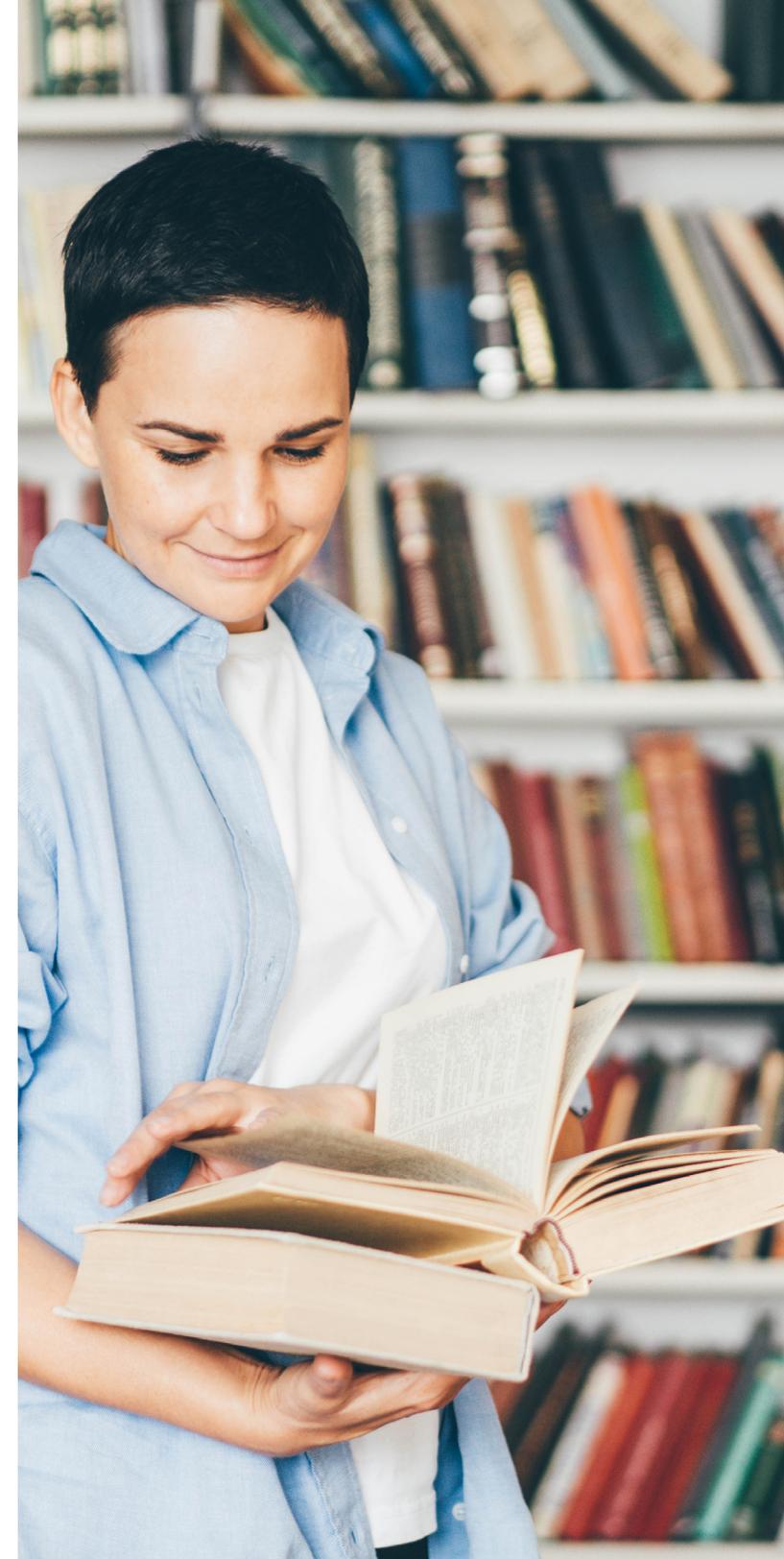


2022 TRENDS IN HIGHER EDUCATION



2022 TRENDS IN HIGHER EDUCATION

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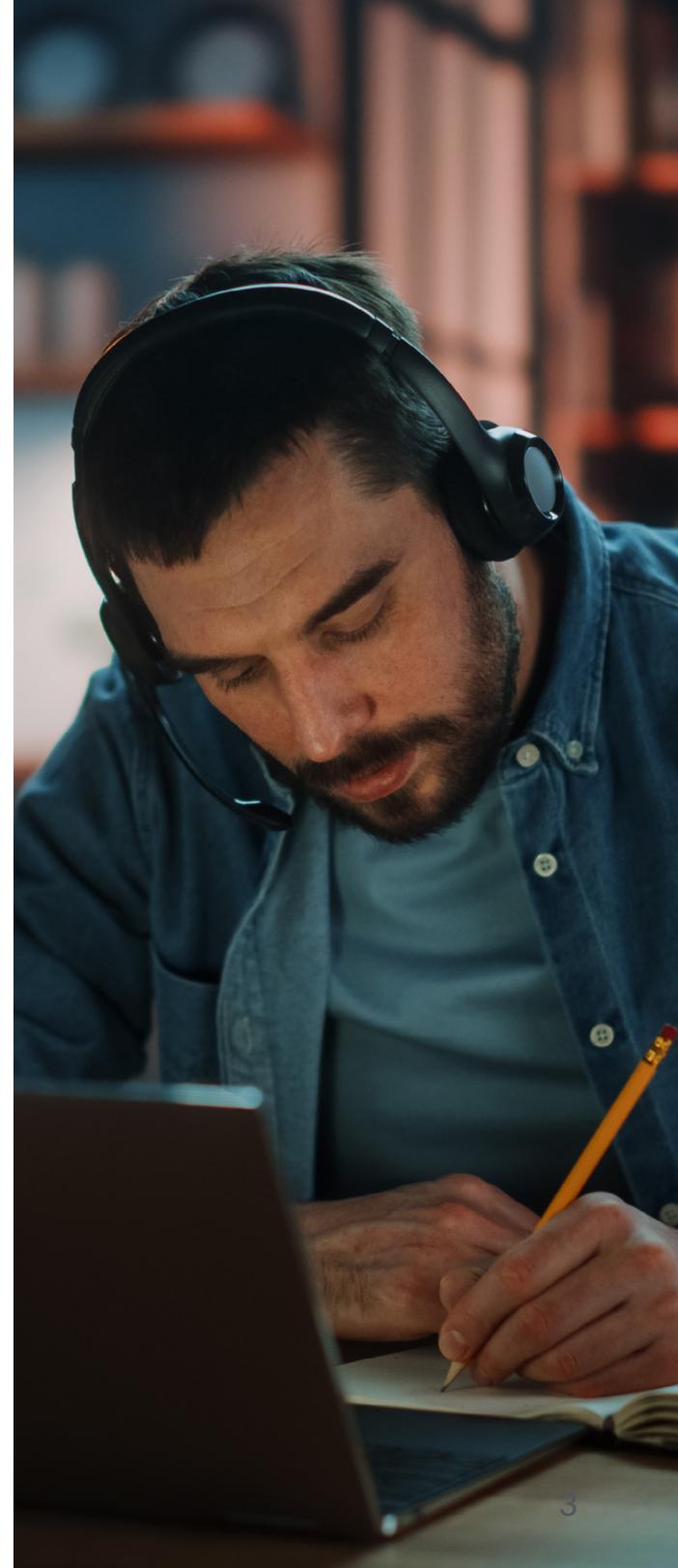
INTRODUCTION

Any notions that the pandemic would demand only a temporary pivot in higher education have given way to an understanding that colleges and universities are undergoing a process of permanent change. Early optimism that COVID-19 vaccines would quickly allow institutions to resume typical on-campus experiences has been tempered by the rise of new variants. As the pandemic has evolved, administrators and faculty have had to keep pace with new ways to deliver instruction and services.

In such a climate, demonstrating value is increasingly crucial. The movement of employees in the “great resignation” further draws questions about how institutions can find inclusive ways to cater to new populations of students and meet the evolving needs of the employers seeking to hire them. Meanwhile, to remain viable amid declining enrollments and increased sensitivity to cost, institutions are rethinking how they market and position themselves.

Even amid so many ongoing challenges and opportunities, colleges and universities are uniquely positioned to boldly demonstrate their value, shake off stereotypes, and evolve their offerings in ways that both meet the needs of their students and communities and provide diversified sources of revenue.

Hanover’s **2022 Trends in Higher Education** report highlights new and continued priorities anticipated for 2022, drawn from our higher education research and experience advising and collaborating with hundreds of institutions across the nation. The trends, recommendations, and case studies outlined in this report align with the formidable decisions higher education leaders face in this moment – decisions that can help build resilient institutions that are ready for whatever comes next.



EXECUTIVE SUMMARY

Hanover is privileged to partner closely with nearly 500 colleges and universities — from a wide range of settings, and with varying demographics and communities served. This allows us to see and understand a comprehensive range of perspectives of the higher education landscape. As we support our members' efforts to serve their stakeholder communities, we also learn from their experiences, including how they overcome challenges and seize opportunities.

