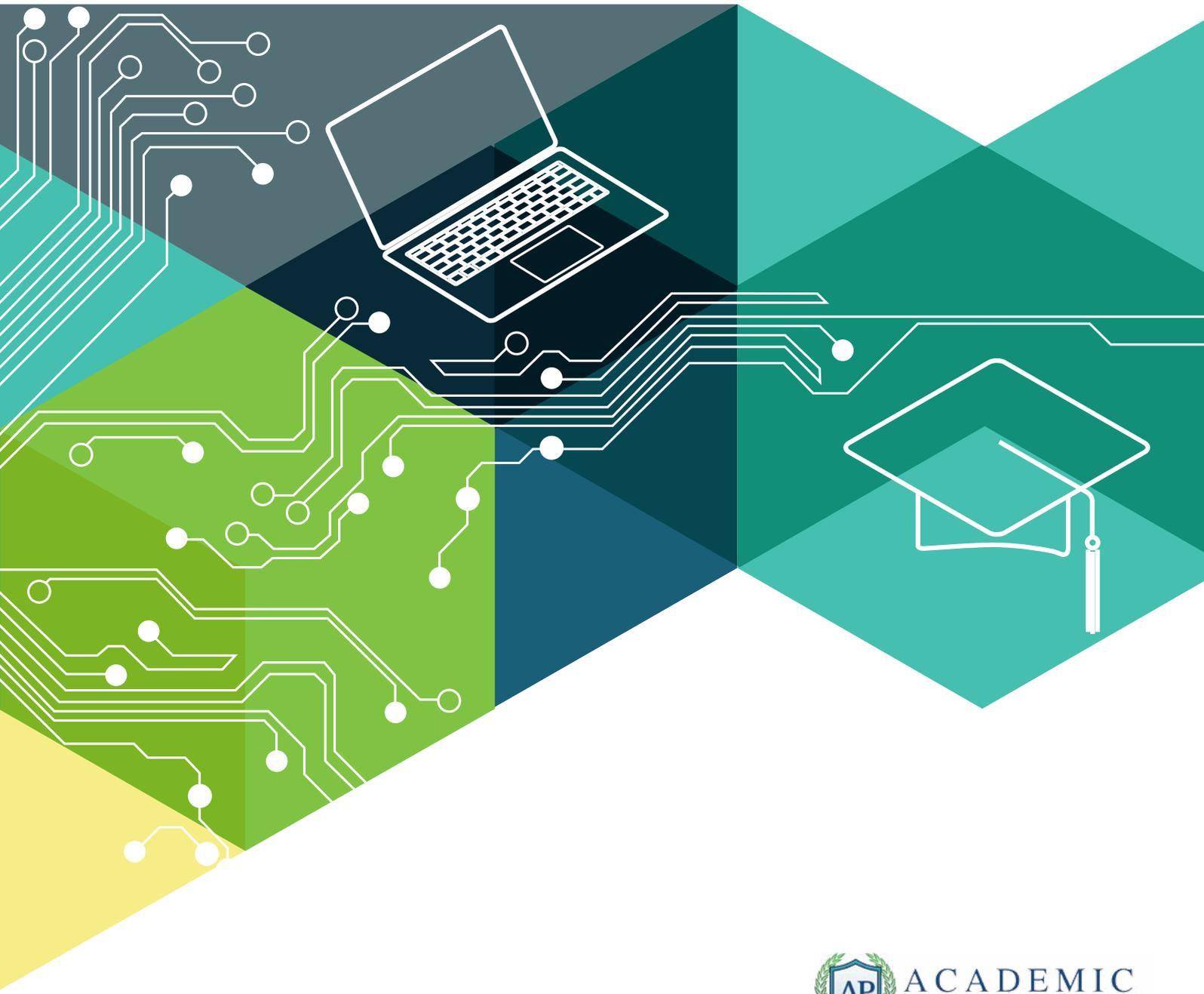


Higher education in the 21st century: Meeting real-world demands

An Economist Intelligence Unit research programme
sponsored by Academic Partnerships





About this report

Higher education in the 21st century: Meeting real-world demands is an Economist Intelligence Unit research report, sponsored by Academic Partnerships. Our thanks go to all survey respondents and interviewees for their time and insight.

The report was written by Lauren Barack and edited by Steven Mintz and Christine Emba. The findings and views expressed in the report do not necessarily reflect the views of the sponsor.

