% of the federal poverty line. Institutions are developing services that help students meet their basic needs so that they can focus more on academics. For example, over 640 institutions now operate food pantries on campus.
- 3. Conduct Proactive Outreach to Underperforming Students:** Rather than expecting students to access campus resources on their own, institutions can track student performance and take the initiative in reaching out when students face challenges. Georgia State University's "GPS Advising" system monitors student performance and notifies counselors if a student appears to be in trouble. As a result, Georgia State has turned itself into a leader among United States institutions for generating high academic achievement by populations that have often struggled at large, predominantly white institutions: this includes African-American students, lower-income students, and first-generation students.
- 4. Incorporate Peer Mentors Into the Support Process:** Effective peer mentors can help underrepresented students transition to college life and develop necessary academic and life skills. For example, Dickinson College's new peer mentoring program is designed specifically for underrepresented students and integrates them into social events, while teaching them skills such as how to ask professors for help.
- 5. Support and Hire Faculty of Color:** Prior studies have demonstrated that the number of faculty of color on campus is associated with increased persistence among students of color. Faculty from diverse backgrounds help facilitate a culture of inclusion on campus, develop curriculum with a greater diversity of topics, and serve as effective mentors for underrepresented students.

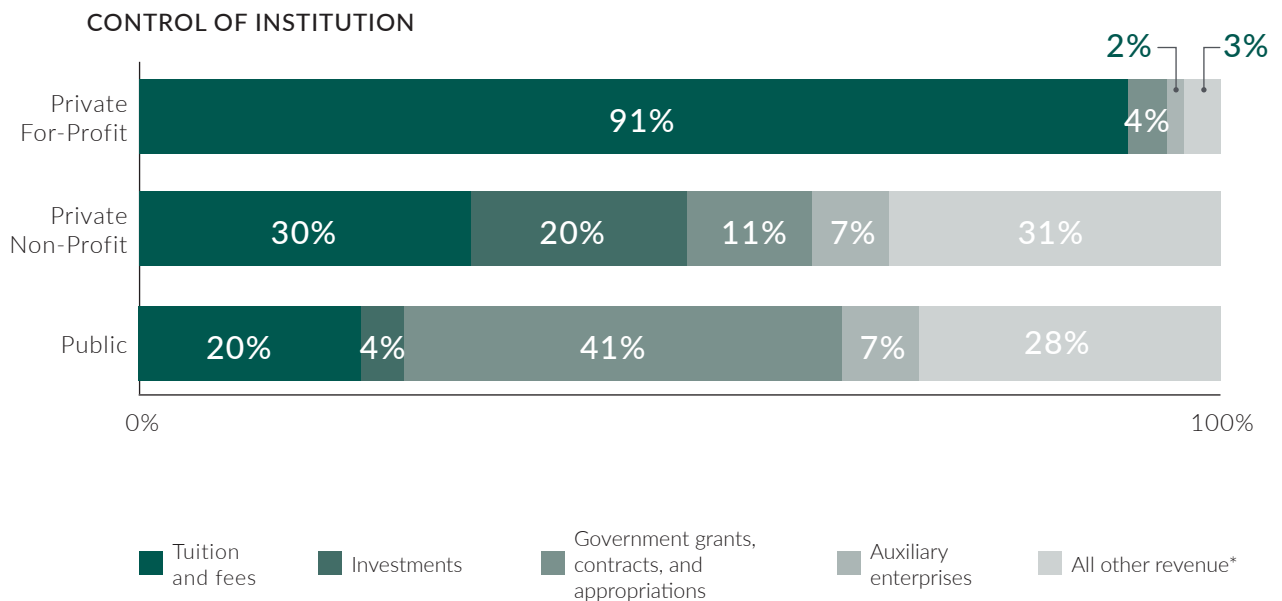
TAKE ACTION

Support underrepresented students by providing the services they need most, like financial support, proactive outreach, and peer mentors.

REVENUE DIVERSIFICATION EMERGES AS ESSENTIAL TO FINANCIAL SURVIVAL

Institutions face continued financial pressure and government budget cuts, with concerns that state funding may never return to pre-Recession levels. At the same time, the costs of providing higher education continue to increase. As a result, more institutions are seeking innovative ways to gain control of their budgets—particularly through new, diverse ways of generating revenue. Through revenue diversification, struggling institutions can realize early gains to drive funding and strengthen their financial health. To maintain stability, institutions should aim to develop strategies that support revenue growth of at least 3%, while ensuring that revenues remain above expenses.

