

2023

TRENDS IN HIGHER EDUCATION



2023 TRENDS IN HIGHER EDUCATION

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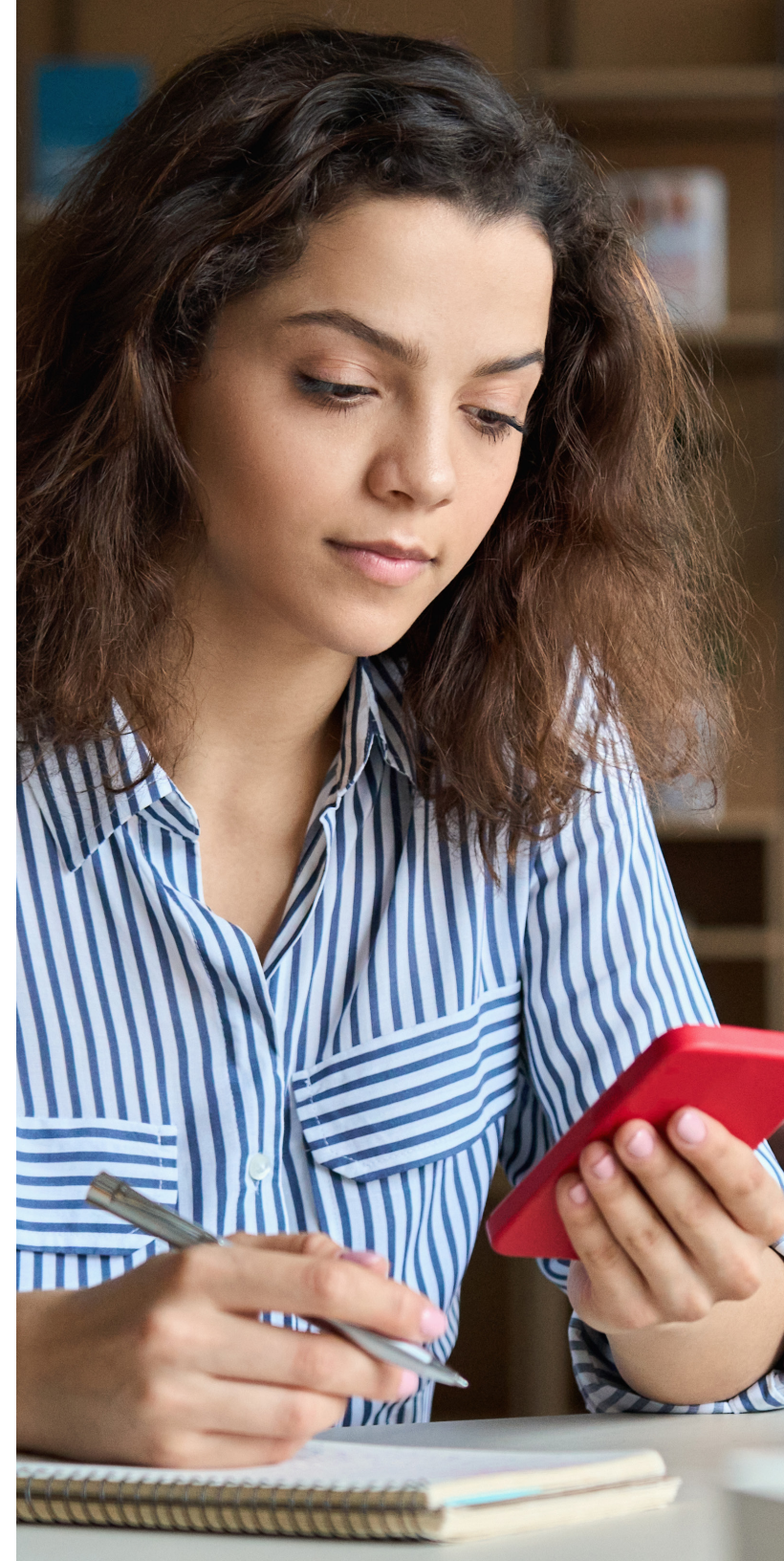
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