Today, it is clear that institutions are at a crossroads and must quickly develop bold strategies that go beyond short-term triage.

Understanding trending data can strengthen college and university leaders' response to the present moment and better equip them to address future challenges.

In our **2022 Trends in Higher Education** report, we have identified five trends that will shape higher education over the coming year and will alter the landscape in ways that might have seemed unimaginable even months ago.

THE 2022 TRENDS IN HIGHER EDUCATION



Academic Portfolios Focus on Skills for a New Employment Era

Colleges and universities will continue to reshape offerings, learning outcomes, and tuition structures to ensure they include in-demand credentials that will prepare graduates for a new era of work and upskilling.



Enrollment Strategies Meet Students Where They Are

Institutions will offer increased flexibility in how students apply, qualify for admission, onboard, and access enrollment services to accommodate a more diverse and less time-and-place-bound student body.



Institutions Focus Brand Value on Practicality over Prestige

Institutions will increasingly articulate their distinctive features and demonstrate the tangible benefits their students will gain by enrolling and completing their studies.



Grant Funding Supports Responsive Programming and Helps Stabilize Budgets

Colleges and universities will look to creatively streamline existing costs and identify new revenue sources, particularly with grant funding opportunities.



Institutions Set Sights on Measurable Diversity, Equity, and Inclusion Results

Institutions will examine their data and establish meaningful ways to measure progress on the closure of equity gaps and improved diversity and sense of belonging on campus.



TREND 1: ACADEMIC PORTFOLIOS FOCUS ON SKILLS FOR A NEW EMPLOYMENT ERA

Colleges and universities will continue to reshape offerings, learning outcomes, and tuition structures to ensure they include in-demand credentials that will prepare graduates for a new era of work and upskilling.

TREND 1: ACADEMIC PORTFOLIOS FOCUS ON SKILLS FOR A NEW EMPLOYMENT ERA



The number of U.S. workers who are “very” or “extremely” interested in training to upgrade or learn new skills



The number of workers who say they would change fields if they lost their job because of the pandemic



The percentage of employees worldwide who will need reskilling by 2025

TREND OVERVIEW

While a college degree remains a critical milestone to employment, it is no longer the first and foremost priority for workers or employers. Increasingly, both groups are valuing specific skill sets to gain a foothold and navigate a job market rocked by unprecedented turnover and rising demand for candidates in high-growth fields (such as healthcare, data science, cybersecurity, coding, and machine learning). This shift will require colleges and universities to review existing programming to ensure their students gain both the hard and soft skills they will need to succeed in future careers.

INCREASED DEMAND FOR UPSKILLING

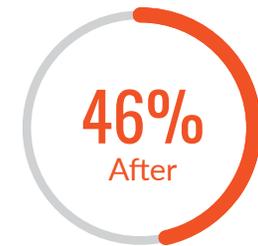
In many cases, preparing for a career will not entail a traditional four-year degree. The pandemic’s impact on the job market has boosted interest in non-degree and certificate credentials that support in-demand fields like health informatics and business. The World Economic Forum, for example, estimates that 50% percent of employees worldwide will need reskilling by 2025. This makes the value of micro-credentials, stackable certificates, boot camps, and other flexible, affordable learning options a critical opportunity for students looking to skill up quickly, particularly as institutions increasingly attempt to recruit more adult learners and mid-career employees.

WORKERS’ INTEREST IN UPSKILLING OPPORTUNITIES

INTEREST BY LEVEL OF EXPENSE



INTEREST IN TRAINING DURING OR AFTER WORK HOURS



TAKE ACTION

New market realities will compel colleges and universities to conduct academic program assessments and develop a more flexible, skills-first mindset that reevaluates current academic offerings, learning outcomes, and delivery formats to ensure students are primed to enter the job market. These models will also be essential to help seasoned employees refresh and refine their capabilities.

RELATED READING

To learn more about academic program development, be sure to check out the following:

- **Four Critical Steps to Optimizing Academic Portfolios**, a guide to a four-phase approach to new program design
- **A Step-by-Step Guide to Creating A Comprehensive Academic Portfolio Review**, a resource for establishing metrics for a data-informed program assessment process
- **Seven Key Findings in COVID-19 Hiring Trends**, a source for labor market trends based on real-time job postings
- **Top 10 Degrees on the Rise in 2021**, an infographic with the fastest-growing undergraduate and post-graduate degrees



**MESA
COMMUNITY COLLEGE**
A MARICOPA COMMUNITY COLLEGE

SPOTLIGHT: Mesa Community College

In 2019, Mesa Community College (MCC) in Arizona partnered with The Boeing Company to design a short-term boot camp to fill a workforce need for more electrical cable harness wirers.