March 2014

About the survey

In September 2013 the Economist Intelligence Unit conducted a survey sponsored by Academic Partnerships of 317 higher education practitioners. The majority of respondents (51%) held teaching/faculty roles, followed by those in research (28%), administrative (27%) and management positions (26%). Of the institutions represented by the respondents, 52% were public, non-profit institutions, 33% were private, non-profit institutions, 12% were for-profit institutions and 2% comprised other groups, including institutions that had charity and public, for-profit status. Of the respondents, 36% hailed from North America, 33% from Asia-Pacific and 32% from Western Europe. ■



Contents

	Executive summary	2
	Introduction	4
1	Crossing geographic boundaries	6
	Springtime for Asia	7
2	Creative financing	8
3	The digital domain	10
	Georgia Tech's experiment	11
4	Conclusion: new avenues await	13
5	Appendix: survey results	14



Executive summary

As technology evolves and the financial climate shifts, the world of higher education is changing quickly and dramatically. In the US and the UK, tuition and fees are increasing while public funding for educational institutions is decreasing. Enrolment is also declining as sceptical students weigh the price of a degree against their odds of employment after graduation. Colleges and universities must look for ways to cut costs and uncover new revenue streams.

At the same time, however, an expanding global middle class and growing young adult populations are increasing the demand for higher education in the developing world, especially in key areas of research and vocational study. But as technology expands access worldwide, online institutions, open-source classrooms and virtual campuses will compete with traditional structures. Higher education may well move from the current producer-driven business model to one that is increasingly shaped by student and consumer demands.

To investigate the ramifications of these changes and identify the steps that institutions are taking to flourish and remain relevant in a new climate, The Economist Intelligence Unit, on behalf of Academic Partnerships, conducted a survey of more than 300 higher-education practitioners from around the world.

Key findings from the survey include:

- **Institutions are courting new student populations.** Global visibility has become a top priority for colleges and universities, with expansion abroad a key goal for many. Thirty-three percent of the higher-education institutions polled say they are increasing their recruiting of international students, targeting a rapidly growing global middle class. Fifty-one percent of institutions are “strongly to moderately” considering expanding abroad through physical campuses, online presences or other means. That said, competition to recruit and retain top students is heating up worldwide—well-funded institutions in developing nations, especially in Asia, are eager to hold on to their student populations.
- **Creative financing is needed to balance shrinking budgets.** Fifty-one percent of survey respondents say that reduced government subsidies have negatively or somewhat negatively affected their institutions’ financial standing; 40% cite the shrinking availability of research grants. Especially in the US and the UK, sustainability will depend on rigorous cost-cutting in tandem with finding new sources of revenue. Cuts in basic spending remain the first choice for higher-education institutions looking to balance their books, but 30% of respondents also state that partnering with private

enterprise is one of their top three strategies to counter funding declines. Raising tuition is also a common strategy, but doing so can have negative ramifications for students and schools.

- **Online learning is the new frontier.** Today's institutions of higher learning have high hopes for technology-based delivery of instruction. Massive open online courses (MOOCs) have both supporters and detractors, but 61% of survey

respondents say that they believe online and distance courses will have the greatest effect on how higher education is delivered in the next five years. One in four survey respondents expects online and hybrid courses to attract more students and bring more revenue to their colleges or universities, and digital programmes are allowing students to lower their own costs and shorten time to degree. ■



Introduction

Pensacola, Florida has earned a reputation for training US Navy pilots to fly state-of-the-art jets—not so much for launching state-of-the-art academic programmes with a global reach. But as home to the University of West Florida (UWF), Pensacola is right in the thick of global trends sweeping 21st-century higher education.

Traditional admission formulae have filled classrooms ever since West Florida began enrolling students in 1963—historically, nine students in ten come from Florida or neighbouring Alabama and Georgia. But today, even a 12,000-student school nestled in the Florida Panhandle must respond to market forces that are reshaping the academic