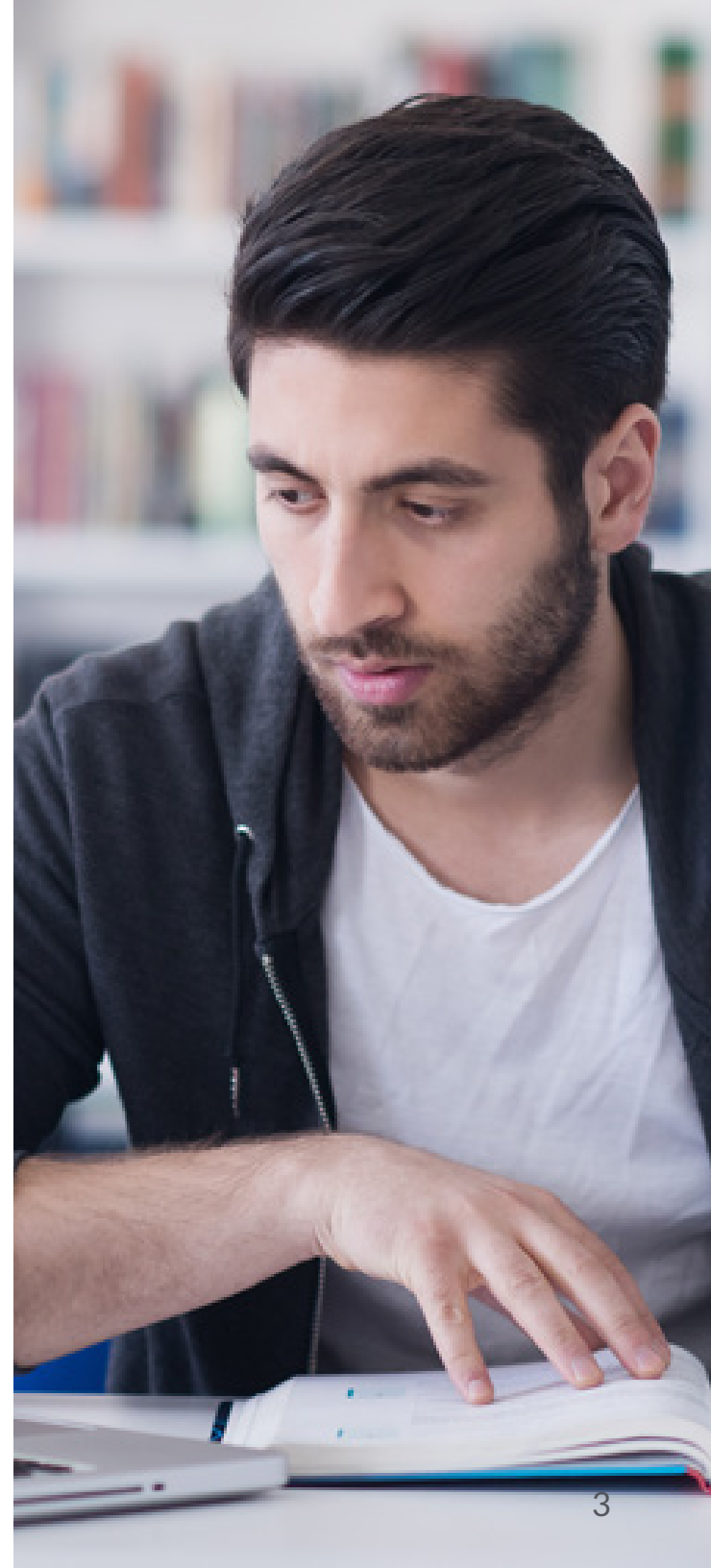
INTRODUCTION

Three years into the pandemic, colleges and universities continue to adapt while making strategic decisions that are reshaping higher education for the long term.