TOTAL REVENUE DISTRIBUTION AT DEGREE-GRANTING POST-SECONDARY INSTITUTIONS: 2016-17



* May include institutions' non-traditional revenue sources, such as renting their facilities, partnering with external businesses, and developing innovative academic programs.



Institutions that will likely have experienced declines of more than 3% in cash and investment levels in FY 2019



Number of small colleges that may be forced to close each year by 2019-2020. Those that are most susceptible to closure are those with fewer than 1,000 students



Institutions projected to have experienced a decline in net tuition revenue per student in 2019



Increase in the development of degree or certificate programs since 2012, reaching a total of 41,446

How are Institutions Diversifying Revenue Sources in 2020?

- 1. Develop Innovative Academic Programs:** Institutions can boost revenue through non-traditional sources by developing executive education programs, non-degree executive education, corporate executive education, professional development, vocational education, and summer school programs.
- 2. Expand Research and Innovation Opportunities:** Institutions can take advantage of the human capital on campus, fostering entrepreneurship, monetizing patents, commercializing intellectual property, and developing incubators connected to specific industries. For example, The University of Michigan established its Business Engagement Center (BEC) in 2007 as a pathway for faculty to work with business leaders on mutually beneficial projects in a wide range of fields. A decade later, the university received \$142.8 million in corporate investment and has enjoyed a 321% increase in research awards.
- 3. Find Non-Traditional Uses for Campus Resources:** Institutions are finding ways to utilize resources that extend beyond traditional academics. They can rent their premises as sports facilities, offer memberships to the library, or provide dining and other lifestyle services. The University of Chicago not only rents its premises, but also assists in event planning, forming business relationships with event management companies to help the university source clients.
- 4. Pursue Unique External Partnerships:** External partnerships can help universities receive more support from business and industry, while also furthering their educational missions. A partnership between Walmart and several different institutions (including the University of Florida, Brandman University, and Bellevue University) helps Walmart to train its employees while also providing these universities with additional students and furthering their reputation and expertise in serving working adults.
- 5. Restructure Budgeting Strategies:** Institutions can delegate budgeting responsibilities to individual units on campus to increase accountability and efficiency of resource allocation. Oregon State University implemented a new "Shared Responsibility" budget model in FY2018, with budget allocations tied to student credit hours, degrees, and research, while also leaving room for "cross-unit collaboration" and shared discussions of revenue generation.

TAKE ACTION

Stabilize your budget by considering revenue diversification options like developing innovative academic programs and pursuing external partnerships.

HYPER-PERSONALIZATION INCREASES DONATION VALUE, AMOUNT, AND FREQUENCY

Amid budget constraints and funding uncertainty, it is vital for advancement offices to enhance alumni communications to boost donations for their institutions. On average, only 11.1% of alumni at ranked universities donate to their alma maters. However, the top ten leading institutions in alumni giving boast rates of over 40%, suggesting that many institutions have room to improve their alumni engagement. While the overall level of donations have remained stable, the number of individual donors to institutions is declining. Institutions must therefore innovate their outreach approaches, with many doing so by creating personalized and segmented campaigns to increase engagement among alumni.

TIPS FOR INCREASING ALUMNI ENGAGEMENT

1. Focus on relational rather than transactional interactions.
2. Tailor your outreach for different types of alumni, like new graduates with fewer funds.
3. Include a clear call to action.
4. Emphasize how alumni benefit from giving, not what the institution needs.
5. Provide periodic updates about institutional news to maintain alumni's sense of connection.
6. Ask alumni to submit industry blog posts, career advice, or other content.



85%

Alumni professionals who believe their organization does a poor job or needs to do more to attract and engage young alumni



56%

Donors who would be repeat givers if they received personalized messages



8%

Alumni donors who made a gift during a “giving day” in 2017, up from 3% in 2013

How Will Institutions Personalize Alumni Engagement in 2020?

