The Fight to Be Chosen: A Dedicated Session for CIOs on the Higher Ed State of the Sector

How Ultra-Winners and Disillusionment are Changing Competition for Students, Staff, and Funding in Higher Ed

Strategic Advisory Services

Joining Us Today…

Meet Your EAB Presenters

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EAB

Education's Trusted Partner to Help Schools and Students Thrive

Your Imperatives Determine Ours

INSTITUTIONAL STRATEGY

Prepare Your Institution for the Future

Executive guidance rooted in research to support your strategic priorities

MARKETING AND ENROLLMENT

Achieve Your Enrollment and Growth Goals

Tailored partnerships powered by a recruitment ecosystem with unrivaled reach to enroll your future classes

STUDENT SUCCESS

Build a Student-Centric Campus

Technology trusted by 850 schools to retain, graduate, and empower more students

DIVERSITY, EQUITY, AND INCLUSION

Advance DEI on Campus and in Your Community

Technology, research, and bold initiatives to strengthen your DEI strategy and eliminate equity gaps

DATA AND ANALYTICS

Embrace Digital Transformation

Data and analytics solutions built for higher education to guide decisions and accelerate innovation

We partner with 2,500+ institutions to accelerate progress and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.

K12 • Community Colleges • Four-Year Colleges and Universities • Graduate, Professional, and Adult Programs • Employers

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1 **Ultra-Winners and Disillusionment Combine for Perfect Storm**

2 Market Consolidation Redefines Research Funding, Development Landscape

3 Undergraduate Non-Consumer Market Larger, More Reachable than Assumed

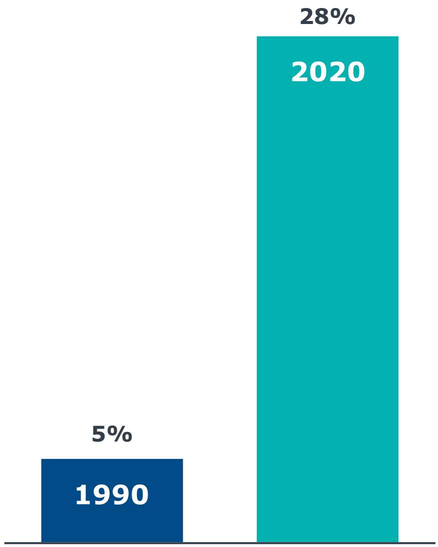
4 Talent Churn Requires Centralized Strategy

World Markets Dominated by a Few "Ultra-Winners"

Superstar Firms Consolidate Market Power During the Pandemic

Top 50 Firms Now Worth 30% of Global GDP

Stock Market Value to GDP Ratio



Trend Driven by Agglomeration, Strategies of Growth over Profit

Alphabet

+ more

Features of Ultra-Winner Firms

- Firms outspend competition, willing to **sacrifice short-term profit for long-term growth**
- Majority of profits come from a **handful of top-selling, highly scalable products**
- Firms focused on **consumer experience**
- Firms **begin expansion from position of dominance** in a smaller, unique market

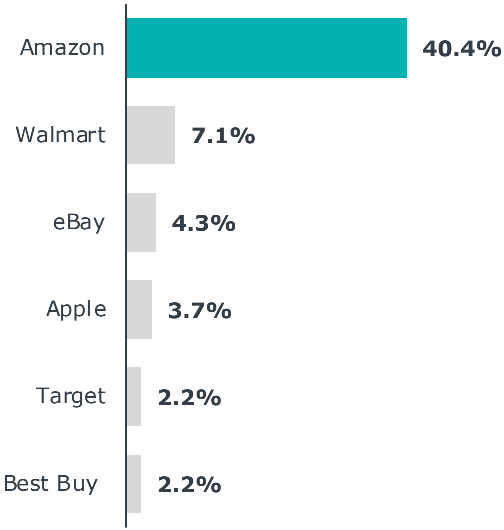
Source: Bloomberg "World-Dominating Superstar Firms Get Bigger, Techier, and more Chinese" May 2021 (link); Washington Post "How Big Tech got so big: Hundreds of acquisitions" April 2021 (link); EAB interviews and analysis.

Ultra-Winners Change the Game for Everyone

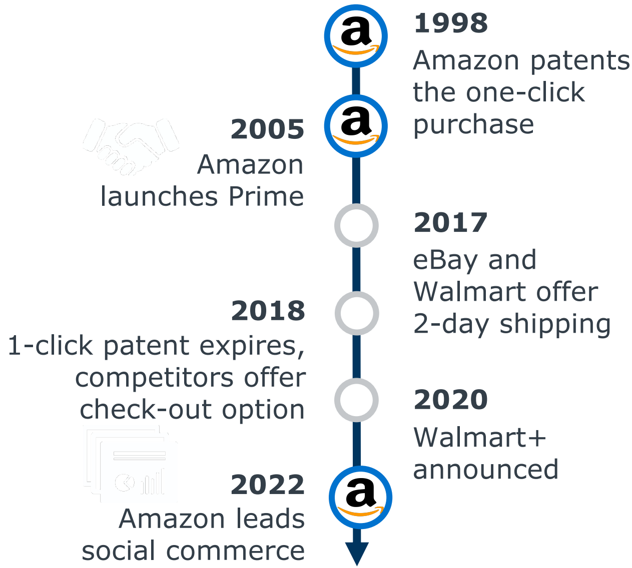
Ecommerce Industry Playing Catch Up to Amazon Innovations

Amazon Dominates the Ecommerce Industry….

Percent of total ecommerce sales, 2021



…And Their Convenience-Based Growth Strategy Shapes the Market



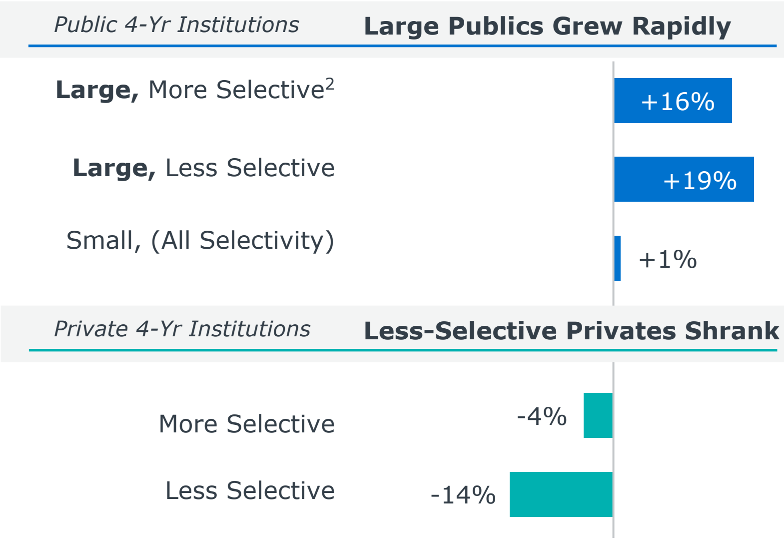
Source: "Top 10 US Companies Ranked by Retail Ecommerce Sales" eMarketer 2022 (link); EAB interviews and analysis.