Faced with financial, enrollment, and marketing challenges, institutional leaders are embracing new tuition, degree, and classroom models that move beyond decades of tradition. They're addressing critical mental health and equity needs that are necessary to sustain a resilient and welcoming campus. And they are evolving their messaging to confidently champion the value of their educational experience, even as economic headwinds and public sentiment threaten to diminish the pursuit of a degree.

Higher education providers that stay current with the needs of students and the industries that will employ them are best positioned to survive – and thrive – in the years ahead. This means instituting bold ideas, such as debt-free education, or reimagining how learn-as-you-go (or “stackable”) credits could be applied toward a certificate or degree. Today's undergraduate and graduate students are accustomed to flexibility and digital-first models; a strategic, future-forward approach to their learning is key to elevating an institution's brand and attracting more potential enrollees.

Hanover's **2023 Trends in Higher Education** report highlights new and continued priorities for the year, drawn from our higher education research and experience advising and collaborating with hundreds of institutions. The trends, recommendations, and case studies outlined in this report align with the formidable decisions higher education leaders face as they work to deliver their core services while anticipating what's next.



EXECUTIVE SUMMARY

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

To help college and university leaders meet the moment, the 2023 Trends in Higher Education report sheds light on five trends that will shape higher education in the coming year.



FIVE TRENDS IN HIGHER EDUCATION

1. Career-Focused Learning Flourishes in Modernized, Stackable Formats

Colleges and universities focus on modernizing academic programs to meet the demand for more targeted, modular learning that connects to future jobs.

2. Debt-Free Education Captures Attention

With student loan forgiveness spotlighting the high cost of a college degree, institutions look to help students fund their education without taking on significant debt.

3. Institutions Rework Financial Models and Revenue Streams to Attain Sustainability

With tuition revenue becoming less reliable, colleges and universities invest in alternative approaches to ensure long-term financial stability via new sources of income.

4. Inclusion and Support Services Build Connection, Acceptance, and Success

A strong link between student belonging and persistence drives institutions to ramp up student-centered support and success services to ensure every enrollee is mentally, socially, and academically prepared for college life.

5. Increased Marketing Spending Puts Pressure on Quantifiable Results

As investments in marketing rise, institutions increasingly focus on how to quantify their marketing results.



TREND 1: CAREER-FOCUSED LEARNING FLOURISHES IN MODERNIZED, STACKABLE FORMATS

Colleges and universities focus on modernizing academic programs to meet the demand for more targeted, modular learning that connects to labor market needs.

TREND 1: CAREER-FOCUSED LEARNING FLOURISHES IN MODERNIZED, STACKABLE FORMATS



39 million

The estimated number of adults who completed some college but left without a credential or degree, as of July 2020



76%

The percentage of employers who are more likely to hire a candidate who has earned a professional certificate



3.1%

The percentage increase in student demand for undergraduate certificates between 2020 and 2022



1/2

The share of working community college students who say they have difficulty scheduling classes around their job

TREND OVERVIEW

From microcredentials and credit for prior learning to competency-based education, institutions are looking to appeal to students' growing expectations for direct and immediate pathways to gainful employment. Programs that emphasize job readiness or career training are capturing the attention of students and employers. These programs also provide institutions with a way to grow enrollment by capitalizing on the demands for targeted skills and flexible scheduling.

FLEXIBLE, IN-DEMAND TRAINING

With fewer students able or willing to manage the cost, structure, and time commitment of a traditional bachelor's degree, more institutions are reevaluating decades-old curricula, learning outcomes, and program formats. To increase flexibility in learning, one growing approach is microcredentials – short, skills-focused recognitions that demonstrate competency in a focused area. When offered as a “stackable” program, they can provide a pathway to a certificate or even a full degree, achieved at a student's preferred pace.