MCC faculty and staff worked with Boeing to develop the curriculum. The two-week, three-credit course is taught by Boeing employees and prepares students to take an industry-recognized certification exam. Students who successfully earn the wiring harness certification are reimbursed the full cost of tuition, paying just \$15 in out-of-pocket fees.

The boot camp:

- ▶ Exposes students to aerospace careers while keeping costs low
- ▶ Provides the necessary skills to immediately pursue in-demand jobs in the field
- ▶ Includes an opportunity for course graduates to interview for full-time positions at Boeing

The results: 87% of course graduates who applied to Boeing in March 2020 receiving offers for contract work.



TREND 2: ENROLLMENT STRATEGIES MEET STUDENTS WHERE THEY ARE

Institutions will offer increased flexibility in how students apply, qualify for admission, onboard, and access enrollment services to accommodate a more diverse and less time-and-place-bound student body.

TREND 2: ENROLLMENT STRATEGIES MEET STUDENTS WHERE THEY ARE



The percentage decline of students ages 25 to 29 enrolled in Fall 2021



The percentage of decline in completed Free Application for Federal Student Aid (FAFSA) applications from 2020 to 2021



The number of adults who have changed or canceled their educational plans due to COVID-19



The increase in the number of institutions offering ACT/SAT-optional testing policies between the 2019 and 2022 admissions cycles

TREND OVERVIEW

The rapid pivot to online learning at the outset of the pandemic began to shift student expectations of how colleges and universities should deliver a robust digital classroom experience. It also increased student expectations about having access to 24/7 digital enrollment transactions and real-time admission and registration communications. The pandemic's endurance, however, has affected enrollment among all ages. FAFSA completion rates, which are strongly associated with postsecondary enrollment, declined 4.8% from 2020 to 2021 (equivalent to 102,000 fewer high-school seniors). One in 3 adults have changed or cancelled their education plans due to COVID-19. Meanwhile, overall

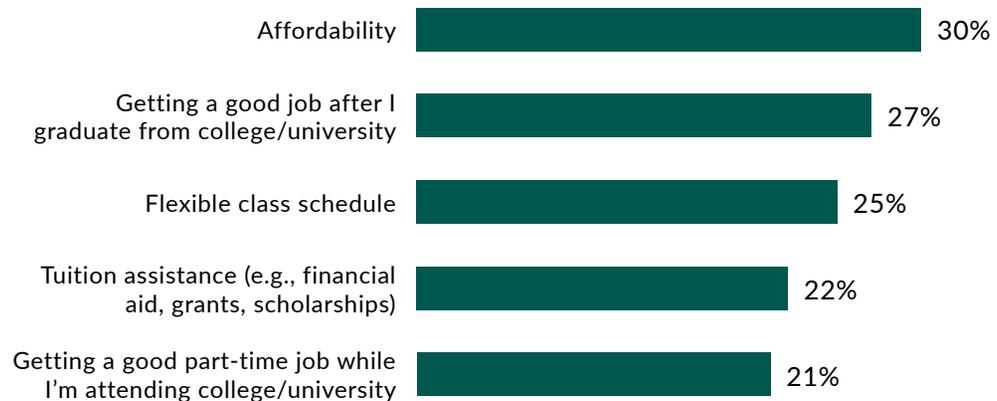
student satisfaction with their institution slipped nearly 4% this year.

FLEXIBILITY AND TRANSPARENCY

To remain competitive, institutions must continue to demonstrate how they are evolving to meet the needs of a diverse student body, and how they plan to reduce enrollment barriers by keeping the latest challenges of potential applicants top of mind. They can adapt by reimagining ways to foster meaningful connectivity, both in person and online, such as offering a range of in-person and virtual events, more virtual engagement with current students, and easy digital communication with admissions advisors.

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TOP 5 FACTORS WHEN DECIDING TO APPLY FOR A COLLEGE PROGRAM



Sources: National Student Clearinghouse Research Center, Strada Education Network, National College Attainment Network, Hanover Research

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Above all, a new sense of flexibility and transparency will inform the student admissions and onboarding process. This may involve rolling start dates, more prevalent ACT- and SAT-optional testing policies, shorter academic terms, a clear itemization upfront of all tuition and fees to help students navigate the financial aid process, and assistance in applying for all available funds to reduce their personal financial responsibilities.