How the Run to Scale is Manifesting in Higher Ed

Tracking the Flight to Size and Selectivity

Pandemic Accelerated UG Enrollment Flight to Large and Selective Institutions

Pct. Change in UG Enrollments[1], 2012 to 2020



Concentrated Growth in Research, Endowment Funds

$27.6B

In federal research funding was allocated **to the top 50 institutions in** FY2020 (compared to $18.5B for all other institutions)

19%

Of institutions hold 83.7% of all endowment assets[1]

1) Of institutions that responded to a national survey

Source: IPEDS Fall Enrollment and Admissions Data 2012-2020; Higher Education Research and Development (HERD) Survey, FY11-FY20; Whitford, Emma, "College Endowments Boomed in Fiscal 2021," *Inside HigherEd,* Feb. 2022; EAB interviews and analysis.

The Great Opt-Out…Broadcast in Real Time

Disillusionment with the Status Quo Produces Widespread Disengagement

236M **Views on TikTok** for #quitmyjob

52% Gen Z and Millennials likely to **consider changing employers** this year

21% Segment of population **not working, not in school, and not looking for work**

> "It's like **the whole country is in some kind of union renegotiation**. I don't know who's going to win…but right now it seems like workers have the upper hand."
>
> *Betsey Stevenson*
> *Economist, University of Michigan*

Source: @faaresq, Oct 19 2021, "Why Everyone is Quitting their jobs! #jobs #quitting #jobshortage #work #opportunity #learnontiktok" [Video]. TikTok. EAB analysis of 2020 American Communities Survey data; "2022 Annual Work Trend Index Report: Great Expectations: Making Hybrid Work *Work*," Microsoft; : Casselman, B., 3 Nov 2021, "The Economic Rebound is Still Waiting for Workers," The New York Times; EAB interviews and analysis

Unlocking the Advantage of Scale

Centralized Strategy, Cabinet Buy-In Essential to Keep Pace

Research

Research differentiation, over breadth, the standard for success in a new hub and spoke model

Enrollment

Large institutions join mega-universities in betting on—and winning—in online graduate market, but **undergraduate opportunities** lie in **nonconsumption**

Campus Experience

Interconnected talent, well-being challenges require integrative, top-down strategy

During this Session, We Will Share

1. Data analysis of rapidly-shifting markets
2. Intel on identifying nonconsumers of higher education
3. Case profiles of successful institutions

Beyond Today's Agenda

Dedicated Support for Our Partners' Evergreen Priorities

Research and Services Available:

- Achieving Financial Sustainability
- Advancing DEIJ
- Digital Transformation
- Academic Program Innovation
- Growing Student Success
- Reimagining Campus Space

Introducing EAB's DEIJ Institutional Strategy Index

A data-informed, guided collaborative approach allowing institutional participants to:

Comprehensively and **objectively evaluate current state** of DEIJ efforts against best practice

Create a **prioritized roadmap of investments** to close the most critical equity-related gaps first

33 **Discrete activities** required to close equity gaps **measured for maturity**

Market Consolidation Defines Research Funding, Development Landscape

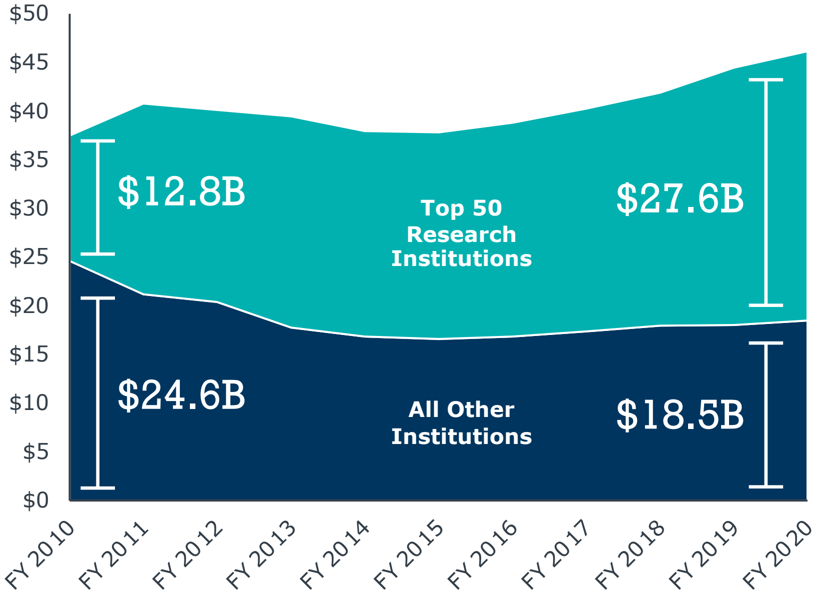
Common Misconceptions		Emerging Realities
Research funding is competitive, but attainable for most	▶	**Research Funding Increasingly Winner-Take-Most**
Federal funding supports and sustains the research enterprise	▶	**Institutions Must Pay Out of Pocket to Be Successful**
Research development stems organically from Principal Investigators	▶	**Research and Funding Flows Through Hub and Spoke Model**

To the Victors (aka the Biggest), Go the Spoils

A "Winner-Take-Most" Dynamic Emerges in Federally Sponsored Research

Federal Research Market Share of Top 50 Institutions Doubled Over Last 10 Years[1]