Whether available as a certificate or other offering, this bite-sized programming creates an opportunity for students to return to college over time as their educational and career goals evolve. And the concept doesn't necessarily cannibalize a traditional degree: Recent studies suggest that, in many sectors, microcredentials facilitate attainment of specialized knowledge, suggesting that the core audience may be college graduates. This, in turn, offers another revenue stream for institutions.

TAKE ACTION

The demands and desired skills for the modern workforce continue to evolve. Microcredentials can provide a viable, flexible way for employees to keep pace, and they're a fitting option for a diverse range of potential students. Institutions can identify the subjects and competencies that align with their existing academic and financial resources to develop programs that attract and benefit enrollees – as well as help bolster incoming revenue.

Sources: National Student Clearinghouse Research Center, Coursera, Center for Community College Student Engagement

FURTHER READING

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

- **Top 10 Degrees on the Rise in 2022**, a report detailing the fastest-growing occupations, drivers of degree demand, and resources to assess your institution's programs
- **Top 10 Microcredentials** (*Hanover member-only access*), a brief that highlights trends in microcredentials, national job postings, and employer expectations
- **Top Career Skills for New Grads**, a guide to understanding the student experiences and skills employers value most – and critical ways to prepare graduates for success
- **A Step-by-Step Guide to a Comprehensive Academic Portfolio Review**, which explains how a data-informed process can help higher ed leaders develop new programs and evaluate current ones
- **Data-Informed Academic Portfolio Review in Higher Ed**, a blog post with actionable tips to ensure your academic programs remain relevant for a new era



SPOTLIGHT: Fayetteville State University

The Lloyd College of Health, Science, and Technology at Fayetteville State University in North Carolina partnered with Hanover to complete a thorough academic needs assessment. The college currently offers a range of undergraduate degrees in nursing, biological and forensic sciences, chemistry, physics, materials sciences, mathematics, and computer science as well as a graduate program in nursing.

To prepare students to work at the forefront of the intersection of STEM and healthcare, college leadership is using key academic portfolio data to determine which programs to expand, maintain, or scale back. With Hanover's help, they also are tracking which emerging programs in the health, life, and natural sciences may be a good fit to launch in their region in the future.

Source: Hanover Research



TREND 2: DEBT-FREE EDUCATION CAPTURES ATTENTION

With student loan forgiveness spotlighting the high cost of a college degree, institutions look to help students fund their education without taking on significant debt.

TREND 2: DEBT-FREE EDUCATION CAPTURES ATTENTION

TREND OVERVIEW

Cost is a top factor that determines where — and if — a prospective student chooses to enroll, according to Hanover’s **2022 National Prospective Student Survey**. To mitigate enrollment challenges tied to the price of attendance, colleges and universities are increasingly exploring how to implement “no-loan” policies, tuition guarantees, or other bold practices aimed at controlling the debt burden for students and families. Additionally, more institutions are understanding the importance of clearly communicating with students about other aid options that can be combined to help fund their education without debt, such as state grants, scholarships, fee waivers, tuition assistance programs, and cash aid.

REMOVING FINANCIAL BARRIERS

A growing roster of no-loan colleges and universities deliver a simple promise: to meet 100% of a student’s need for financial aid with grants, scholarships, and other tuition aid strategies. These institutions,

which market their ability to limit the need for students and families to borrow money, must identify where these support funds will be sourced — as well as how to handle resulting shifts in application and acceptance numbers. The model can require millions of dollars annually to support and may not be possible for all institutions.

Whether or not a no-loan structure is feasible, enrollment and financial aid messaging should actively promote other viable and diverse ways to pay for college that may be less known to students. These may include streamlined pathways to apply prior-learning or Advanced Placement credits toward students’ graduation requirements, as well as scholarships or grants, such as promise programs, issued at the state, local, or institutional level. Promoting employer-sponsored tuition assistance programs can help to bolster nontraditional student recruitment efforts. Ultimately, institutions must also communicate how recent federal changes to student-loan forgiveness programs could impact financial aid in the future.