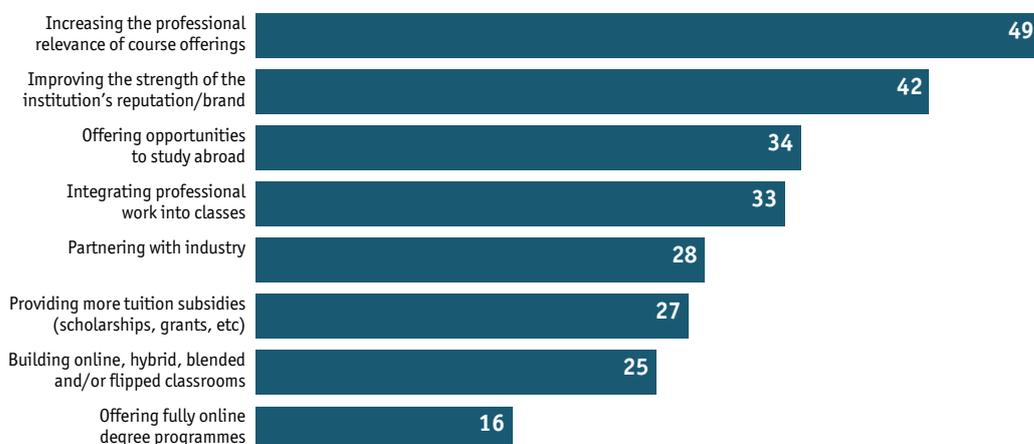
realm. Moreover, its reputation is now compared with those of colleges and universities in the US, Europe and even the developing world. To expand its reach and stay abreast of new trends, the university has launched an “online campus” that offers 30 fully online degree and certificate programmes accessible from anywhere in the world.

So it goes in higher education today. Sustainability depends on tailoring business models to the shifting needs of students. To survive, institutions must tap new revenue streams, ease budget pressures and shift reliance away from public or private subsidies, harness



How does your higher-education institution attract students today?

(% respondents)



Source: Economist Intelligence Unit survey, September 2013

interactive technologies that all students and faculty expect schools to offer, and promote their brands outside the usual markets.

The stakes are vital. Economic realities will soon force or have already pushed schools to trim resources even as students expect an upgraded learning experience—these often mutually exclusive objectives are becoming critical. Innovation and upheaval in job markets will continue to influence students' thinking about careers and thus their decisions about which institution might offer the most career-relevant courses. Rising costs will continue to push tuition rates beyond the reach of many even before an expected uptick in interest rates makes significant college loans a more onerous burden. Shrinking state budgets have already curtailed support for public universities while private universities and colleges are finding that they must scramble harder for every donated dollar.

To fulfil their academic missions in challenging conditions, schools will either adapt or perish. New business models go beyond the subjects and practices usually found in brick-and-mortar classrooms. Solutions combine trimming costs, raising schools' public profiles and deploying new technology. "By making degree programmes in the high-demand fields of nursing and education available online, we are doing just that," says UWF

provost Martha Saunders.

Such upheaval prompted The Economist Intelligence Unit to take the pulse of academia in August 2013. Responses to a global survey represent faculty (51%), researchers (28%), administrators (27%) and managers (26%) located in North America (36%), Asia-Pacific (33%) and Western Europe (32%).

Results of this survey highlight strategies aimed at keeping colleges and universities viable. The top trend today: increasing the professional relevance of course offerings (49%). Students invest in college to advance careers, and tailoring curriculum boosts their return on investment (ROI)—and incentive to enrol. Some schools (33%) have elected to integrate professional work into classes. Asked whether their schools are strongly, moderately or marginally considering expansion through technical training courses, a clear majority say "yes".

Learning technology has graduated from experimental to fully operational. One in four respondents intends to promote online, hybrid or blended programmes or to offer "flipped classrooms" where students secure remote instruction by watching videos, then attend class to do exercises formerly called "homework". Meanwhile, 16% of the schools represented now offer degree programmes that are completely online. ■

“
To fulfil their
academic missions
in challenging
conditions,
schools will either
adapt or perish.”

”

1

Crossing geographic boundaries

Global visibility has become a top priority for many colleges and universities, with expansion abroad a key goal for many. Thirty-three percent of higher-education institutions polled in the EIU survey say they are increasing their recruiting of international students. These institutions are targeting a rapidly growing demographic that is hungry for higher education: a global middle class (those earning from US\$10 to US\$100 per day) predicted by the Brookings Institute to grow from 1.8bn in 2009 to 4.9bn by 2030, with the bulk of that growth happening in Asia.

But many foreign students already study in the US. *The 2013 Open Doors Report on International Education Exchange*, issued by the Institute of International Education, reports that the number of international students attending colleges and universities in the US increased by 7% in the 2012–13 academic year—to a record 820,000 students.¹ Over the past three years, 49% of survey respondents report that the proportion of international students has increased. That figure swells to 57% when looking ahead three years to the change in the proportion of international students. Although more would like to come to the US, capacity is limited and costs are prohibitive.