In Billions of Dollars, FY 2010-FY 2020



Primary Drivers of Research Consolidation

Skewed federal spending on applied research in defense and health sciences

Poaching and concentration of leading research talent

Investments in core facilities and research infrastructure

Surge in institutional-funded research

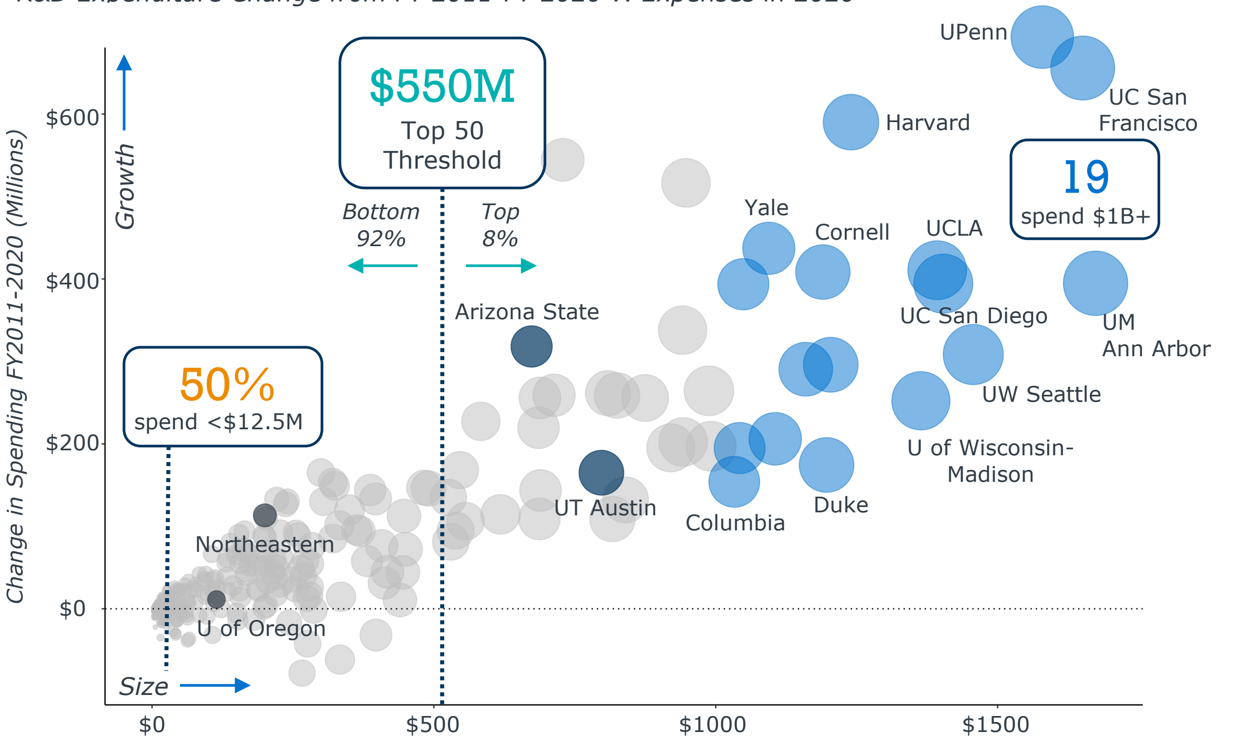
1) Adjusted for movement in and out of the Top 50. Since 2010, 43 of the Top 50 have been constant.

Source: Higher Education Research and Development (HERD) Survey, FY11-FY20; EAB interviews and analysis.

The Age of Research Giants

Size Begets Size as Large Institutions Capture Outsized Growth

R&D Expenditure Change from FY 2011-FY 2020 v. Expenses in 2020[1]



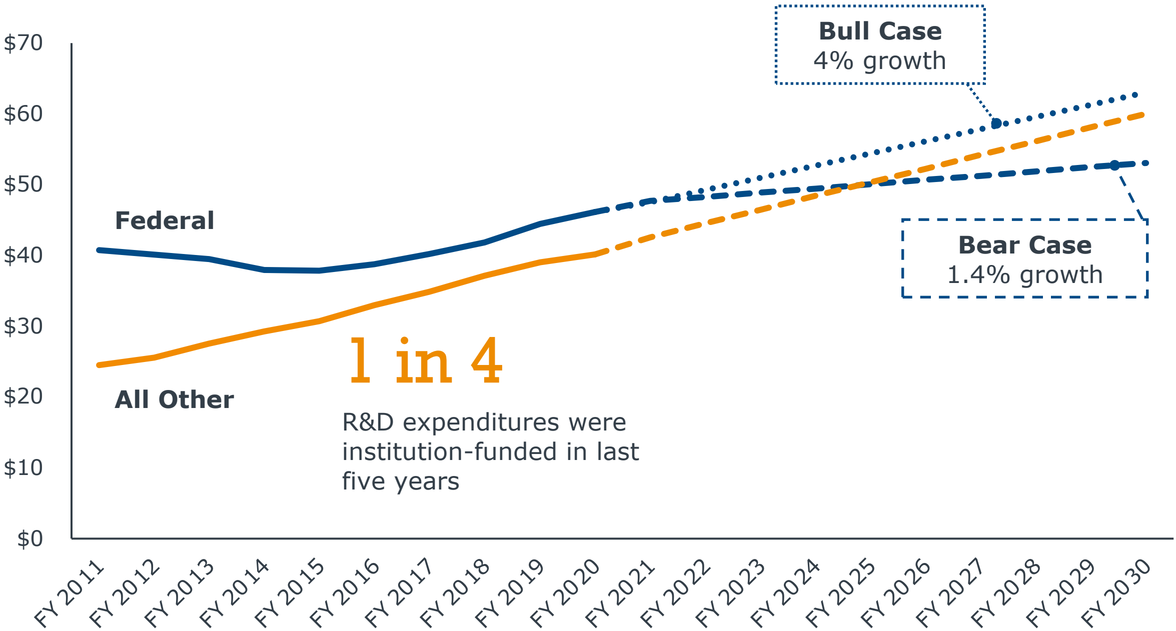
1) Johns Hopkins is not displayed as the Applied Physics Lab adds $1B to it is expenditures, placing it off the scale.

Source: Higher Education Research and Development (HERD) Survey, FY11-FY20; EAB interviews and analysis.

Higher Ed Set to Fund Greater Share of Research

Federal Research Expenditure Growth Outstripped by All Other Sources[1]

In Billions of Dollars, FY 2011-FY 2030 (Projected Using Average Change Over Time)



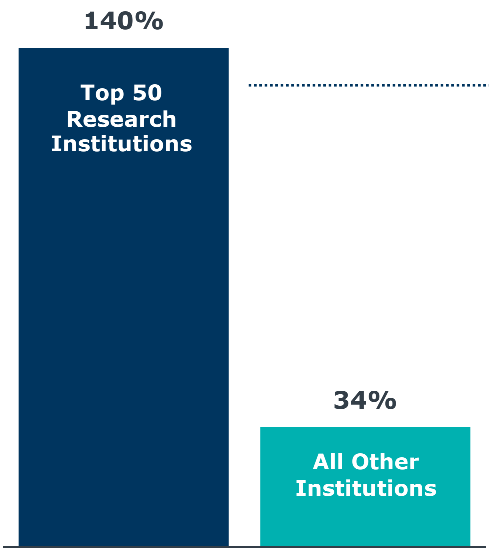
1) All other sources include institutional, state & local, industry, and nonprofit funding.

Source: Higher Education Research and Development (HERD) Survey, FY11-FY20; EAB interviews and analysis.

Research Increasingly a "Pay to Play" Game

Arms Race in Institutional Funding Powers Top 50 to Massive Size

Institution Funded R&D Expenditures
Percent Change from FY 2011-FY 2020



Severe Self-Funding Chasm Has Formed

Arizona State University

$104M *In 2011* → $250M *In 2020*

Duquesne University

$7.2M *In 2011* → $9.6M *In 2020*

Source: Higher Education Research and Development (HERD) Survey, FY11-FY20; EAB interviews and analysis.