The number of prospective undergraduate students who say paying for their education is their top concern about attending college



The average estimated expenses for a full-time, in-state undergraduate student at a public four-year institution in 2022–23



The percentage of people who graduated college in 2015–16 who have not yet paid off their student loans



The average amount of financial aid full-time undergraduate students received in 2021–22 (across grants, federal loans, education tax credits and deductions, and federal work-study)

TREND 2: DEBT-FREE EDUCATION CAPTURES ATTENTION

TAKE ACTION

College attendance costs are a top concern for all students, so demonstrating and promoting practical pathways to affordable tuition is an important part of every institution's messaging. Still, many students and families are not aware of debt-free tuition models or external programs to help with tuition and fees. Institutions should creatively identify additional resources for more need-based support and market them, while their financial aid centers must focus on synthesizing and simplifying processes to help prospective and admitted students understand and access the dizzying array of aid options that can exist.

RELATED READING

- **Student Loan Forgiveness: What's Next for Higher Education**, a webinar panel of college enrollment, finance, and marketing leaders discussing the impact of student debt relief
- **3 Ways to Increase Engagement with Admitted College Students**, a blog post with tips to engage with and excite your next incoming cohort
- **2022 National Admitted Student Survey**, a report that details the top factors driving application and enrollment, as well as first-year needs and expectations

#CaliforniansForAll CollegeCorps

SPOTLIGHT: Californians For All College Corps

A new statewide college service program in California was announced in 2022 to help low-income, full-time students pay for their education. College Corps will select up to 6,500 college students over two years to receive \$10,000 for tuition and living expenses in exchange for 450 hours of community service work. The aim is to help students reduce their debt while serving organizations that focus on K-12 education, food insecurity, and climate change across the state.

While it's unclear if this type of initiative will catch on in other states, College Corps was launched in partnership with 45 higher education institutions, including community colleges, California State Universities, the University of California system, and private institutions.

"Providing more pathways to a debt-free degree while empowering students to pursue service-oriented career paths is a reflection of our shared commitment to access, affordability, and public service."

— Michael V. Drake, President, University of California

Source: California Volunteers



TREND 3: INSTITUTIONS REWORK FINANCIAL MODELS AND REVENUE STREAMS TO ATTAIN SUSTAINABILITY

With tuition revenue becoming less reliable, colleges and universities invest in alternative approaches to ensure long-term financial stability via new sources of income.



The overall drop in undergraduate enrollment between fall 2020 and fall 2022



The percentage of inflation in the cost of running an institution in the 2022 fiscal year



The number of prospective students who consider cost very or extremely important when selecting which college or university to attend

TREND OVERVIEW

Pandemic-related attrition, the impending enrollment cliff, inflation, and public skepticism about the value of higher education continue to impact institutions' finances. These obstacles are forcing leaders to review – and rethink – their operating models to maintain long-term solvency, a reckoning that may start with the consolidation or sunsetting of programs that are cost prohibitive. Efforts to boost income may also involve exploring outside funding, new tuition pricing models, and the delivery of educational options outside of the traditional degree.

ALTERNATIVE REVENUE STREAMS

Beyond cost-cutting measures, new tuition models can also offer institutions a trackable way to align their revenue and expenses amid enrollment declines. Some colleges and

universities have implemented differential pricing (charging more for certain academic programs or for upper classmen, for example) or subscription-based tuition (charging students based on a certain time frame without certain course or competency requirements).

Perhaps the most critical strategy to filling budget gaps will come from actively pursuing other streams of revenue. These include grant seeking, fundraising, and self-funded programming, such as continuing education, non-credit courses, camps, and other revenue-generating activities. Such initiatives require a thorough assessment of resources and public demand to ideate and deliver added revenue, and they can represent a strong way to extend brand awareness and nurture a connection with an audience beyond traditional students and alumni.

