

# 2021 TRENDS IN HIGHER EDUCATION



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# INTRODUCTION

The COVID-19 pandemic, the economic recession it spawned, and a heightened focus on racial equity, have upended nearly every aspect of higher education. These events have forced institutions to reconsider their financial sustainability; rethink how they market themselves; and reimagine how they recruit, admit, retain, and educate students. While some changes will be temporary, others will likely become permanent as higher education adapts to diversifying demographics and changing consumer demands.

Over the next decade, the number of high school graduates is expected to decline, making the competition for traditional-aged students even more intense than it already is. At the same time, the number of adults returning to college to upskill is expected to increase. State spending on higher education, which still has not fully recovered from the last recession, is expected to fall again. This will make the balancing act between affordability and financial sustainability even trickier.

Amid this shifting landscape, institutions must be prepared to try new enrollment tactics, to focus their program offerings, and to update their strategic plans. They will need to seek new sources of revenue, examine new enrollment and retention models, and evolve their marketing strategies.

As colleges and universities put the pandemic behind them in 2021, they will need to look ahead. Now, more than ever, college leaders must make difficult decisions based on changed circumstances.



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# 2021 HIGHER EDUCATION TRENDS

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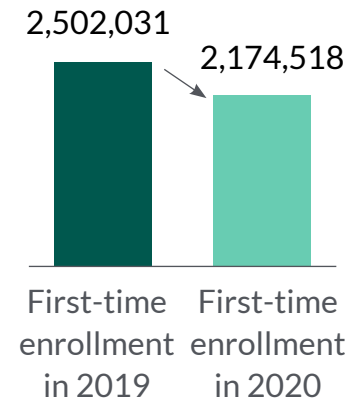
# ENROLLMENT STRATEGIES WILL BECOME MORE RESILIENT

The pandemic has had a major impact on college enrollments, with half a million fewer undergraduates enrolled in college than last year. Much of that loss has occurred at community colleges and among students of color. Two-year college enrollments, which spiked during the Great Recession, are down by more than 10%.

International student enrollments have also declined, both in the United States and abroad, with many students staying home due to fear of the virus and visa difficulties. Their absence is having an outsized impact on higher education budgets; though international students account for just 6% of enrollment in a typical year, they often pay higher out-of-state rates and do not receive financial aid.

Looking ahead, institutions will find themselves competing for a shrinking number of traditional-aged students. After peaking in 2025, the number of high school graduates in the United States is expected to decline, with senior classes becoming smaller and more diverse. Institutions in the United States will also face increased competition from international colleges seeking to grow their own international enrollments.

Taken together, these trends mean that colleges will have to identify new ways to attract students, particularly students of color.



**13%**  
Drop in enrollment  
in 2020-2021



**43%**  
Decline in new  
international student  
enrollment

Enrollment Declines Across Races/Ethnicities	
Asian	-3.1%
Hispanic	-5.4%
White	-6.6%
Black	-7.5%
Native American	-9.6%

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# Best Practices in Developing Resilient Enrollment Strategies

## Smooth Transfer Pathways

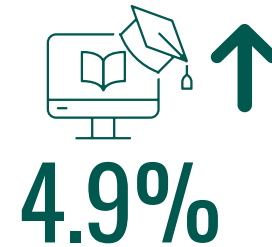
As the pandemic and the ensuing recession leave their mark on the higher education landscape, more institutions must rely on each other to survive. Collaboration on transfer student agreements can enhance the volume and predictability of enrollments across four-year and two-year institutions. These agreements also benefit students by establishing transparent degree pathways.

## Consider Going Test-Optional

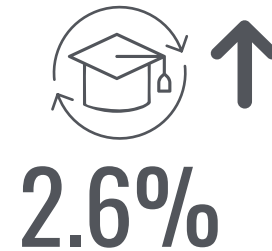
With last-minute cancellations and registration difficulties at test centers amid the pandemic, many institutions temporarily implemented a test-optional or test-blind policy. This trend extends a practice that had been growing prior to the pandemic, with higher education administrators citing equity concerns across racial/ethnic and socioeconomic groups. Adopting test-optional policies can help institutions foster diversity on campus without compromising the academic quality of their student body.

## Take a Counseling Approach to International Recruitment

With a pandemic raging worldwide, and international flights limited, most international student recruitment has moved online. Though this shift has helped some recruiters reach more students, it has also made it harder for institutions to differentiate themselves from the competition. For institutions in the United States, recruiters will need to spend more time building one-on-one relationships with individual students while helping them navigate the complexities of the new student journey.