A Familiar Hub and Spoke Model

Consolidation of Federal Dollars to Centers of Funding Push Rest of Industry to Secondary Markets

The Research Hub and Spoke In Practice

Multi-Institutional Funding Model Being Deployed by Federal Agencies

Receives grant, leads and coordinates research

BOSTON UNIVERSITY

Name Brand Recognition

Record of Funding Success

Deep Institutional Pockets

High Administrative Capacity

Physical Research Infrastructure

Renown Faculty

Hub

Subgrant

UNIVERSITY OF MICHIGAN

Spoke

A true peer partner brings nationally respected experts with track records of funding success

Subgrant

FIU

Spoke

A specialized partner possesses a specific designation, piece of equipment, or technical expertise

Subgrant

Argonne NATIONAL LABORATORY

Spoke

A non-university partner offers expertise, technical support, or information dissemination networks

Source: Argonne National Laboratory, Lemont, IL; Boston University, CELL-MET; Columbia University, New York, NY; Florida International University, CELL-MET; National Science Foundation, ERCs; EAB interviews and analysis.

Discussion
Chat In

How important is “spoke” research at your institution? Is IT able to discover and support this mode of research?

Why Change the Model Now?

Upending 75+ Years of Science Funding Policy

	Legislators Want…	Hubs Provide…
Better Bang for Their Buck	A greater return on federal funding	Increased likelihood of success based on track record
Easier to Manage	Better deployment of limited agency resources	Centralized distribution of more funding over more time to fewer institutions
Diffuse the Risks	Better protection against foreign interference and non-compliance	Stronger coordination in compliance and oversight of research operations

Not the End of the "One, PI, One Grant" Model

Individual investigator awards comprise the majority—for now—but "hub and spoke" model increasingly common for large grants

Source: EAB interviews and analysis.

Undergraduate Non-Consumer Market Larger, More Reachable than Assumed

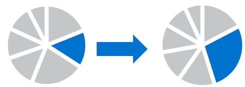
Common Misconceptions		Emerging Realities
Non-Consumers Aren't Interested in or Cut Out For College	▶	**The Majority Want to Enroll, But Face Addressable Barriers**
Non-Consumers are a 'Hidden' Population that is Hard to Reach	▶	**Many Non-Consumers Are Already in Your Databases**
Serving Non-Consumers Requires Unsustainable Aid	▶	**Process & Outreach Redesign Have Outsized Impact on Enrollment**

Winning in an Era of Demographic Decline

How Our Research Agenda Has Evolved to Help Partners Sustain Growth

Grow Market Share

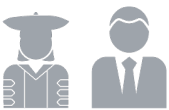
EAB's 2021 Research



63% Of enrollment changes explained by market share

Grow in "New" Markets

EAB's Ongoing Research



Adult & Graduate

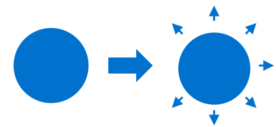
1.6% Annual growth in grad. degree conferrals 2017-20