TAKE ACTION

Colleges and universities must take new and thoughtful measures to broaden and modernize their outreach, recruitment, and admission strategies. Such actions can better accommodate shifting student expectations, attract nontraditional student populations, and retain as many current and would-be “stopout” students as possible. To do this, institutions will need to assess their entire enrollment funnel to analyze pain points and uncover new opportunities to help students persist through to graduation.

RELATED READING

- **The State of Prospective Student Enrollment**, national survey results of more than 800 U.S. high school sophomores and juniors considering undergraduate programs in 2022 or 2023
- **National Admitted Student Survey**, findings from a national survey of students admitted to colleges and universities in fall 2021
- **The Pandemic’s Effect on New Student Enrollment**, a webinar with a panel of administrators from five universities sharing insights on emerging and promising enrollment opportunities
- **Nine Tips to Attract Gen Z**, an infographic outlining Gen Z’s preferences and priorities

UNIVERSITY of HOUSTON

SPOTLIGHT: University of Houston

Far-reaching effects of the COVID-19 pandemic and recent social justice protests prompted the University of Houston (UH) to redesign its admissions and onboarding process with applicants’ external circumstances in mind. As a result, UH leaders instituted test-optional admissions across the entire system in 2020 to ensure strong, diverse candidates are not overlooked.

Heightened safety and accessibility needs prompted the admissions office to offer live virtual tours led by UH student ambassadors, along with virtual advising and new student orientation sessions with in-person and online options.

“Disruption creates opportunity,” said Mardell Maxwell, UH’s executive director of admissions. “We have to understand that one size doesn’t fit all.”



TREND 3: INSTITUTIONS FOCUS BRAND VALUE ON PRACTICALITY OVER PRESTIGE

Institutions will increasingly articulate their distinctive features and demonstrate the tangible benefits their students will gain by enrolling and completing their studies.

TREND 3: INSTITUTIONS FOCUS BRAND VALUE ON PRACTICALITY OVER PRESTIGE



The decrease in U.S. adults who considered a college education to be “very important” between 2013 to 2019



The number of students who believe their degree will be worth the same as one earned before the pandemic



The percentage increase in university leaders who felt their institution needed to strengthen its brand perception in light of COVID-19 between March and June 2020

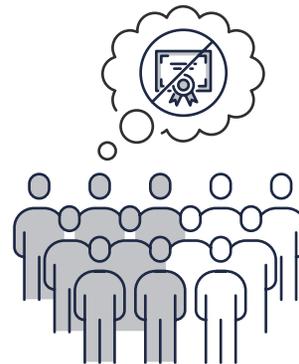
TREND OVERVIEW

Higher education branding once relied on name, logo, and tagline recognition. However, students and families now demand more assurance of their potential return on investment. Institutions will be expected to demonstrate their value proposition with compelling data that can pinpoint and reinforce the exceptional qualities that set them apart, regardless of their prestige. Effective outreach will target various audience segments and promote advantages (such as affordability, amenities, or personalized learning experiences) that best align with applicants’ top concerns.

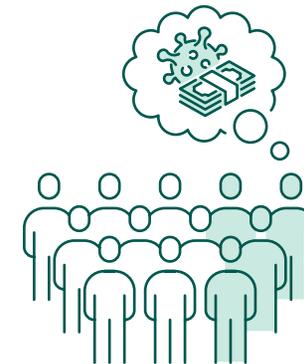
Faced with rising public skepticism about the value of a college degree and an abundance of educational entities from which students may choose, many institutions have already taken steps to revamp their branding to bolster enrollments. Three-fourths of Americans believe higher education is worth the cost, a figure that has remained steady since the onset of COVID-19. But now, more people have a negative view toward the pursuit, and declines in positive ratings of a college education are steepest among ages 18 to 29. Without intervention, these sentiments could be detrimental to institutions’ long-term solvency.

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GENERATION Z STUDENT PERCEPTIONS



More than 50% of Generation Z (born 1995-2012) say they are open to pursuing something other than a four-year bachelor’s degree to prepare for their futures



1/3rd of polled Gen Zers say the financial fallout of the pandemic has made it unlikely they will pursue a four-year degree

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REVISING NARRATIVES

As educational leaders seek to reinvigorate their institutions' identities, they can strengthen and inform new narratives by looking within: gathering key data from institutional assessments, surveys of prospective and enrolled students, and analyses of marketplace position.

