



TRENDS OUTLOOK 2022
A Transformative Time Ahead for Higher Education

As the world continues its post-pandemic recovery, calls to ‘Build Back Better’ have become a familiar refrain across governments, academia, businesses, non-profits and the public. On top of transforming to meet the needs of today’s students and tomorrow’s workforce, universities will play a vital role in creating the reimagined—and better—future for the world. The trends gaining momentum in 2022 certainly reflect the pressures that a dynamic higher education landscape entails.

Get ready to take on these 5 trends:

- Alphabet Soup for ActionTrend 1**
Several acronyms are appearing with increased frequency across the media landscape: SDGs, ESG & DEI. What do they stand for and how will their expanding influence impact universities?
- Lasting Financial Effects of the Global PandemicTrend 2**
Prolonged disruption, along with COVID-19 variants that continue to slow pandemic recovery, has led to economic challenges worldwide—and universities are not immune.
- More Reliance on Alternative Funding SourcesTrend 3**
With the financial hurdles ahead, this third trend—universities seeking out alternative funding—is no surprise. What may be surprising is how much the first trend in the list is influencing funding strategies.
- Blended Learning Gains Momentum—the Hybrid Campus, Micro-credentials & MOOCs.Trend 4**
Yet another trend influenced by the pandemic, the hybrid campus is going to grow exponentially.
- Making the Most of Big DataTrend 5**
With the shift to virtual learning environments and the growing focus on DEI, using data to address educational barriers will solidify as a long-term trend.

TREND 1:

Alphabet Soup for Action

Against the undercurrent of climate-driven crises and social justice issues that arose during or because of the pandemic, several acronyms are appearing with increased frequency across the media landscape: SDGs, ESG & DEI. What do they stand for and how will their expanding influence impact universities?

SDGs

Adopted in 2015, the United Nations **Sustainable Development Goals** (SDGs) cover 17 goals aimed at “achieving a better and more sustainable future for all.” From the beginning, the UN has emphasized that universities are critical collaborators, supporting progress on the goals through research, teaching, and leadership.

Late in 2020, the Sustainable Development Solutions Network (SDSN) echoed academia’s importance in the effort. With its release of a guide to help higher education institutions implement and expand education on the SDGs, the SDSN noted, “The need to greatly expand society’s capacity to solve complex challenges has never been more important or more urgent, with just ten years remaining to the 2030 deadline of achieving the SDGs, the growing understanding of the urgency of addressing climate change, and now the added challenges of managing the COVID-19 pandemic and its fallout.”¹

ESG

ESG refers to **Environmental, Social & Governance** factors that enable long-term business sustainability. The focus on ESG may have started within financial services and large corporates, but in recent years, ESG commitments have gained traction beyond institutional investors and multinationals. The reason? It’s not just investors and corporate boards driving organizations to balance purpose with profit. Students are tuned in to sustainability too. *The New York Times* reports that “Today, some of the most popular classes are about climate finance, impact investing and social entrepreneurship.”²

This is a significant shift from a decade ago, reflecting both the changing expectations and expanding ESG job market. Prior to 2020, Harvard Business School saw fewer than 300 students enroll in a social enterprise course. Last year, reports *The New York Times*, that



number more than doubled. As a result, universities will continue to expand curriculum related to ESG. “There’s been an explosion of interest from students,” said Todd Cort, a lecturer on sustainability at the Yale School of Management and the co-director of the school’s environment and business center.³

DEI

Diversity, Equity & Inclusion (DEI) are issues covered within the UN’s SDGs as well as falling under the “Social” scope of ESG. Over the past 24 months, however, the pandemic and civil unrest have pushed DEI into the spotlight on campuses around the world.

As universities tackle issues of diversity, equity and inclusion from within, it is clear that in 2022 and beyond, higher education will also be called to leverage advanced research and data analytics to further progress on SDGs, ESG and DEI.



Realities of environmental waste and social inequity have been brought to light through our collective crisis, and there may be a stronger will now than in recent years to pursue aggressive new policies and sustainable practices to address these issues. Institutions will be critical partners in this pursuit of a more sustainable future, through both curricula and operations that raise awareness of and support the importance of sustainability.”⁴

TREND 2:

Lasting Financial Effects of the Global Pandemic

Prolonged disruption, along with COVID-19 variants that continue to slow pandemic recovery, has led to economic challenges worldwide—and universities are not immune. Two of the biggest financial issues that universities currently face are funding shortfalls and shifting student populations.

Funding Shortfalls

While institutional finances didn't experience an immediate hit during the COVID shut-down in EU nations where government funding is substantial, universities that rely more on tuition and campus living revenue, such as those in the US and Australia, saw significant shortfalls that led to layoffs. What's more, consulting experts project that universities worldwide will experience ongoing economic uncertainty. "The likelihood is that there will be a long, slow squeeze on institutional finances in many countries," writes Alex User on the Higher Education Strategy blog.⁵ For higher education institutions in countries with substantial government funding, for example, funding is likely to decline or remain stagnant while countries grapple with higher debt loads.

Shifting Student Populations

Meanwhile, student populations look different than in the past, which also has a fiscal impact. International student enrollment at US universities, for example,

declined by 15% in 2020-2021 and failed to make up much ground for the 2021-2022 academic year due to on-going travel restrictions. Brexit is also having an impact on international student enrollment in the UK according to *University World News*. British universities saw a **56% drop in EU applicants** last year when the Brexit deal and transition went into effect.⁶ As a result, universities in The Netherlands are poised to gain more EU students while UK universities look further afield to Asian nations for international students.