-11%

Decline in projected college enrollments, 2025 – 2030

Expand the Market

Today's Discussion

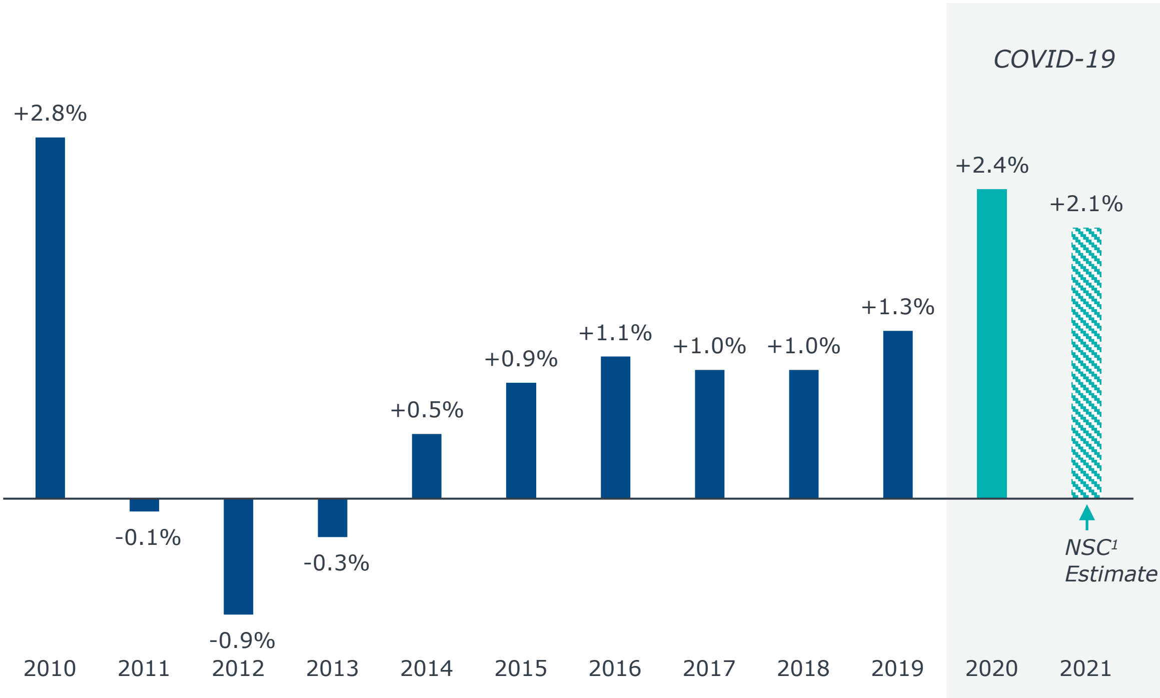


32% Of 18-24-year-olds graduate HS, don't enroll in college

A Major Boon for Graduate Enrollments

Graduate Enrollments Grew at Fastest Rates in Nearly a Decade Through Pandemic

Year on Year Growth of Total Graduate Enrollments – All 4-Year Institutions



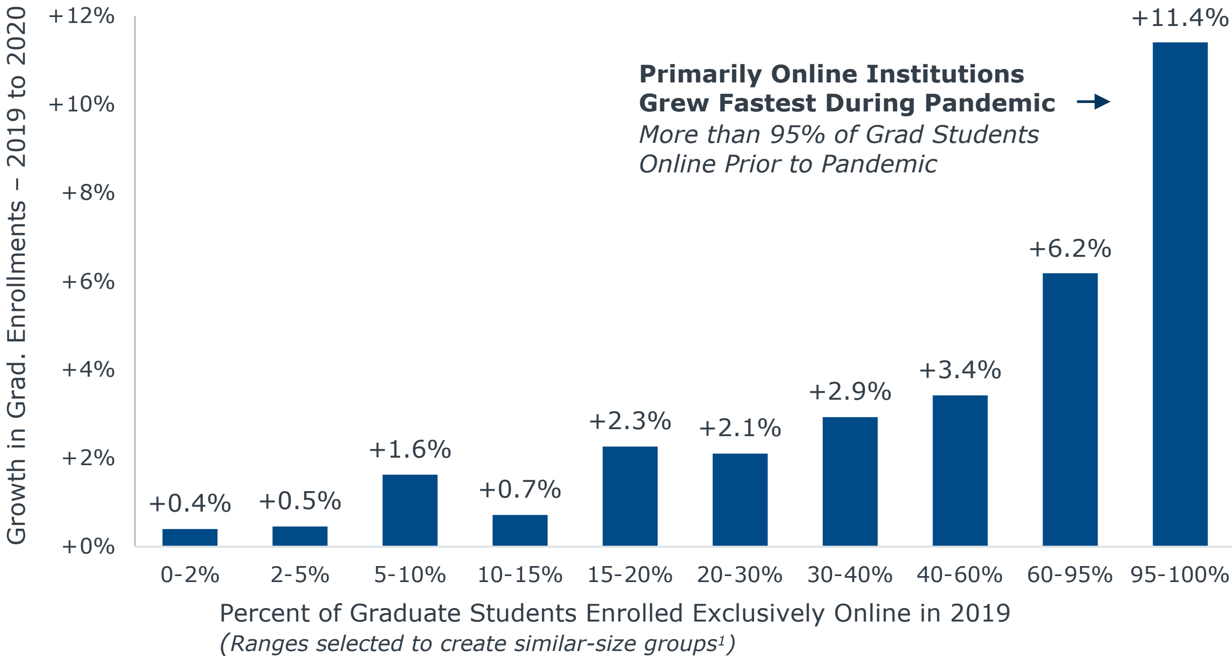
1) National Student Clearinghouse

Source: EAB analysis of enrollment data from IPEDS Fall Enrollment Surveys 2010-2020, 'COVID-19 Stay Informed: Fall 2021', National Student Clearinghouse, Nov. 18, 2021; EAB interviews and analysis.

More Pre-Covid Online Offerings = More Growth

Grads Flocked to Established Highly-Online Institutions in 2020

Growth in Graduate Enrollments 2020 vs. 2019 by Online Intensity in 2019



1) Each group is comprised of institutions that enrolled approximately 300,000 graduate students in 2019
2) We excluded institutions that enrolled zero graduate students in 2020

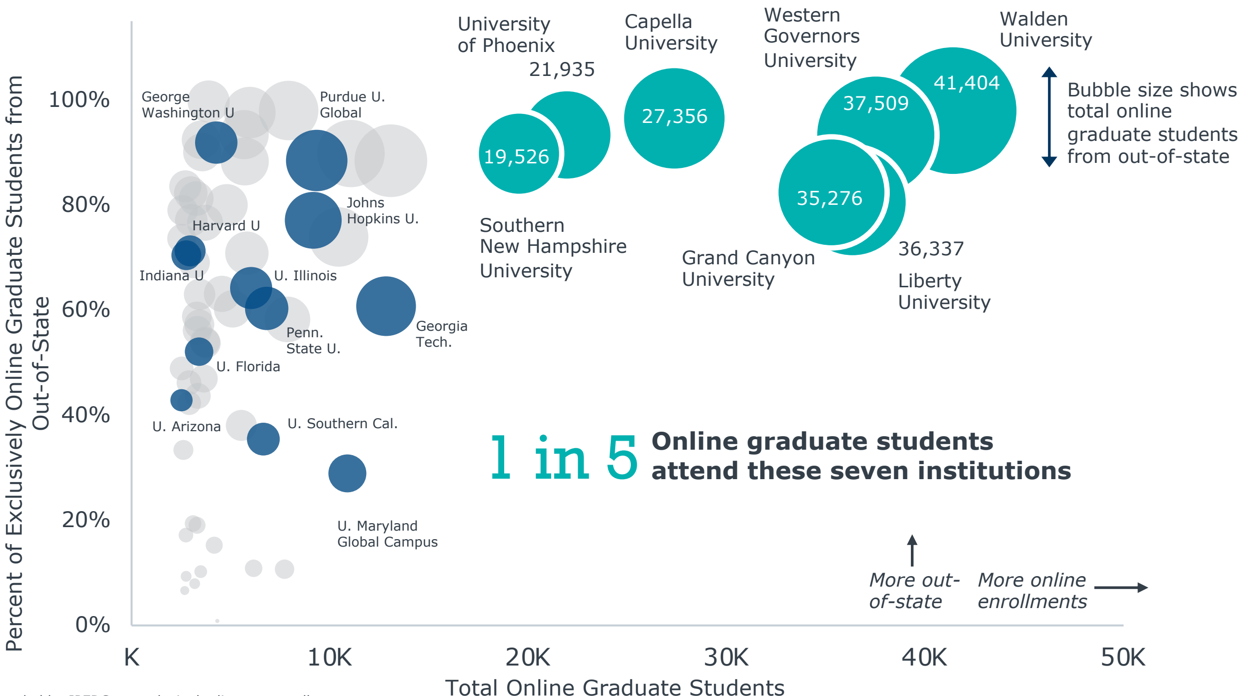
Source: EAB analysis of distance enrollment data from IPEDS Fall Enrollment Surveys 2012-20202; EAB interviews and analysis.

Newer Giants Loom Over Online Grad Market

But Many AAU Universities are Not Far Behind

Institutions With More Than 2,500 Exclusively Online[1] Graduate Enrollments, Fall 2019

Total Exclusively Online Graduate Enrollments and Percent From Out-of-State



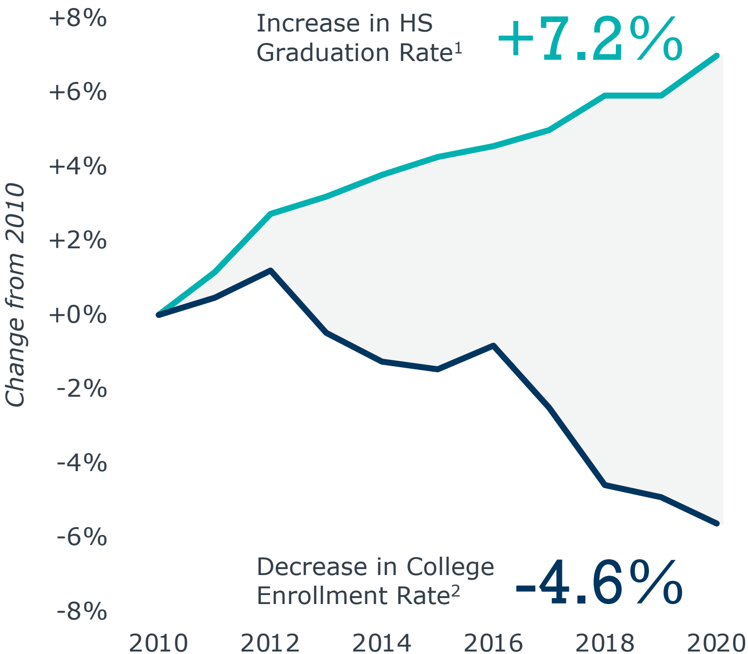
1) Recorded by IPEDS as exclusively distance enrollments.