Competition to recruit and retain top students is heating up worldwide, not just at home. Even US institutions with lofty cachet face significant global rivals, warns Andrew J Policano, the Dean's

Leadership Circle Endowed Professor of Economics/Public Policy at UC Irvine's The Paul Merage School of Business. "This new global dynamic will be a major influence," he says.

Internships and study abroad programmes, now common, could become even more so. Students may start college at their home university and then embark on a series of specialised learning programmes elsewhere. To keep educationally exploratory students connected to the institutions where they began their studies, some universities are forging alliances with schools in other locations. For instance, in 2012 the Wharton School of the University of Pennsylvania created an alliance with INSEAD in France that allows MBA and doctoral students to study at either school for periods of time.

Convinced that a physical presence would capture tuition dollars overseas, some well-heeled institutions have embarked on aggressive expansion programmes over the past decade; today prominent US universities have outposts from Shanghai to Dubai. Fifty-one percent of surveyed institutions say that they are "moderately considering" establishing an overseas physical site to bolster their international presence.

However, newer trends cast doubt on the merits of filling actual classrooms abroad. Rents and salaries, to say nothing of construction costs, make for costly ventures with myriad hurdles and uncertain rewards. For schools with limited resources, low visibility or state funding subject to

¹ <http://www.iie.org/Who-We-Are/News-and-Events/Press-Center/Press-Releases/2013-11-11-Open-Doors-Data#.Uuu0rXnl1Fx>

Springtime for Asia

For many higher-education institutions, Asia looks like the Promised Land. Three-quarters of surveyed higher-education stakeholders say Asia holds the greatest interest for them as they consider expansion beyond their own geographic borders; 56% of respondents say that the key attraction is the potential for increased revenue.

Looking to Asia makes sense. According to the OECD, 66% of the 3.2bn people expected to make up the middle class in 2030 will reside in Asia. Western universities that establish themselves in the region will be able to build their reputations and reap the financial benefits.

Asian nations appear to understand this well. Many governments are giving their own universities generous new subsidies—a far cry from the cuts institutions are experiencing in the US and the UK. Arnoud De Meyer, president of Singapore Management University, notes that institutions in Singapore and the rest of the Pacific Rim have benefitted from the region's economic growth. "In China, governments are heavily investing in

new buildings and faculty, improving services for students," he explains.

But Mr De Meyer adds that the generosity will not last forever. In the coming decades, he predicts that many institutions will experience a major funding shift as a large proportion of their population begins to age out of school-going range. By 2050, approximately one out of every four people in China is expected to be older than 65. "We have a relatively young population, but the ageing of the Asian population is happening fast," says Mr De Meyer. "And I am sure there will be a reduction of resources in education that will go into infrastructure to support the ageing and health costs." Governments are likely to spend more supporting the post-employed, rather than subsidising training for the new wave.

As for now, however, Asia remains a region to contend with. As Mr De Meyer notes, "The commitment in Asia from government is still very strong." ■

“
[The] new global
dynamic will be a
major influence
”

Andrew J Policano
Professor of Economics/
Public Policy
The Paul Merage School of
Business, UC Irvine

local taxpayer scrutiny, sending assets overseas is not an attractive or viable option.

And in the rush to enrol foreign students, developing nations have entered the fray. Their higher-education institutions combine improving

reputations with lower costs because of lower faculty salaries, less expensive real estate and—in contrast with the more-developed world—generous subsidies from regional and national governments eager to hold on to their student populations. ■

2

Creative financing



Colleges and universities in developed countries are under pressure to find new sources of income in the wake of financial crises. In the US, state governments short of cash have tightened the reins on grants that furnished most academic funding to public institutions. Fifty-one percent of survey respondents say that reduced government subsidies have negatively or somewhat negatively affected their institutions' financial standing; 40% cite the shrinking availability of research grants.

Basic arithmetic underscores the magnitude of financial challenges that arise when governments slash funding. To replace a collective US\$100m in operating income lost to budget cuts, universities must secure a US\$2bn endowment, says Mr Policano. Such windfalls are unlikely at best.