Simultaneously, non-traditional students are altering campus dynamics as well. The 2020 World Economic Forum "Future of Jobs" report estimated that 50% of all employees will need reskilling by 2025 as the "double-disruption" of the economic impacts of the COVID-19 pandemic and increasing automation transforming jobs takes hold.⁷ Universities will need to adapt curriculum and teaching methods to reach the growing number of individuals returning to academia to meet the digital, data-driven future of employment.

TREND 3:

More Reliance on Alternative Funding Sources

With the financial hurdles ahead, this third trend—universities seeking out alternative funding—is no surprise. What may be surprising is how much the first trend in the list is influencing funding strategies.

Whether it's a capital campaign, private/alumni donor outreach or corporate collaborations, SDGs, ESG, and DEI are quickly becoming catalysts for giving. The Black Lives Matter movement, for example, increased donor interest in racial equality, yielding noteworthy multi-million dollar gifts to historically Black colleges in the US in 2020 and 2021.

To attract more corporate donors, universities will also look for ways to use a shared purpose—either in preparing students to be the workforce of the future or in moving the needle on SDGs and DEI goals. By partnering with companies on mutually-beneficial missions, universities can secure needed funding and collaborate on research and advanced data projects that make a difference.

TREND 4:

Blended Learning Gains Momentum—the Hybrid Campus, Micro-credentials & MOOCs

Yet another trend influenced by the pandemic, the hybrid campus is here to stay—and it's going to grow exponentially. Prior to 2020, the global eLearning market was already experiencing massive annual growth. Market analysis suggests that global eLearning will maintain a 14.6% compound annual growth rate in the coming years, reaching a market value of nearly \$374 billion by 2026.⁸

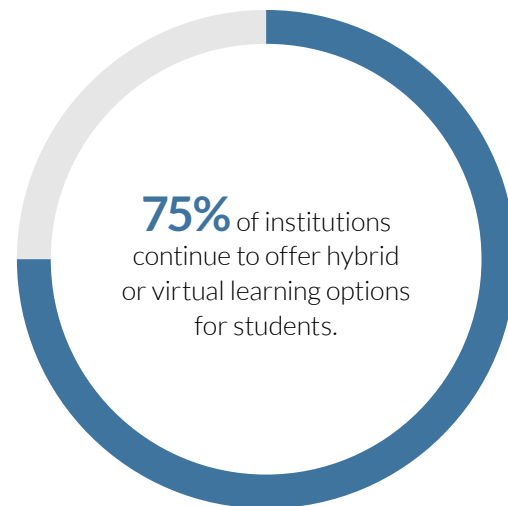
Just as the pandemic influenced widespread adoption of remote work, the social distancing mandates also increased reliance on virtual learning. The European University Association (EUA), which represents more than 800 universities and national rectors' conferences in 48 European countries, reports that 75% of institutions continue to offer hybrid or virtual learning options for students.⁹

Continued investment is a must to engage both traditional and non-traditional students. "With near universal access to digital devices and the internet, students will seek from colleges the same things they are getting from the music, movie and newspaper industries," write Levine and Van Pelt.¹⁰ "As they do with those industries, students will seek accessible, convenient and personalized education that fits their circumstances. College and universities will increasingly have to unbundle their programs and services so students can purchase at affordable prices only what they need or want to buy," they continue.¹¹

Levine and Van Pelt also project that increased need for upskilling or reskilling in the wake of digital transformation will encourage universities to expand their offerings beyond traditional degree programs. Short courses, professional certifications and micro-credential programs will make steady gains in both Europe and the US.

The European Commission has already created a consultation group to explore how to boost recognition of micro-credentials for further studies and employment. In addition, 53% of EU institutions report a growing demand for online learning for non-degree purposes that earn certificates, micro-credentials or badges.¹² Meanwhile, nearly 40% of US higher education institutions indicated that micro-credentials and other alternative certifications are effective at competing against disruptors in the education market, including new players offering bootcamps and massive online open courses (MOOCs).¹³

These programs have the potential to become a lucrative revenue model for universities, considering that the micro-credential market is expected to double over the next three to five years. More than that, the affordability of these popular programs promote diversity, equity and inclusion and offer the kind of flexibility that adult learners looking to reskill or upskill while still working need.





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are leveraging student data to explicitly address performance gaps.

TREND 5:

Making the Most of Big Data

Learning analytics were identified as an emerging trend in 2018, however with the shift to virtual learning environments and the growing focus on DEI, using data to address educational barriers will solidify as a long-term trend. There's definitely room to grow.

While 2021 Horizon Report found that 80% of universities use student data, only 40% are leveraging student data to explicitly address performance gaps. Beyond supporting greater diversity and equity in academia, the use of learning analytics can also help universities address enrollment, retention and graduation declines experienced in recent years by keeping students more engaged.

AI-enabled, digital learning, research and analytics technology adoption will grow in 2022 too. As universities add data science degree programs and certifications to support in-demand, data-driven careers, they will need innovative tools that give students real-world experience. Universities will expand use of software-as-a-service and data-as-a-service solutions to achieve multiple goals, from democratizing data access to enabling academic research and analytics—anytime, anywhere.

Of course, unlocking the power of big data is not without its own hurdles. Librarians and other higher education stakeholders will need to address a variety of issues related to AI, text mining, and machine learning—from copyright compliance and data privacy concerns to an erosion of intellectual freedom.

Information and media literacy instruction will be an integral component of digitally-enabled research to better educate students on the potential for confirmation bias or information filtering that can skew data analysis.

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