Source: EAB analysis of distance enrollment data from IPEDS Fall Enrollment Survey 2019.

Your Biggest Competition May Be No Institution

The Non-Consumer Market is Getting Bigger Every Year

Change in Ed. Attainment at 19 (2010 to 2020)



Pandemic to Increase Nonconsumption

Short-term Disengagement

+2.3M

Increase in **Absent Students** Grades 8-12

17%

Of seniors **abandoned college plans**

Long-term Barriers

25%

Of 3rd graders behind in reading **catch up** by end of HS

1) Pct. Of total 19-year-olds who have graduated HS
2) Pct. Of HS graduates who have some college experience at age 19

Source: EAB Analysis of American Community Survey Data, McKinsey and Co. (2021), "COVID-19 and education: The lingering effects of unfinished learning"; EAB interviews and analysis.

Nonconsumption Market Often Met With Skepticism

Not Our Students

"This is not really a population that our institution is designed to serve"

Uninterested

"From what I've seen, these people don't want to be in college"

Hard to Reach

"It would be a major investment—in time and resources—to even locate these students"

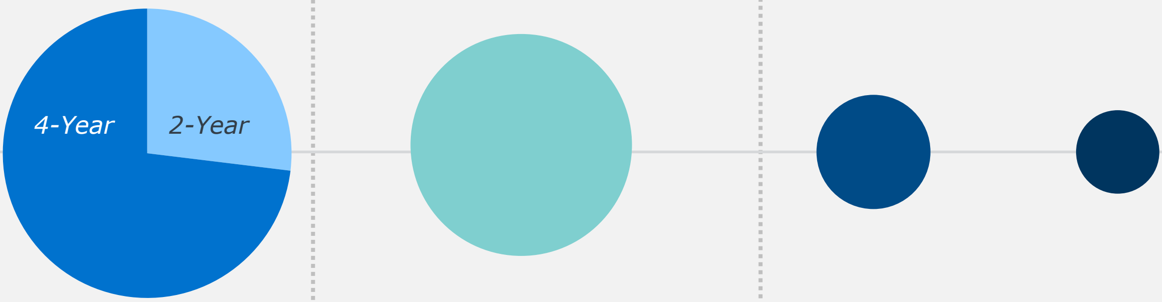
Too Big to Ignore

Sizing the Nonconsumption Market Opportunity

10.9M
Undergrads (2- and 4-Yr) 18-24 Years Old

4.2M
Adult UGs 25+ Years Old

3.1M
All Grad Students



8.3M **18-24-year-old Non-Consumers**

32% Of total 18-24-year-olds

Source: EAB Analysis of American Community Survey Data, NCES Digest of Education Statistics, Tables 303.50, 303.70; EAB interviews and analysis.

Nearly Six Million Warm Leads

For The Vast Majority of Non-Consumers, Perceived ROI Isn’t the Barrier

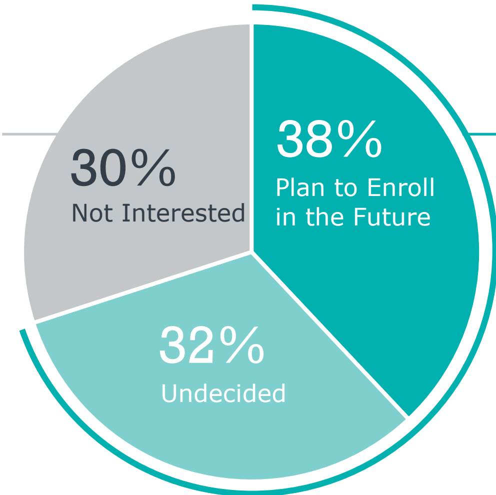
“Do You Plan to Enroll in College In the Future?” (18-24-Year-Olds Not in College), 2021

A ‘Hard No’ from a Few

2.5M

Not attending because:

- “College is a waste of money”
- “I don’t need a degree to get a good job”



But Most are Open to College

5.8M

Not attending because:

- “Working full-time”
- “Disruption/uncertainty from the pandemic”
- “Couldn’t afford it”
- “Don’t know what to study”

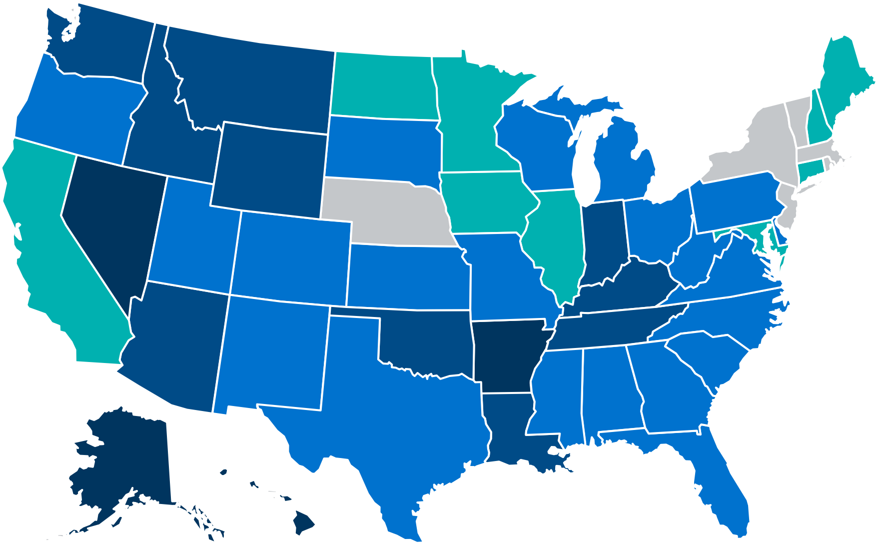
1) Online survey conducted by Intelligent.com of 1,250 Americans 18-24 not currently enrolled in higher education, Jan. 2022.

Source: EAB Analysis of American Community Survey Data; Intelligent.com, “1 in 3 Recent HS Grads Skipping College Because It’s a ‘Waste of Money’”, Feb. 1, 2022, (link) ; EAB Interviews and Analysis.

Nonconsumption a Nationwide Phenomenon

Nonconsumption Higher than 20% In All States, But Exceeds 40% In Some

Percent of 18-to-24-year-old high school graduates with no college experience, 2020



- Nonconsumption more common in areas with lower peer, parent educational attainment
- States with more poorly-ranked K-12 schools have larger non-consuming populations

20-25% | 25-30% | 30-35% | 35-40% | 40%+

Source: EAB analysis of American Communities Survey data; EAB interviews and analysis.

Non-Consumers Are More Familiar Than You Think

What are Non-Consumers Doing?

Living at Home

60%

Live with parents or grandparents

Not Starting Careers

1 in 3

Not working[1]

What are They Like?