- 1. Identify Their Audiences’ Interests:** Some institutions are relying on technology to help them better connect with alumni. MIT analyzed social media data to determine the content with which non-donors engaged, following it up with a targeted digital micro-campaign for the topic that resonated most with them—robotics. Texas Christian University and UCLA both ensure prospective donors receive communications that speak to their interests by asking campus partners to send personalized emails and by revamping the website to spotlight causes.
- 2. Focus on User Microbehaviors:** The tiny actions that people take online—e.g., opening an email or clicking through to a webpage—can have an outsized role in segmentation strategies. The University of Miami used open rate data to target follow-up to donors who clicked on the first of a series of emails, and Dickinson College sends follow-ups within 48 hours to prospective donors who visited their giving page without giving.
- 3. Segment Alumni During Outreach:** Institutions may find greater success in grouping alumni by class year, academic major, and similar characteristics, creating a unique outreach strategy that appeals to each group. For example, institutions can solicit small, recurring donations of even \$5 a month from young alumni, who may still need to pay off student loans and likely cannot afford larger contributions.
- 4. Promote Collaboration with Student Affairs:** Institutions increasingly integrate alumni into student life from the first moment that freshmen arrive on campus, with alumni becoming a part of orientation, career exploration activities, and senior events. Doing so helps students feel connected to a network beyond the institution, and can help students understand the value of giving back by the time they graduate.
- 5. Adopt Marketing Automation to Increase Efficiency:** Automation helps institutions streamline marketing tasks and workflows, allowing advancement officers to focus more on each engagement activity. Automation can include personalization based on interests, microbehaviors, demographics, and preferred channels. Institutions like the University of Washington employ digital marketing automation managers to develop and employ email and marketing best practices.