3 WAYS TO BUILD A CAMPUS GRANTSEEKING CULTURE

The estimated federal grant funding for higher education is nearly \$200 billion, but a substantial portion of that goes to a small number of universities. How can your institution compete for more grant dollars?

- Establish sufficient grantseeking staffing and training
- Develop a process for prioritizing goals, needs, and expenditures
- Ensure adequate time for proposal writing and reporting

TAKE ACTION

Public interest in learning remains high, but a traditional four-year degree isn't for everyone. Colleges and universities can find new students and revenue with nontraditional programming that bears a college or university's name and resources. Institutional leaders must also pour resources and energy into fostering a grant-seeking culture on their campuses to take full advantage of external funds, as well as assessing how their institution might identify unique strengths that can be leveraged to deliver heightened, reliable revenue streams.

RELATED READING

- **The 2022 State of Alumni Giving Report**, which offers insights into alumni donor characteristics, their top motivations to give, and engagement preferences
- **6 Alternative Budget Models for Colleges and Universities**, a blog post with an overview of practices that include centralized, incremental, and performance-based budgeting
- **Drive Enrollment with Cross-Departmental Collaboration**, a guide for helping departments combine their expertise to address challenges and maximize results
- **Building Strong Grant Collaborations**, a webinar focused on ways to build effective collaboration and teamwork to develop competitive proposals



Explore effective strategies to expand your institution's grant funding portfolio. **Watch our webinar on Diversifying Grant Funding Sources.**



SPOTLIGHT: Unity College

Unity College, a private liberal arts institution in Maine, focuses on environmental and sustainability programs. The college leverages its strengths and assets to supplement revenue in ways that align with its institutional mission, such as:

- ▶ Growing produce for campus use on the campus farm
- ▶ Renting campus greenhouse space to local farmers for seedlings
- ▶ Selling produce, plants, gardening tools, lawn ornaments, and crafts at its farm stand
- ▶ Offering horticultural workshops to the public
- ▶ Catering weddings and funerals through the campus dining services
- ▶ Selling ketchup and hot sauce made from campus-grown tomatoes
- ▶ Renting space at the performing arts center to bands and community theater organizations
- ▶ Renting overnight accommodations at its historic lodge, log cabins, and homes at its Sky Lodge campus
- ▶ Customized workforce training and upskilling for mission-aligned businesses and employers

Source: Unity College



TREND 4: INCLUSION AND SUPPORT SERVICES BUILD CONNECTION, ACCEPTANCE, AND SUCCESS

A strong link between student belonging and persistence drives institutions to ramp up diverse offerings in student-centered support and success services to ensure every enrollee is mentally, socially, and academically prepared for college life.

TREND 4: INCLUSION AND SUPPORT SERVICES BUILD CONNECTION, ACCEPTANCE, AND SUCCESS

TREND OVERVIEW

Students report mounting challenges with mental health, academic readiness, and life skills — concerns that escalated during the pandemic. By taking steps to reduce anxiety and roadblocks to success among all attendees, colleges and universities can foster a stronger sense of belonging and well-being on campus. These strategies may range from addressing basic needs to robust counseling and affinity groups that help individuals find their place among their peers and professors.

HOLISTIC SUPPORT FOR STUDENTS

Faced with a surge of mental health concerns among students, institutions continue to seek ways to provide acute and preventive services, resources, and activities to meet the needs of learners who may be in distress or at risk of disengaging. Some institutions

have focused on maximizing on-campus time to heighten student engagement, but for some students that can exacerbate other stressors — such as transportation costs, food insecurity, and childcare needs — that colleges and universities can help relieve via wrap-around support services.

To ensure equitable student success and retention, services should be culturally relevant, inclusive, affirming, and delivered through multiple modalities. And they could be nontraditional: Peer-supported mental health programs, for example, are becoming a more common option for students who might otherwise resist seeking help. Meanwhile, the elimination of race on college applications in some states has correlated with increased mental health challenges among diverse students at those institutions.