Increased enrollment at primarily online institutions at the undergraduate level



Increase in transfers from two-year to four-year institutions

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# ACADEMIC PORTFOLIOS WILL ADAPT TO NEW DEMANDS

As cash-strapped states scale back their spending on higher education, budget cuts are expected to continue into 2021. To reduce spending and increase revenue, institutions will need to become more strategic in their offerings, ensuring that their programs are aligned with current and projected local and regional workforce needs. Higher education providers must prioritize academic portfolio optimization.

With students unable to access the traditional services and amenities of the on-campus experience, greater attention is called to the academic offerings available for them to pursue. Student interest in short-term programs is blossoming, as out-of-work adults seek quick

ways to upskill. Massive open online course (MOOC) providers like Coursera and EdX have signed up millions of new users in the United States and abroad, while coding bootcamps like General Assembly are experiencing a spike in web traffic. Students are also gravitating to health-related fields, as the pandemic shines a spotlight on health care workers. Above all, students are seeking programs that feel relevant and offer a clear path to a career. Applications to medical school were up 17% as of the end of October 2020. According to education consultant Steve Goodman, leading business schools are seeing a 20% growth in applications, while law schools are seeing a 30% jump.



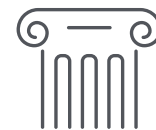
**17%**

Increase in medical school applications



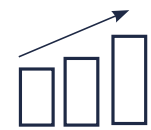
**1 in 5**

Prospective students who decided to change academic programs in 2020



**30%**

Increase in law school applications



**20%**

Increase in applications among leading business schools

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# Best Practices for Institutions Looking to Re-Focus Their Program Offerings

## Reassess Your Strategic Plan

COVID-19 has compelled many college presidents to make changes to their business models, programming, or other operations. This realignment must continue into the future, as institutions tweak their financial models, conduct contingency planning, and evaluate new partnerships. While the pandemic has presented many challenges, institutions can use it as an opportunity to innovate. Those that do so may emerge from the pandemic stronger than before, even as others struggle to rebound.