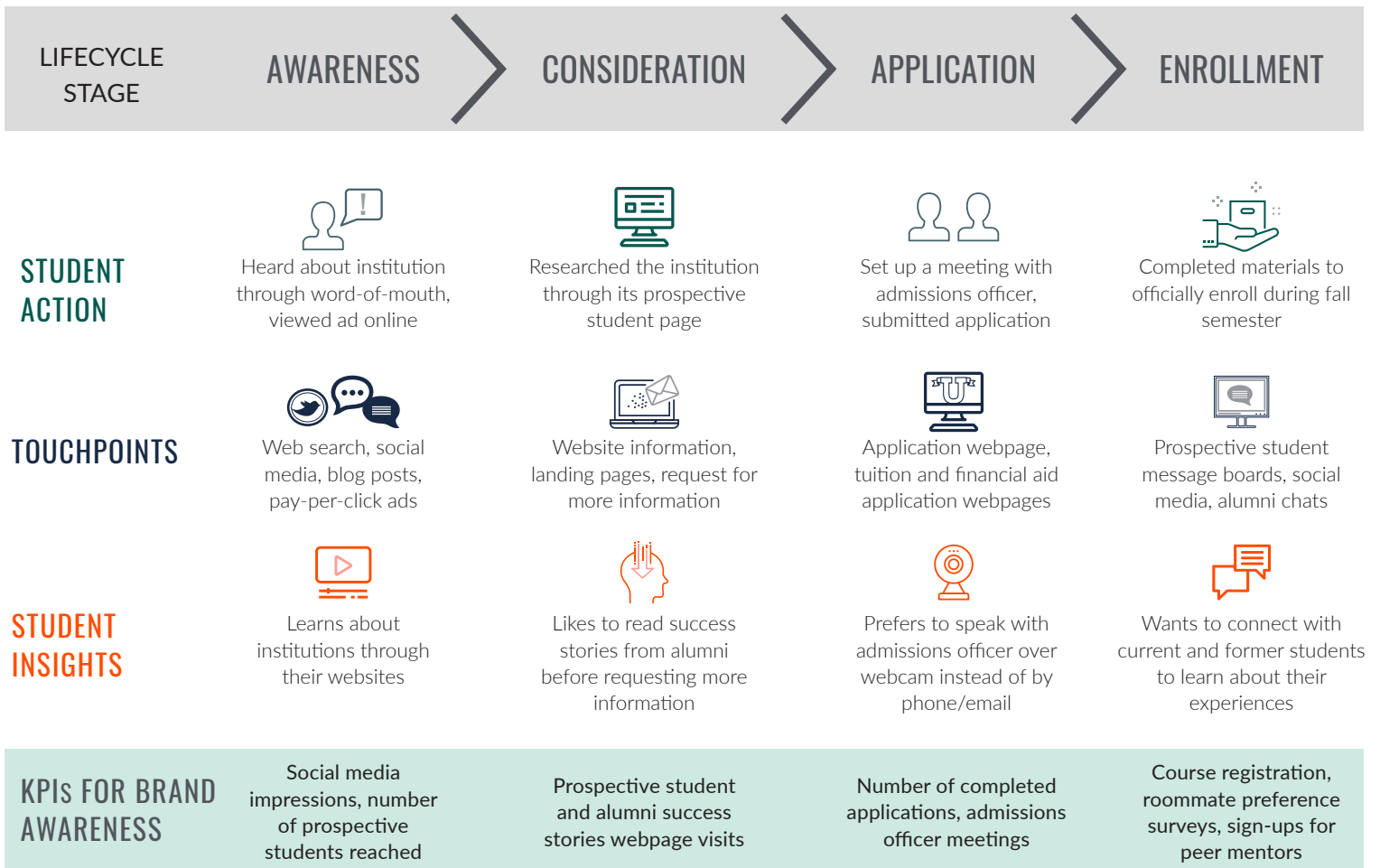
TAKE ACTION

Increase donation value, amount, and frequency by hyper-personalizing alumni communications, such as by audience interests, microbehaviors, or class year.

BRAND AWARENESS STRATEGIES BOOST INSTITUTIONAL REPUTATION

In a competitive, saturated market, institutions that rely on traditional marketing tactics risk getting lost in the crowd. Technology and media platforms are constantly shifting in this digital age, providing institutions with the perfect opportunity to experiment with what sticks with students and to separate themselves from the pack. Strategies such as inbound marketing, social media analytics, and new digital technologies can also help institutions track the unique journey each student takes when determining which institution to attend. By mapping the student journey, institutions can determine which marketing strategies will be most effective in raising brand awareness at each stage, making marketing efforts more efficient and effective.

EXAMPLE STUDENT DECISION JOURNEY MAP





\$2,357

Cost of recruiting a single undergraduate student at a private institution



17%

Prospective students who believe institutional reputation is an important factor in deciding where to apply



40%

Students who feel passively about the institutions they attend, signaling a need for institutions to improve their brand image



1/4

Students who rejected offers of admission because the institution they currently attend is more highly ranked, suggesting a concern with reputation and brand image

How Will Institutions Boost Their Brand Awareness in 2020?

- 1. Leverage Inbound Marketing:** Inbound marketing allows institutions to connect with prospective students, no matter where they are in their application journey. By studying what matters most to these students, institutions can create content for their websites or blogs that generates authority and can be shared to further amplify the institution's brand.
- 2. Incorporate Analytics into Social Media Strategy:** Institutions are committing to social media marketing by using analytics to evaluate the best channels to reach their audience. While tracking social media ROI can be difficult, moving beyond the simple tracking of likes and followers can help institutions better understand how to tie social media strategy back to their overarching brand awareness goals. The University of Georgia conducts a platform analysis of each of its social media accounts, even tracking the extent to which its self-designed GIFs have been used.
- 3. Emphasize Digital Marketing Over Traditional Marketing:** Institutions are increasingly allocating more of their marketing budgets to digital marketing strategies to meet students where they are—online. A 2018 survey indicated that 71% of private institutions and 61% of public institutions planned to increase their digital marketing budget over the next 12-14 months. In addition, 14% of private institutions and 23% of public institutions planned to reduce spending on traditional marketing.
- 4. Prove the Value They Provide:** Institutions are demonstrating the quality education they provide by highlighting alumni success stories backed with data and facts. Concrete statistics showing a high number of applications, quality of professors, and placement of graduates all help to build a reputable brand. Institutions are also showcasing involvement in the community—brands are community-driven, making this crucial to display reputability.
- 5. Pursue Innovative Digital Technologies:** Cutting-edge technologies, such as augmented reality, can impress prospective students while allowing them to learn more about a particular institution. American University has partnered with Sony to develop an augmented reality app that includes 360-degree videos and comments from current students.

TAKE ACTION

Stand out from your competitors by adopting brand awareness strategies like showcasing alumni success stories and emphasizing digital marketing.

SOURCE LIST

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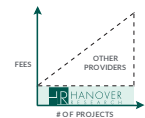
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