The percentage of college students who met the criteria for at least one mental health problem during the 2020–2021 school year



The percentage of community college students who are food insecure



The number of currently enrolled undergraduate students who report they have considered withdrawing from their program for a semester or more in the past six months



The percentage of students who have felt negatively singled out at their institution based on their identity

TAKE ACTION

Colleges and universities have long known that the transition to a campus environment can be a shock for some first-time students. By understanding new and evolving stressors that could affect students' well-being and academic performance — and, ultimately, their persistence — institutional leaders can identify and diffuse core problems early.

This is a large undertaking, and it isn't a one-size-fits-all approach. A collaborative review of core student needs in comparison to faculty and staff's capabilities to meet them is key to achieving a supportive, resilient community.

RELATED READING

- **5 Student Retention Strategies in Higher Education**, an infographic guide to delivering interventions that drive student success and completion
- **2022 National Admitted Student Survey**, which examines the application journeys and first-year expectations of admitted undergraduate and graduate students
- **Student Belonging: The Next DEI Frontier in Higher Education**, a blog post that explains the value of an accepting, inclusive campus culture — and tips to get started
- **2022 Higher Education Diversity, Equity, and Inclusion Survey**, a report showing how more than 1,000 undergraduate students view their institutions' DEI efforts
- **Supporting Students and Mental Health Needs in an Evolving Landscape**, a webinar featuring a roundtable panel with actionable strategies from organizational leaders



SPOTLIGHT: Ventura College

Ventura College in California recognized it was not meeting the needs of students in its English as a Second Language (ESL) program. Working with Hanover, the college conducted in-depth interviews with current and former students, faculty, and community members to identify enrollment barriers and support needs. From these insights, college leaders made changes to better support ESL students, including:

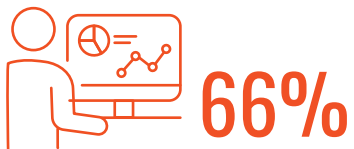
- ▶ A full-time bilingual staff member to provide dedicated support for prospective and current students, in collaboration with a team of ESL academic counselors.
- ▶ Multiple ways for students to connect with staff, including walk-in appointments, offsite events, phone, and video calls.
- ▶ A previously difficult online application is now a one-page paper application that can be completed in English or Spanish.
- ▶ ESL pathways have been reimagined to better serve students who want to learn English but are not interested in pursuing a degree.
- ▶ ESL coursework can be paired with vocational offerings for students who want career training.
- ▶ Students are formally recognized with certificates of achievement and end-of-term celebrations, and an annual ESL graduation ceremony is being planned.

Source: Hanover Research



TREND 5: INCREASED MARKETING SPENDING PUTS PRESSURE ON QUANTIFIABLE RESULTS

With higher education set to spend more on marketing in the coming year, institutions increasingly focus on how to quantify their marketing results.



The percentage of higher education marketers who are expected to report website or digital marketing metrics to leadership at their institutions



The percentage of higher education marketing departments that have a marketing analyst who performs data analysis and measurement activities



The amount colleges and universities spent on advertising in 2019

TREND OVERVIEW

Facing declining enrollment, increased competition, and diminishing public sentiment, college and university marketing departments are becoming more strategic with their brand and enrollment marketing efforts, employing some tactics and technologies that emerged from the corporate sector. Moving beyond traditional media or outreach, institutions are:

- Increasing their digital marketing budgets
- Adopting more sophisticated campaigns and analytics
- Leveraging the power of social media “listening” and influencers
- Developing innovative promotional and branded partnerships

A MEASUREMENT MENTALITY

These efforts, however, require significant financial investments, contemporary marketing acumen, and a strong understanding of how to measure return on investment. With estimated billions of dollars spent on advertising each year, colleges and universities increasingly expect their marketing leaders to demonstrate the value of their efforts and tie performance

metrics to increased conversion and yield rates. This means marketing departments must bring a measurement mentality to their practices to understand if they’re investing in the right channels to yield maximum results. That data can inform critical decisions such as whether to sustain enrollment management strategies or to shift course. Leaders must also examine the optics of their outreach to ensure that their new marketing spend isn’t widely perceived as wasteful or a detraction from key institutional priorities.