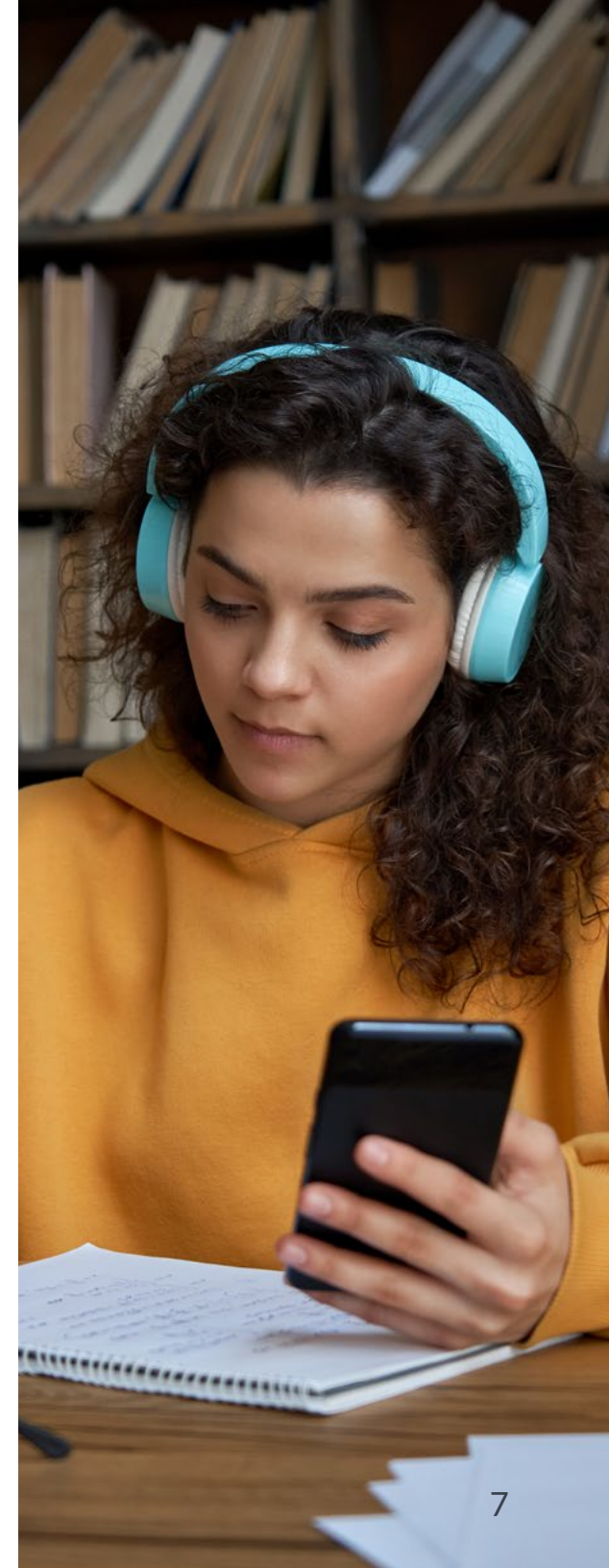
## Develop New Short-Term Programs

Individuals who have lost jobs in the pandemic are looking for short-term programs that will boost their resumes and get them back to work quickly. They also want flexible programs that allow them to learn anywhere, at any time. To meet these demands, institutions should continue to build their online capabilities while adding new nondegree programs, such as micro-credentials - stackable credentials that can build over time to a bachelor's or master's degree.

Going forward, these new programs may attract not only unemployed adults, but also younger students and their parents, who are increasingly concerned about the cost of college.

**“Demand is high for self-paced, skills-based, interactive programs that are shorter and more affordable than full degrees.”**

*W. Brooke Elliot,  
Associate Dean of Online Programs at the  
University of Illinois at Urbana-Champaign*



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# INVESTMENTS IN DIVERSITY, EQUITY, AND INCLUSION WILL DRIVE STUDENT SUCCESS

Higher education in the United States has long grappled with inequities in access, completion, and hiring. Students of color are enrolling and graduating from college at historically high rates, but they remain underrepresented at many public institutions, and achievement gaps between white students and students of color persist. At the same time, faculty diversity has not kept pace with changing student demographics.

In 2017, roughly three-quarters of college faculty were white, compared to just over half of students. Forecasts show that students of color will make up a growing share of high school graduates over the coming decade. Their success – or failure – in higher education will be closely tied to institutional

success. Recognizing this link, institutions have increased their spending on diversity, equity, and inclusion efforts over the past five years by 27%. However, DEI initiatives still account for only half a percent of university-wide budgets, suggesting institutions have room to grow.

As part of this effort, colleges and universities must address the disproportionate toll that the pandemic has taken on the mental health and well-being of students and faculty of color. Demand for counseling services was skyrocketing even before the pandemic and is only expected to grow in the years to come.



**27% ↑**

Institutions have increased their spending on diversity, equity and inclusion efforts by 27% in the past five years



**3/4**

The proportion of white faculty members in 2017, compared to just over half of students



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# Best Practices in Improving and Implementing DEI Initiatives

## Invest in Data Collection and Assessment

Robust data collection and assessment is essential to developing a sustainable DEI initiative, and helps institutions measure success while providing accountability and transparency to stakeholders.

Data collection can also help institutions identify areas for improvement. At the University of Kentucky, for example, administrators conducted a facilities audit to determine how to foster a more diverse and inclusive atmosphere – including through the use of art.

## Collaborate with Business and Community-Based Partners

Working with community-based organizations and business groups helps institutions build their pipelines of underrepresented students. Such partnerships can provide local businesses with a diverse pool of potential employees, increase access to college among underrepresented high school students, and deliver counseling, financial assistance and other community support services beyond what an institution itself offers.

## Grow Your Counseling Capacity

In recent years, many institutions have added counselors and invested in mental-health digital apps to reach more students, more quickly. They have expanded group counseling and added workshops on wellness and resiliency, but in the coming year they must invest even more to meet the needs of students who are struggling with grief, fear, and anxiety stemming from the pandemic and racial tensions across the country.



## CASE STUDY

Cuyahoga Community College

In 2020, **Cuyahoga Community College**, also known as Tri-C, received the Higher Education [Excellence in Diversity Award](#) for a seventh consecutive year. Tri-C is a [diverse institution](#): nearly half of its students and a third of its faculty are BIPOC.

Several campus groups exist to support students of color, including the Black American Council, which provides mentoring for 400 minority students. More than 90% of mentees graduate college.

Other campus groups include the Hispanic Council, which provides bilingual assistance to current students while also reaching out to local students to help them explore potential careers; the Veterans Initiative; the Sexual Orientation and General Equality Council; and the Women in Transition program.