TAKE ACTION

Institutions that heavily relied on their reputation as a selling point are at a disadvantage in the wake of the COVID-19 pandemic. To mitigate skepticism about the modern experience, colleges and universities will need to assess current brand perceptions, analyze their market position, identify the distinctive features that set them apart, and demonstrate compelling, tangible benefits students can expect from enrolling.

RELATED READING

- **Communicating Value in a Pandemic-Shaped World**, a webinar roundtable with leaders from three universities sharing their tips for differentiating marketing and recruitment efforts
- **The State of Prospective Student Enrollment**, national survey results of more than 800 U.S. high school sophomores and juniors considering undergraduate programs in 2022 or 2023
- **Brand Health 101 Guide**, a tool to develop, analyze, and communicate an institution's value



GARDNER-WEBB
UNIVERSITY

SPOTLIGHT: Gardner-Webb University

Gardner-Webb University is a private, Christian liberal arts university nestled in the foothills of the Blue Ridge Mountains of North Carolina. Faced with declining enrollment, the university launched a rebranding effort to champion its unique strengths and to target prospective students seeking those same qualities.

The campaign focused on Gardner-Webb's:

- ▶ Student-centered approach
- ▶ Faith community
- ▶ Location
- ▶ Academic experience
- ▶ Access to faculty

As part of a larger strategic plan, the university's authentic rebranding and renewed marketing approach led to a 10.3% increase in undergraduate enrollment.



TREND 4: GRANT FUNDING SUPPORTS RESPONSIVE PROGRAMMING AND HELPS STABILIZE BUDGETS

Colleges and universities will look to creatively streamline existing costs and identify new revenue sources, particularly with grant funding opportunities.

TREND 4: GRANT FUNDING SUPPORTS RESPONSIVE PROGRAMMING AND HELPS STABILIZE BUDGETS

TREND OVERVIEW

As institutions work toward stability and leaders wait to hear if additional federal pandemic relief funds will be awarded beyond 2022, college and university leadership will prioritize ensuring long-term financial security to ward off future economic upheavals.

With many colleges and universities receiving fewer tuition dollars, including a continued significant loss of international student revenue, it is essential for them to review existing program costs and determine how to consolidate or streamline offerings that operate at a financial loss. More broadly, institutions also will need to investigate how to diversify revenue streams (such as with grants) and reevaluate existing tuition models.

FOSTERING A GRANT-SEEKING CULTURE

Fostering a strong grant-seeking culture on campus can do more than advance research infrastructure; it may also support new initiatives across campus that would otherwise not be feasible within existing budgets.

Leaders must organize to establish staffing and training to pursue the appropriate grant dollars, a process that should include protocols for prioritizing goals, needs, expenditures, and proposal writing.

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Average amount received per college or university in federal agency grants awards in 2018

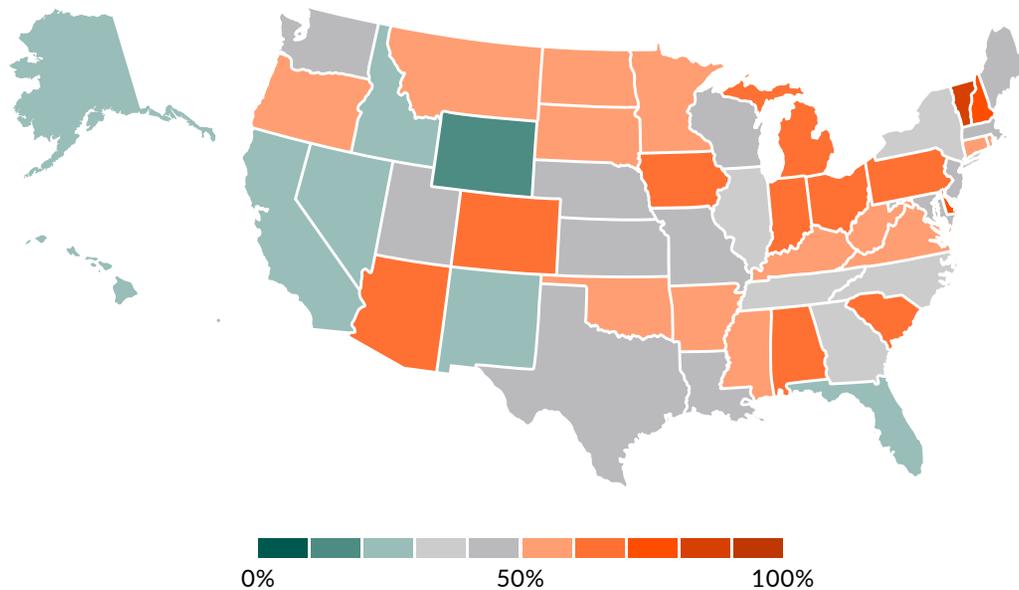


5,100

The number of individual grants available to colleges and universities in fiscal year 2021 from the U.S. Department of Education (not including American Rescue Plan funds)