In the private sector, meanwhile, financial gifts from alumni, foundations, corporations and other groups rose less than 1% in the US during 2012 (after inflation), according to data collected by the National Association of College and University Business Officers (NACUBO). In years marked by financial turmoil, financial gifts from private donors slipped. Even if the run-up in stock prices during 2013 fuels generosity, donations may not reach pre-recession levels and will only rise for select academic institutions.

With reduced incomes and absent full access to former funding sources, leaner university treasuries cannot afford the same levels of services and staffing—even where endowments provide a cushion. Increased financial constraints have resulted in bigger class sizes (31%), difficulty in

attracting top faculty (22%), the loss of academic programmes (22%) and even the elimination of faculty positions (18%). In a bid to support their bottom lines, some universities located near each other have explored sharing resources and facilities.

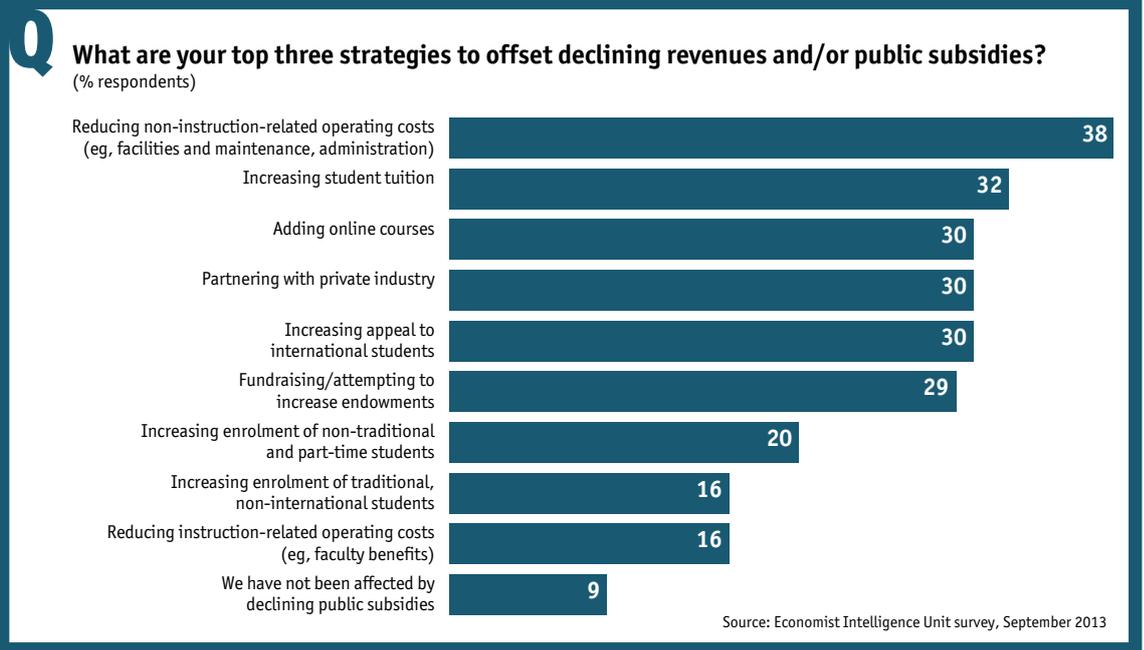
Sustainability will depend on rigorous cost-cutting in tandem with finding new sources of revenue. Toward these ends, nearly two-thirds of the academic institutions polled in our survey indicate that they plan to streamline budgets and look for new revenue streams.

Cuts in basic spending remain the first choice for higher-education institutions looking to balance their books, notes Thomas Estermann, director of governance, funding and public policy development for the European University Association (EUA). He has seen institutions cap the number of paid holidays and increase the amount of time faculty and administration must work. Difficult decisions on where to spend or save money will mean tighter scrutiny than before.

"Institutions are looking much more closely at their activity portfolios," says Mr Estermann.

Automating roles through technology (37%) leads as a strategy aimed at reducing operational costs. Limited options will compel schools to eliminate courses and programmes (31%) and cut faculty positions (22%). While academic institutions can eliminate programmes deemed ancillary to their primary educational missions, they can trim budgets only so far before they start to imperil their missions.

Thirty-two percent of survey respondents are



attempting to increase revenue even as they cut costs by raising student tuition. However, doing so tends to invite adverse consequences at all but a handful of colleges and universities with stellar reputations and many more applicants than places—education in developed nations is approaching the limits of what students will pay, says Mr De Meyer.