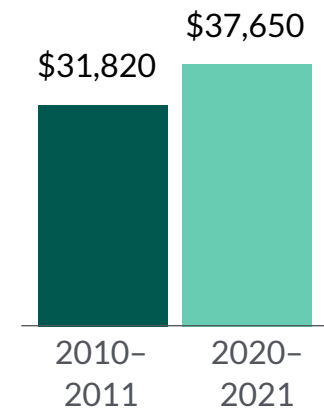
The institution also has an Equity and Inclusion Task Force, which looks for ways to support students while reviewing internal policies and practices in key areas including purchasing, hiring and recruitment, professional development, and campus climate.

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# STUDENT AFFORDABILITY WILL BE BALANCED AGAINST FINANCIAL STABILITY

In setting tuition and discount rates, institutions aim for the optimal price point that will maximize yield while covering operating costs. It is a tricky proposition in normal times, but during the pandemic, the balancing act has become even more difficult. The economic downturn has made it harder for families to afford college, and a growing number are asking for additional aid. Others are demanding discounts, arguing that they should not have to pay for campus amenities when they are learning from home. In one recent survey, 84% of respondents said that rising student debt levels made them “worry that higher education is not worth it,” turning the pressure on for institutions to right-size tuition or risk drops in enrollment.

There will be an added complication that financial aid packages for the upcoming 2021-22 academic year will be based on 2019 income tax returns, a period when many families were not yet experiencing the economic hardships that were brought on by the pandemic. Students will have to appeal unsatisfactory financial aid offers, introducing an additional hurdle to the enrollment process. As institutions grapple with fiscal uncertainty that will likely persist for months, they will need to find new ways to right-size tuition.



The Average Published Tuition and Fees at Private Nonprofit Four-Year Colleges



**84%**

The proportion of respondents that said rising student debt levels made them worry that higher education is not worth the cost

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# Best Practices for Identifying an Optimal Price Point

## Work Collaboratively With External Stakeholders to Establish an Optimal Price Point

While some institutions cut tuition in immediate response to the pandemic, others had long been considering bringing their sticker price in line with what families actually pay after discounts. In any scenario, such “tuition resets” carry risks: consumers often associate cost with quality, so a reset may make an institution less appealing to some families. Colleges and universities that have succeeded with resets have engaged deeply with key stakeholder groups (including prospective students, current students, and parents) to understand how different price points affect their perceptions of the institutions.

## Communicate the Reasons for the Reset

Flawless communication is necessary for a successful tuition reset, and it is critical that such an initiative is not perceived as a last-ditch effort to attract greater enrollments. Clear lines must be drawn between a tuition reset and an institution’s ultimate goals, which often include enhanced affordability and accessibility. Notably, institutions that have most successfully adjusted their tuition model have done so alongside new branding strategies or marketing campaigns to promote their strengths.



**72%**

of Americans believe that college costs are ‘out of control’



**56%**

of students surveyed in June 2020 said they could no longer afford their tuition



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# ALTERNATIVE REVENUE STREAMS WILL SUPPORT FINANCIAL HEALTH

With little room to raise revenue through increased tuition price points and uncertainty in state appropriations, many institutions will adopt alternative revenue-generating strategies to support their financial flexibility. Institutions can leverage external engagement strategies to maximize the flow of funds, facilitating opportunities such as commercialization of research and other institutional products

and capital, external utilization of physical assets, and development of auxiliary services. Ultimately, the most successful institutions will adopt an approach that combines both conservative and innovative strategies while ensuring that new approaches align with operational needs as well as institutional values and mission.

## Best Practices for Generating Alternative Revenue

### 1. Programs Serving Older Adults, Such as Executive Education and/or Workforce Training

- This can be quite lucrative with corporations spending approximately \$20 billion a year on tuition benefits for employees.

### 2. Programs That Cater to Younger Students Such as Summer School Classes and Dual Credit Programs

### 3. Hyper-Targeted Fundraising Appeals with Personalized Outreach to Alumni and Other Donors

- In 2021, campaigns that focused on how the pandemic is affecting students helped drive up donations to institutions on Giving Tuesday 2020 by 37%.