STUDENT SHARE OF TOTAL EDUCATION REVENUE BY STATE

In half of all states, tuition and fees have become the primary revenue source for public higher education



Sources: USAspending Data Lab, US Department of Education, State Higher Education Executive Officers Association

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EVALUATING TUITION MODELS

As more students are drawn away from traditional brick-and-mortar courses of study, colleges and universities will need to investigate or implement new ways to recoup tuition dollars. Differential, or tiered, pricing that charges higher tuition or fees for certain majors or courses as well as subscription-based tuition (in which students move at their own pace and are charged a flat rate) will be investigated as a means to regain balance. Additionally, more institutions will expand self-contained revenue-generating programming such as continuing education, noncredit workshops, and boot camps.

TAKE ACTION

Creative and systemwide efforts to balance institutional budgets for long-term stability must be a top priority. Doing so requires steadfast collaboration to streamline existing costs and to identify alternative revenue streams, such as taking advantage of the considerable number of grants available from both public and private sources. Implementing new tuition pricing models also can be pivotal in solvency planning. Institutions will look to tuition benchmarking to assess the competitive landscape and they will leverage tuition optimization studies to highlight various pathways to maximizing revenue.

RELATED READING

- **Diversifying Grant Funding Sources**, a webinar with Hanover's Grants Consultants sharing their experiences helping clients to navigate a diverse range of potential funders
- **Grantmaking Trends in Diversity, Equity, and Inclusion**, a webinar overview of key trends related to funding for DEI initiatives
- **Strategic Planning in Higher Educations – Best Practices and Benchmarking**, a report profiling many institutions' strategic planning processes, including funding models and financial planning



CALIFORNIA STATE UNIVERSITY
FULLERTON

SPOTLIGHT: California State University, Fullerton

By launching initiatives designed to instill a grant-seeking culture across the organization, California State University, Fullerton, brought in a record \$31.5 million in grants and contracts in 2019-20. This increase was supported by efforts that include offering seed funding through the university's Office of Research and Sponsored Projects and mentoring junior faculty through the proposal and development process.

CSUF continues to emphasize collaboration in their approach to grant seeking.

"We're a large university and can strengthen our cross-college and cross-disciplinary collaborations. Funders like the synergies and potential for greater impact that partnerships can bring, and awards can be larger," said Binod Tiwari, associate vice president of research and sponsored projects.



TREND 5: INSTITUTIONS SET SIGHTS ON MEASURABLE DIVERSITY, EQUITY, AND INCLUSION RESULTS

Institutions will examine their data and establish meaningful ways to measure progress on the closure of equity gaps and improved diversity and sense of belonging on campus.

TREND 5: INSTITUTIONS SET SIGHTS ON MEASURABLE DIVERSITY, EQUITY, AND INCLUSION RESULTS



50%

The percentage of college students who report a lack of awareness about DEI initiatives as the largest barrier to getting involved



61%

The percentage of students of color who have felt isolated or alienated on campus due to an aspect of their identity, compared to 53% of white students



60.8%

The percentage of college students who have reported increased anxiety during the COVID-19 pandemic

TREND OVERVIEW

There is no question that diversity, equity, and inclusion (DEI) initiatives are critical for institutions to effectively close opportunity gaps and provide safe, affirming spaces that enhance learning for historically underserved students. Most institutions have articulated the importance of prioritizing DEI programs and related large-scale changes, but true change often proves far more difficult to implement than to ideate.