Hardest hit are schools like Sewanee, the University of the South, whose alumni include the Pulitzer Prize-winning biographer and former *Newsweek* editor Jon Meacham. In 2011 Sewanee cut its tuition by 10% after students Sewanee had hoped to enrol chose to attend less-expensive schools.

Tuition deflation is possible, even probable—many schools' discount strategies have used grants intended for academic initiatives to subsidise tuitions. Unbeknownst to parents footing the full bill for their children attending college, the average tuition discount has climbed six years in a row to 45% of cost.¹

¹ http://www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/June_2013/Demand_Drives_Discount_Rates.html

Universities are reaching out to the private sector as well. Sponsored research agreements (SRA), where private sources underwrite research at universities, boost revenue at Stanford University, the Massachusetts Institute of Technology and other pre-eminent US research institutions. Universities in Europe and Asia are also eyeing private sources, as well as competitive grants and contracts from businesses and industry. Trinity University in Dublin has aligned itself with developers and England's University of Loughborough now rents out its world-class sports facilities to private organisations.

With or without strings attached, forming partnerships with special interests can impinge on cherished academic freedoms. In the eyes of some observers, the Florida State University tarnished the integrity of its economics department when, in exchange for a US\$6.5m cash contribution, it surrendered veto power over two tenured posts and the right to shut down unacceptable programmes to a politically motivated foundation. ■

“Institutions are looking much more closely at their activity portfolios.”

Thomas Estermann
Director of governance,
funding and public policy
development
European University
Association

3

The digital domain

The popularity of massive open online courses, or MOOCs, looks to many universities like a mixed blessing. They are free and available to anyone with no need for lecture halls, textbooks or teaching assistants. Fans applaud MOOCs for those reasons, while critics fear a weakening or watering down of education after centuries of progress and question the long-term economic sustainability of the new model.

Nevertheless, today's institutions of higher learning have high hopes for technology-based delivery of instruction. While administrators and board members at some schools debate whether to test the waters with one or two courses, the roster of schools offering broad portfolios of online degree or certificate programmes is growing.

One in four administrators surveyed by the EIU expects online and hybrid courses to attract more students and bring more revenue to their colleges or universities. More than six in ten say that online learning tools will help them broaden their mission in education, reach more students and expand globally. And, because virtual courses may also reduce the costs associated with offering on-site classes, they may become another means of balancing budgets.

An online subsidiary of Cornell University, eCornell exemplifies this expansion into the digital domain. It lists more than 30 professional online certificate programmes in disciplines ranging from management and supervisory skills to project leadership and systems design. Similarly, Georgia

Q What are your higher-education institution's three main areas of focus over the next five years? (% respondents)



Source: Economist Intelligence Unit survey, September 2013

Tech Professional Education Online targets working professionals. Online courses lower or eliminate travel costs, fit learning to individual schedules, budgets and pace of knowledge acquisition, and advance careers without interrupting them.

Students can also earn full undergraduate and graduate degrees online. The University of Texas at Arlington offers a Bachelor of Science degree in nursing as part of the offerings of the largest college of nursing among public universities in the US driven primarily by online programmes. The university also offers online bachelors' and masters' degree programmes in other areas, including education and public policy.

A singular benefit of online learning is the time required to earn degrees. Full-time students or busy working adults eager to finish online academic programmes do not have to wait for requisite courses to come around again in autumn or spring semesters. Frequent cycles permit students to take the courses necessary to earn all

the credits they need when they need them.

Shorter roads to diplomas and certificates allow students to begin or advance their careers sooner, a substantial economic benefit that pays off over the course of a career. "Technology will allow more students to get an education, but now they may be able to do so in three years instead of four," says UC Irvine's Mr Policano. "This could ease the cost for some students."

Students born into the digital era, aka "digital natives", unlike baby boomers, will streamline and individualise online college instruction, says Arthur Levine, head of the Woodrow Wilson National Fellowship Foundation. "Digital media is personalising," says Mr Levine. "I can give you what you need and tie it to your personal style."

According to this blueprint, online courses would emphasise useful, pertinent information over the focus on abstract knowledge that is a hallmark of traditional education. Says Mr Levine: "A professor can be an avatar in your living room."

Georgia Tech's experiment

The Georgia Institute of Technology is an example of the new frontier for advanced degree programmes that require only virtual attendance. Past experience with individual online courses in computer science convinced Georgia Tech educators and administrators to confer an online master's degree. "It's not an accident that we presented this option," says Dr Rafael Bras, Georgia Tech's provost. "I want to make sure this is done right, and frankly make sure the clientele is there."