Similar in Income to College Bound Peers

$77K

Median HH Income for Non-Consumers

$86K

Median HH income for College Goers

Racially, Ethnically Diverse

16%

Black/African American[2]

27%

Hispanic

48%

White[3]

Majority Male

59%

Male

Most Want to Attend College, But Experience Barriers

Quotes from HS grads choosing not to pursue college, Pennsylvania Senior Exit Survey 2020-2021

*"**I didn't want another year of online school**. Online school has taken a significant toll on my mental health."*

*"The college process was much harder than I thought. **I felt like I had no clue what I was doing**."*

*"My mom isn't working right now and **I'm worried about money**"*

1) Excludes those not working due to disability
2) Non-Hispanic population
3) Non-Hispanic population

Source: Report, The School District of Philadelphia, Oct. 2021, (link); EAB analysis of American Communities Survey data; EAB interviews and analysis.

The Non-Consumers in Your Backyard

Summer Melt Drives Nearly a Quarter of Nonconsumption

21-25%

Of 8.3M non-consumers

- ✓ **Applied**
- ✓ **Accepted**
- ✗ **Didn't Enroll**

253K - 310K

Seniors Accepted, but Not Enrolled Each Year, 10% of First-Time Attendees

Estimated[1] for Pre-Pandemic years

Majority of Non-Consumers are Recent Applicants

61%

Of 18-24-year-olds who had never attended college before said they **applied to college in the past year.[1]**

1) Estimated by applying HSLS proportions to estimates of HS graduates and estimates of college enrollment in 2020
2) ACS Estimates for 2020

Source: NCES, High School Longitudinal Study of 2009, 2013 Update, (link); WICHE, Knocking at the College Door 10th Edition, 2020 (link); EAB Analysis of Community Population Survey data; IPEDS Fall First-Time Enrollment Figures; EAB Analysis of the 2020 American Community Survey; Intelligent.com, "1 in 3 Recent HS Grads Skipping College Because It's a 'Waste of Money'", Feb. 1, 2022, (link); EAB Interviews and Analysis.

How Progressive Institutions Are Closing the Gap

Four Key Steps in Identifying and Enrolling Non-Consumers

1 Locate Your Nonconsumption Population

Invest in data-sharing and K-12 partnerships to size local market

2 Identify Your Competition

Explore labor market data, CBO[1] intel to identify what students are choosing instead of you

3 Appeal Directly to Non-Consumers

Craft program portfolio and student experience with these students at the center

4 Eliminate Legacy Barriers

Deploy targeted support to streamline enrollment and reduce summer melt

1) Community-Based Organizations

Discussion
Chat In

How can IT help identify and attract nonconsumers?

Talent Churn—And Its Impact on Students—Requires Centralized Strategy

Common Misconceptions		Emerging Realities
Talent Crunch is Short-Term – Addressable with Compensation	▶	**Talent Shortages are a Long-Term Reality**
Recruitment and Retention Delegated to HR, Dept. Leaders	▶	**Talent Strategy Requires Leadership from the Center**
Impact of Staffing Shortages is Limited, Easily Addressable	▶	**Counselor Shortages Negatively Impact the Student Experience**

Pandemic Forces Give Higher Ed Whiplash

Talent Shortages force Shift From Cost-Containment to Asset Management

Labor as Our Biggest Cost Center

Focused on surviving early-pandemic revenue losses

"How can we encourage early retirement?"

"Where can we be more efficient?"

2020: Pandemic Scarcity

-11%

Workers in Higher Ed[1]

2022: The Great Resignation

"How can we attract talent?"

"How do we retain our people?"

Labor as a Strategic Asset

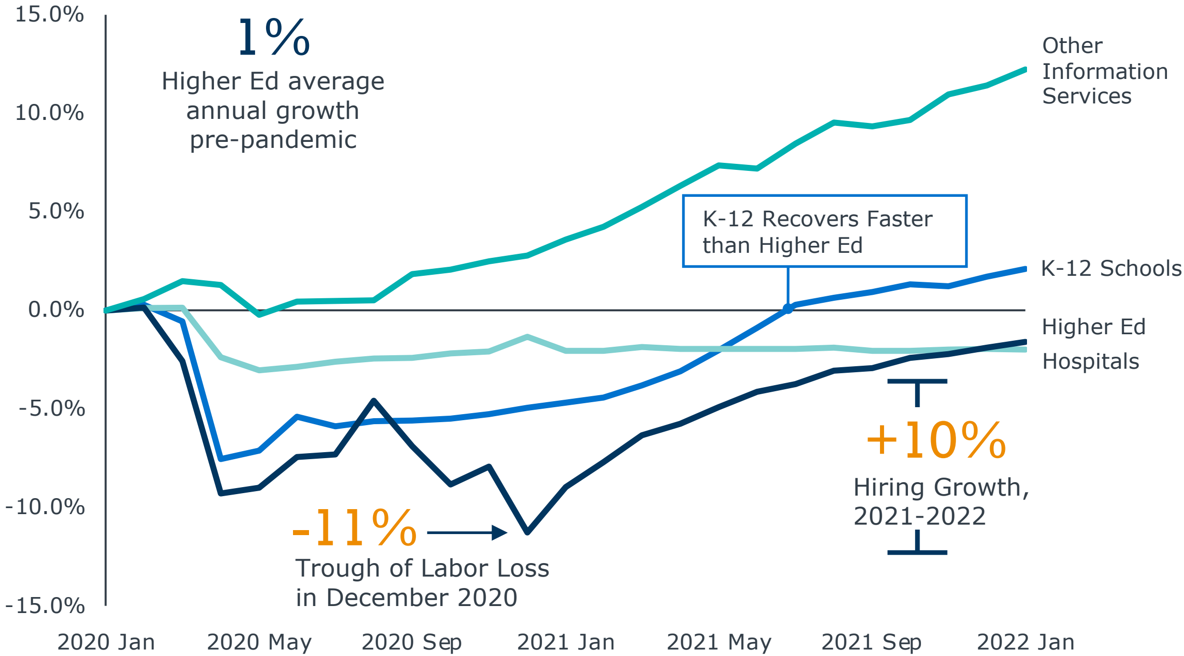
Growing your institution in an era of labor shortage, inflation, and competition

1) Estimated loss of workers in the college and university industry from January 2020-January 2021 (lowest employment level during pandemic)

Source: EAB analysis of the Current Employment Statistics Survey via the Bureau of Labor Statistics; EAB interviews and analysis.