### 4. Pursuit Of Federal and Non-Federal Grantmaking Programs that Are Focused on Specific Initiatives, such as Advanced Technological Education or Student Support Services



## CASE STUDY Unity College

Unlike a large research institution, **Unity College** does not have a Division I athletic program or a teaching hospital to fall back on when tuition revenue declines. As a result, the small liberal arts college has had to get creative to come up with new sources of funding. It runs a [catering service](#) and rents out cabins and rooms at a lodge it owns in rural Maine, as well as space in its own greenhouse. The college also has expanded the reach of its programming, offering local and international travel classes, [wilderness certifications](#), and [summer camps](#) to the general public. Alongside these alternative revenue generating activities, the institution is in the process of permanently transitioning to a [hybrid learning model](#), a move designed to adapt to changing market conditions and consumer demands.

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# MARKETING STRATEGIES WILL INTEGRATE THE EVOLVING STUDENT JOURNEY

When the pandemic hit in spring 2020, it forced many traditional marketing and recruitment events online. Out of necessity, institutions scrambled to adapt weekend-long open houses and college fairs to a virtual format, while recruiters sought ways to connect with prospective students off campus. Although in-person events are likely to regain their footing post-pandemic, some of the virtual

elements of the new student journey are here to stay. Virtual events allow institutions to reach a broader swath of students, and students appreciate the flexibility that online events can offer – but the key challenge for marketing teams is to sharpen their message and their execution as they manage a greater physical distance in the recruiting process.

## Best Practices For Reaching Students Virtually

### Be Accommodating

Offer multiple dates for virtual events and make recordings available.

### Make It Easy to Find Information

Create a centralized hub for admissions resources and events, with sub-pages tailored to specific student populations, such as graduate students, or academic units, like business schools.

### Put a Human in Front

Institutions must ensure that virtual events remain personal. Start with an introductory video from the president or director of admissions, or let students communicate directly with admissions staff through a chat box.

### Be Mindful of Mission

Virtual materials should capture core institutional values and mission, conveying the campus culture and traditions to students from different walks of life and personal histories.



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# BRAND VALUES WILL BE REVISITED AND VALUE PROPOSITIONS WILL BE REFRESHED

In today's hyper-competitive higher education landscape, institutions must distinguish themselves more than ever. They must communicate their unique culture and value with messaging that is positive and inclusive and take steps to evolve their brand along with their market. If an institution's brand is no longer relevant to key audiences, or no

longer serves as a point of differentiation, it is time to update it. A recent survey of marketing officers found that more than three-quarters of institutions have a documented brand strategy, up from two-thirds of respondents in 2016.

## Best Practices for Re-Purposing Brand Proposition

### Leverage Technology

Institutions should develop a data-driven brand strategy. They should conduct surveys to determine how they are perceived by different audiences, and then use the data to fine-tune user personas for message targeting. Surveys can also measure public recall for specific marketing campaigns.

### Measure Success

Brand tracking, which gathers and analyzes consumer feedback, is another useful tool. It lets institutions test whether new marketing and communication strategies have a positive or negative effect on stakeholder opinion and can offer insight into how an institution is viewed relative to its competitors. Taken together, this information can help institutions develop a current and complete picture of their overall brand health.



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The proportion of institutions that have a documented brand strategy



49%

of surveyed marketing officers conducted a comprehensive redesign of their institutional website in the past two years

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# ABOUT HANOVER RESEARCH

Our insights help institutions strengthen their academic portfolio, maximize enrollment and retention, manage costs, improve brand perception, and engage alumni.

## OUR BENEFITS



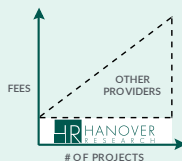
**EXPERT**  
200+ analysts with advanced multiple methodology research expertise



**FLEXIBLE**  
Ongoing custom research agenda adapts with organizations' needs



**DEDICATED**  
Exclusive account and research teams ensure strategic partnership



**EFFICIENT**  
Annual, fixed-fee model shares costs and benefits

## OUR HIGHER EDUCATION SOLUTIONS

### ENROLLMENT MANAGEMENT

Optimize your entire enrollment funnel from enhancing prospective student recruitment to maximizing applicants and matriculants.

### ACADEMIC PROGRAMMING

Build a standout academic program portfolio based on student preference and employer demand.

### STUDENT SUCCESS

Increase retention and maximize student engagement from start date to graduation.

### OPERATIONS & FINANCE

Comprehensive insights to run an efficient, financially sustainable institution.

### ADVANCEMENT

Identify right-fit donors and maximize giving from your key stakeholders.

### MARKETING

Understand your institution's value proposition—and communicate it through messaging that resonates.

### GRANTS

Targeted guidance to bolster the quality, volume, and success rates of your grant applications.

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