Online students can earn Georgia Tech credentials at a significant discount. At US\$6,600, the online programme is one-sixth as expensive as the current on-campus degree. Students will take all 12 required courses through MOOCs, but will not need to visit the Atlanta campus during the two to three years typically required to complete a degree. Today, the school is able to accept fewer than 200 of the approximately 1,400 who apply each year for the residential degree. The school hopes to attract—and enrol—thousands more. In

view of its substantial investment in launching the online degree programme, Georgia Tech is hedging expectations on the outcome. "It's definitely a numbers game for us," Dr Bras says.

Methods and technologies that take root will guide other departments. If successful, added revenues would offset pressure to raise tuition or build facilities to house more students. No one imagines moving the entire school online or even offering a full roster of undergraduate degrees, but the school plans to add Internet-based master's programmes and prerequisites as time goes on. The tools and technologies that "take" will be seeded throughout an undergraduate's residential tenure.

"If, through blended courses and inverted courses, I manage to eliminate 500-large lecture halls, I'll be a happy man—because I think that will be a better education," says Dr Bras. "We can increase opportunity, open up to new audiences, increase efficiency and get better outcomes. That's certainly why we are [doing] it." ■

“
Education is going
to be more
interactive and
personal than it’s
ever been.”

”

Arthur Levine
President, Woodrow Wilson
Foundation

Mr Levine and some of his peers assign MOOCs a historic place in the progress of online learning. “We know they are the prototype of this development,” Mr Levine says. These observers welcome massive open online courses that—at the very least—stir up interest in technology-based learning at water coolers, cocktail receptions and dinner tables.

Not everyone considers MOOCs to be benign. Critics worry that casual college courses could water down rigorous academic pursuits and divert serious students from pursuing a real education. The University of Pennsylvania Graduate School of Education probed MOOC popularity for signs of its impact. Researchers analysed the study habits of 1m students who signed up for MOOC courses over 12 months through June 2013. Data gave support to the doubters. “Massive open online courses have relatively few active users,” the authors reported. Furthermore, they found that user engagement seldom persists beyond the first two weeks, with “few users” getting all the way to the end.

Transition to online learning in any venue comes naturally to college students today, says Mr Policano. As students enter the workforce in

greater numbers, a growing population of young professionals will appreciate online learning that bestows recognition identical to diplomas or degrees earned on a campus. What is more, they will welcome the chance to forgo impersonal classes taught in packed lecture halls.

“When I was in college I remember sitting in the back of a 500-person room,” says Mr Policano. “The reality is that we have a whole new generation much more in tune with self-directed, digital education. They can find information much more quickly and they are much more accepting of online courses. There will be a very big demand for them.”

The optimism is palpable: 61% of survey respondents say that they believe online and distance courses will have the greatest effect on how higher education is delivered in the next five years. “Does this mean that the physical campuses disappear?” Mr Levine asks. “No. When we moved to public schools, Andover and Exeter didn’t disappear. We’re going to have colleges that are still there. Education is going to be more interactive and personal than it’s ever been.” ■

4

Conclusion: new avenues await

The world of higher education will need to reassess priorities as its “customers”—its students—demand changes in the accessibility of higher learning.

Today, a profound disconnect separates the needs of students and the models of higher education that prevailed in the 20th century. Four years of two semesters divided by summers do not fit the requirements of a growing number of global students eager to gain footholds in the real world and their careers. In addition, a world gone mobile has extended to education. Virtual proximity to far-off places shrinks physical distance; students can take classes wherever they have access to the Internet.

Student preferences are not the only factor challenging conventional models of post-secondary education. A new economic environment has disrupted old practices. Tuition is approaching a ceiling just as government and private funding sources pull back, and, though rising affluence in

developing countries fuels a growing demand for education, the competition for these new students is intensifying.

However, technology is altering the playing field. Deployed properly in the right circumstances, online learning can help colleges and universities stay relevant in an increasingly technology-based world, expand their markets globally and streamline business models without building new classrooms and dormitories.