Higher Ed Experiences Growing Pains

Historically High Hiring Growth Stresses Higher Ed HR
Percent change in total employees from January 2020, seasonally adjusted

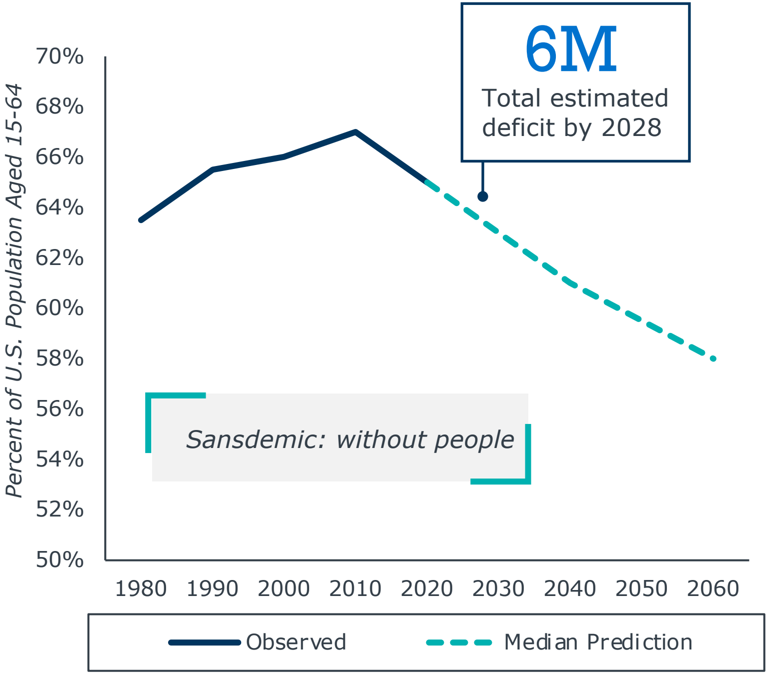


Source: EAB analysis of the Current Employment Statistics survey from the Bureau of Labor Statistics; EAB interviews and analysis

The Other Side of the Demographic Cliff

From Great Resignation to Great Sansdemic

Decline in working age population



Pandemic Losses Largely in On-Site, Lower-Level Jobs

Change in jobs from 2019-2021

- **-5%** Office/Clerical Staff
- **-4%** Service/ Maintenance Staff
- **+5%** Technical/Para -professional Staff

Forthcoming Wave of Losses Likely in Competitive Fields

40%

HR and IT employees at least "Somewhat Likely" to be looking for new work in 2022

Source: EAB Analysis of 2021 CUPA-HR data; "The Demographic Drought: Bridging the Gap in our Labor Force," April 2021, Emsi Burning Glass. "EDUCAUSE and CUPA-HR QuickPoll Results: The Misalignment of Preferences and Realities for Remote Work," *Educause Review*; EAB interviews and Analysis

Sansdemic Sets the Stage for Ultra-Winners

Early Market Signals Suggest a Prime Opportunity for a Select Few to Dominate

Leadership Turnover

Executive search experts predict HE leadership turnover rates of

50-60%

within next year (vs. 30% in typical year)

Talent Consolidation at the Top

Workforce Nationalization

22%

Of the workforce, or 36M workers will be remote by 2025

Larger Pool of Competitors

Market Immaturity

Higher ed recruitment practices, budgets lag behind private industry benchmarks

High Ceiling for Immediate Progress

Source: P.Basken, "US universities anticipating major leadership turnover post-Covid," *Times Higher Education*, July 2021; "Upwork Study Finds 22% of American Workforce will be Remote by 2025," *Upwork*, December 2020; EAB interviews and analysis.

Welcome to the Era of Employee as Customer

Recent History of the Employer Value Proposition on One Slide

Market Maturity

General Motors

Win on Stability

Win on Compensation

Win on Experience

- Employees seek a carefully curated workplace experience
- Candidates must be "sold" on value proposition
- Candidates seek diverse menu of benefits, beyond compensation

2010

Historic Market Churn Requires Employers to Win on Flexibility

AI-enhanced search sites make changing jobs easier

Remote work nationalizes the talent competition pool

Rising inflation lowers opportunity cost of not working

Pent-up turnover from pandemic career pauses produces greater churn

2022

Quantifying the Value Proposition

Put Dollars to Non-Cash Compensation to Showcase 'Perks' of Employment

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Total Compensation Calculator for University Staff and Faculty

- Cash Compensation

Gross Annual Income

$55000

- Employer Paid Non-Cash Compensation

Employer Paid Medical

$11454

- **Total Compensation**

$76897

+$22K
Compensation in addition to salary

Provide job candidates with a clear list of non-cash compensation that is:

1. **Easy-to-locate** from the job posting and **accessible in language and design**
2. Inclusive of **unique benefits** beyond healthcare
3. Written to show **value in commonly misunderstood or underappreciated benefits**

Explore the CU Calculator Here

University of Colorado Benefits Calculator (link); EAB interviews and analysis

Making Talent Center-of-Plate for the Board

Elevate Talent Strategy, Gain Unique Perspective from Board Braintrust

Ball State's Employee Development and Wellbeing Board Committee

BALL STATE UNIVERSITY

Formed in January 2022 as a compensation committee to inflect talent attrition

President expanded focus to include employee experience

Areas of focus include:

1. Talent acquisition and succession planning
2. Employee development and engagement
3. DEI
4. Annual demographic and compensation data reviews

Incorporate the Board's Out-of-Sector Expertise in Talent Strategy

How have other industries navigated talent shortages?

What does higher education need to learn from industry about retaining top talent?

Where is our institution uniquely positioned to win?

What value drivers of higher ed employment are currently underleveraged?

Source: EAB interviews and analysis

From Great Renegotiation to Org Transformation

How EAB Can Help Institutions Achieve Their Strategic Talent Management Goals

Winning the Great Renegotiation

- Implement high-impact tactics with proven ROI in the current labor market
- Customize compensation packages based on employee value and preference analyses

Sansdemic-Era Playbook for **Staff Recruitment and Retention** *(forthcoming)*

URGENT

Summer 2022

Becoming a Top Talent Destination

- Develop a data-informed understanding of competitive position as a local, regional, and global employer
- Use strategic employer branding to gain a competitive advantage

Employer Brand Diagnostic and Associated Toolkit *(forthcoming)*

IMPORTANT

Fall–Winter 2022

Maximizing Organizational Learning and Effectiveness

- Identify top barriers to continuous improvement and peak performance
- Redesign structures, roles, and processes to realize long-term goals (e.g., increased operational efficiency)

Proactive **Succession Planning** Guide and Interactive Workshop *(forthcoming)*

TRANSFORMATIONAL

2023 and Beyond

Source: EAB interviews and analysis.

Discussion
Chat In

Which of these areas will be most important in your organization’s talent strategy?

What resources could we provide to support you?

Unlocking the Advantage of Scale

Centralized Strategy, Cabinet Buy-In Essential to Keep Pace

Research

Research differentiation, over breadth, the standard for success in a new hub and spoke model

Enrollment

Large institutions join mega-universities in betting on—and winning—in online graduate market or gaining ground in the nonconsumer market

Campus Experience

Interconnected talent challenges require integrative, top-down strategy

Source: EAB interviews and analysis.

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