TAKE ACTION

Higher education marketing teams that establish strategic marketing goals, consistently track performance metrics, and use those measurements to refine campaign tactics and channels are poised to clearly articulate the value they bring to their institutions. Regularly reporting marketing results to internal stakeholders ensures that the entire campus understands the work that goes into promoting the institution’s brand value, safeguarding its public reputation, building engagement with prospective students, and nurturing interest down the enrollment funnel.

RELATED READING

- **Higher Education Brand Health 101 Guide**, a resource to track institutional brand health, understand stakeholder engagement, and gain a full picture of your performance
- **Tips to Bolster Your Institution's Messaging**, a blog post with advice for meeting students where they are – and compelling them to take the next step
- **2022 National Prospective Student Survey**, a report that examines the evolving needs and expectations of college-bound high school sophomores and juniors
- **Reshaping Recruitment Ahead of the Enrollment Cliff**, a webinar offering actionable strategies from higher education leaders to fortify enrollment and retention
- **NPS: The Most Important Metric Your Higher Education Competitors Aren't Using**, a blog post on using the Net Provider Score to boost recruitment, marketing, and fundraising



SPOTLIGHT: Northern Essex Community College (NECC)

In Massachusetts, Northern Essex Community College's 2021 Marketing Communications Strategic Plan focuses on two primary marketing objectives: to increase the public's awareness and understanding of NECC's value proposition and to increase connections, activity, and engagement (through visits, inquiries, leads, likes, and actions).

To effectively generate leads and engagement, the Marketing Communications team prioritizes hyper-targeted messaging, data-driven decision making, and outcomes assessment. Specific marketing investments include paid traditional advertising, paid digital marketing, paid social media advertising, promotional email, and earned media coverage.

To measure the return on these investments, the strategic plan states "all institutional promotional initiatives, as well as any stakeholder initiatives that receive Marketing Communications support, must be clearly defined with explicit objectives and metrics." The department continuously determines the effectiveness of its promotional activities by tracking data analytics such as:

- ▶ Website traffic patterns
- ▶ Social media visitor patterns
- ▶ Form submission results
- ▶ Email open rate results
- ▶ Link activity

Source: Northern Essex Community College



CONCLUSION

It's clear that colleges and universities understand they can no longer afford to focus exclusively on traditional models of learning, funding, and marketing. Many elements of the traditional higher education experience are undergoing major shifts as institutions seek to establish financial sustainability. College and university leaders are being called to examine new ways of promoting their brand while offering flexible, career-forward programming. They must also think creatively and strategically to find new sources of income to offset operating expenses and declining tuition revenue. And, as pandemic-related stressors continue to ripple through daily life, it's imperative to offer robust, inclusive support services that can help students thrive and persist.

EMBRACING CHANGE

Make no mistake: The core function of an institution hasn't changed. But colleges and universities are feeling an urgency to embrace alternative strategies and data-driven research to identify and solve systemic problems – not only for weathering today's challenges but also for securing their place as an appealing, competitive destination for years to come. By bridging longtime best practices with a close eye on current and future opportunities, institutions can be poised to seize this pivotal moment.



How will your institution build resiliency now to prepare for the future?

Find out how Hanover Research can help you make future-focused decisions with tailored research and data analysis.

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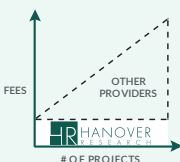
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Headquarters

4401 Wilson Blvd.
9th Floor
Arlington, VA 22203
(202) 559-0050

Charlottesville

609 E Market Street,
Suite 302
Charlottesville, VA 22902