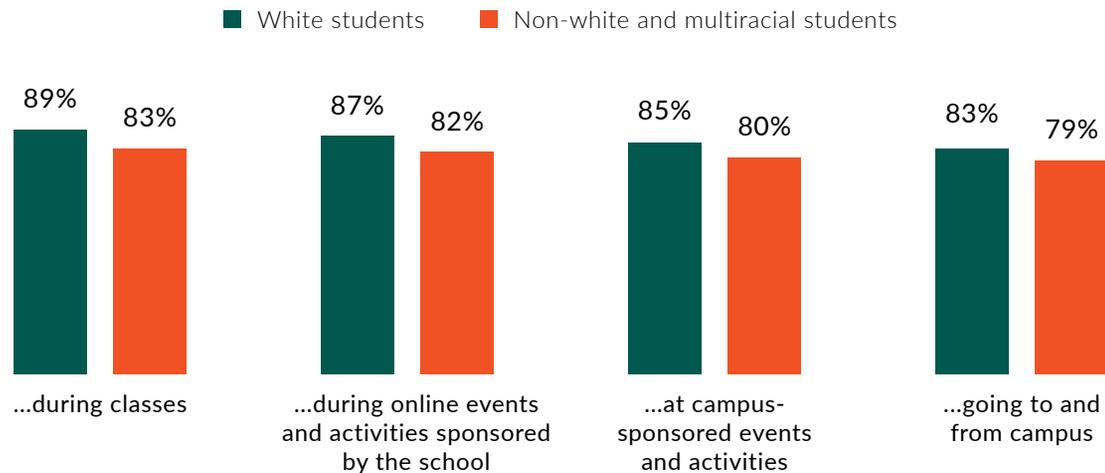
DATA-DRIVEN ACTION

Colleges and universities will be expected to measure and demonstrate tangible results in reaching their DEI goals, particularly when

it comes to providing culturally relevant, inclusive, and affirming supports that help increase a sense of belonging among students. Being accountable to larger change will require a thoughtful, data-driven approach toward DEI to understand current gaps in campus equity, to establish baselines, to measure the progress of related initiatives to date, and to set a course for continuous, actionable equity-focused strategic planning. It will also require that DEI offices and groups operate with active student participation and qualitative stakeholder feedback to ensure initiatives are appropriate and responsive to students' lived experiences.

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AT MY INSTITUTION I FEEL SAFE...



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ADDRESSING MENTAL HEALTH

Facing a surge of mental health concerns since the pandemic began, institutions also will continue to seek ways to provide acute and preventive mental health services, resources, and activities to keep pace with the broader needs of students (and also faculty and staff) who may be experiencing heightened anxiety, depression, or other distress.

TAKE ACTION

When it comes to implementing or expanding DEI programs, institutions must think holistically and continuously evolve with student, faculty, and staff participation and feedback. By auditing and examining institutions' equity data and climate survey findings, leaders can begin to develop authentic, measurable progress plans that will ensure improved student outcomes and increased sense of belonging. This framework is particularly important to have as student needs and demographics shift across many campuses.

RELATED READING

- **Higher Education Diversity, Equity, and Inclusion Student Survey**, a national survey of 2,100 college students in 2020
- **The Struggle of Student Retention**, an infographic that outlines the major costs of attrition and practices that keep students enrolled
- **Supporting Students and Mental Health Needs in an Evolving Landscape**, a webinar roundtable with three university administrators sharing strategies to support student mental health
- **Benchmarking Diversity, Equity, and Inclusion Committees**, a comparative analysis of DEI committee structures and practices on college campuses



SPOTLIGHT: Brown University

Brown University in Providence, Rhode Island, has incorporated assessment, responsibility, and accountability into all aspects of its Diversity and Inclusion Action Plan (DIAP).

In addition to the formal DEI strategic plan, the university produces an annual report, and each organizational unit establishes and monitors progress toward department-level goals. A diversity dashboard on Brown's DIAP website allows anyone to access key DEI data points in real time. A Diversity and Inclusion Oversight Board, comprised of students, faculty, and staff, meets monthly to review and discuss progress on the university's goals.

Together, this network of planning, assessment, and regular data-driven reporting cultivate a culture of accountability across stakeholders and organizational structures to ensure the campus community is making measurable advancements in DEI.



Even amid so many ongoing challenges and opportunities, colleges and universities are uniquely positioned to boldly demonstrate their value, shake off stereotypes, and evolve their offerings in ways that both meet the needs of their students and communities and provide diversified sources of revenue.

CONCLUSION

Colleges and universities will not revert to pre-pandemic models of enrollment, classroom education, and revenue generation, even after COVID-19 recedes.

The higher education landscape, long rooted in decades-old practices, must continue its rapid assessment and embrace of innovative strategies that attract and engage students without sacrificing educational quality or financial stability.

These efforts will be designed to bridge the virtual and in-person worlds while addressing the challenges of nontraditional and underserved students. But they cannot be developed in a vacuum: Research and targeted data are essential to analyzing the causes and solutions of many systemic problems exacerbated by the public health crisis. The findings can inform actionable approaches to fortify institutions against unforeseen events, shifting student preferences, and competitors' moves in the years ahead.

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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.

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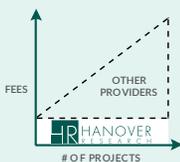
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