Moving forward, sustaining a robust higher-education institution will require a new outlook: fresh sources of revenue, improved cost management, innovative means of delivering higher education and an increased understanding of students’ new needs. A changing landscape will require higher-education institutions to adapt to stay competitive and to fulfil the mission for which they were founded. ■



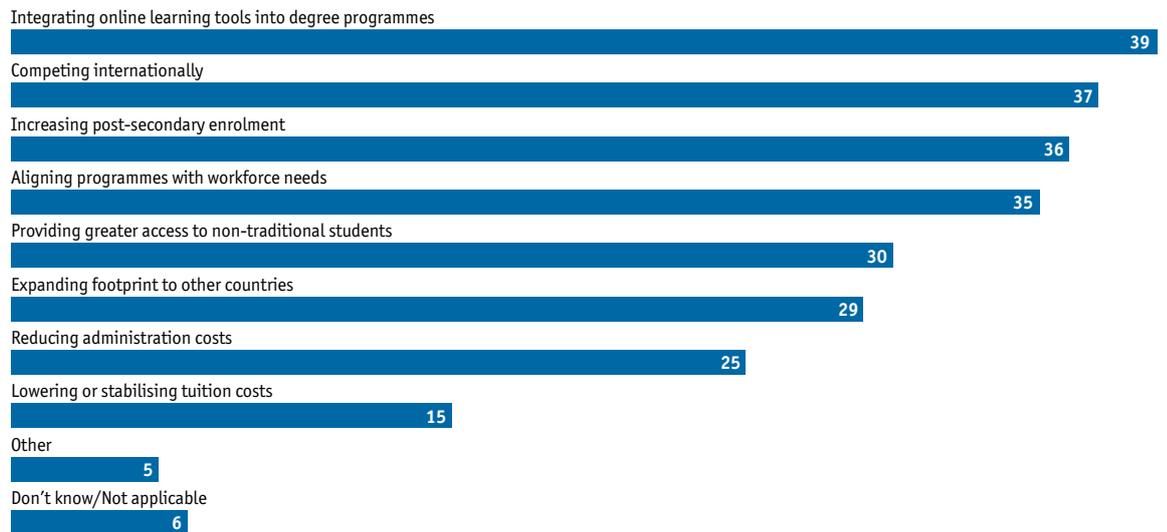


Appendix: survey results

What are your higher-education institution's main areas of focus over the next five years?

Please select up to three.

(% respondents)

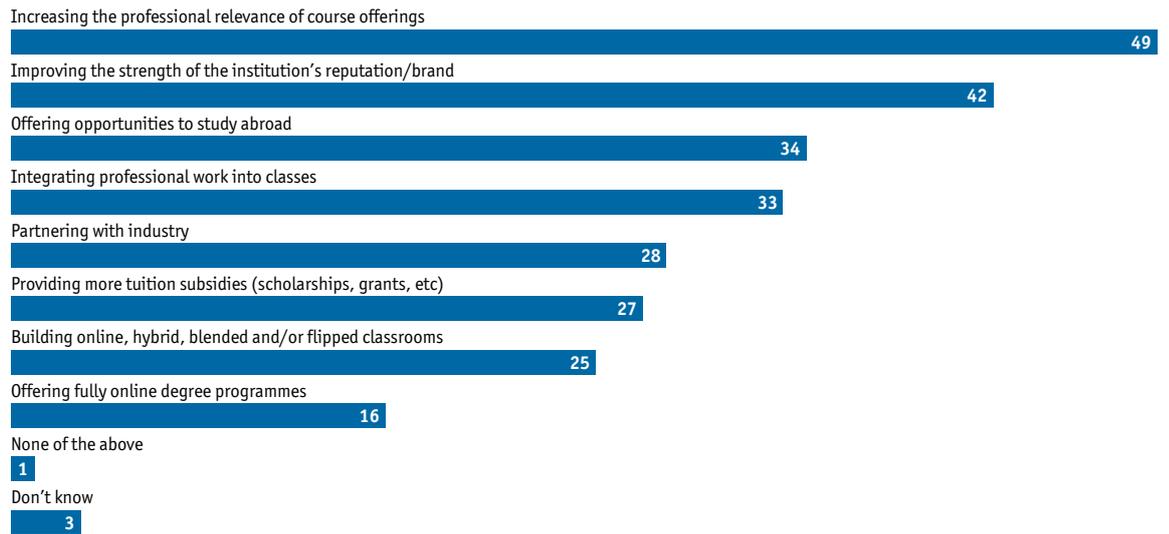


Percentages may not add to 100% owing to rounding or the ability of respondents to choose multiple responses.

How does your higher-education institution attract students today?

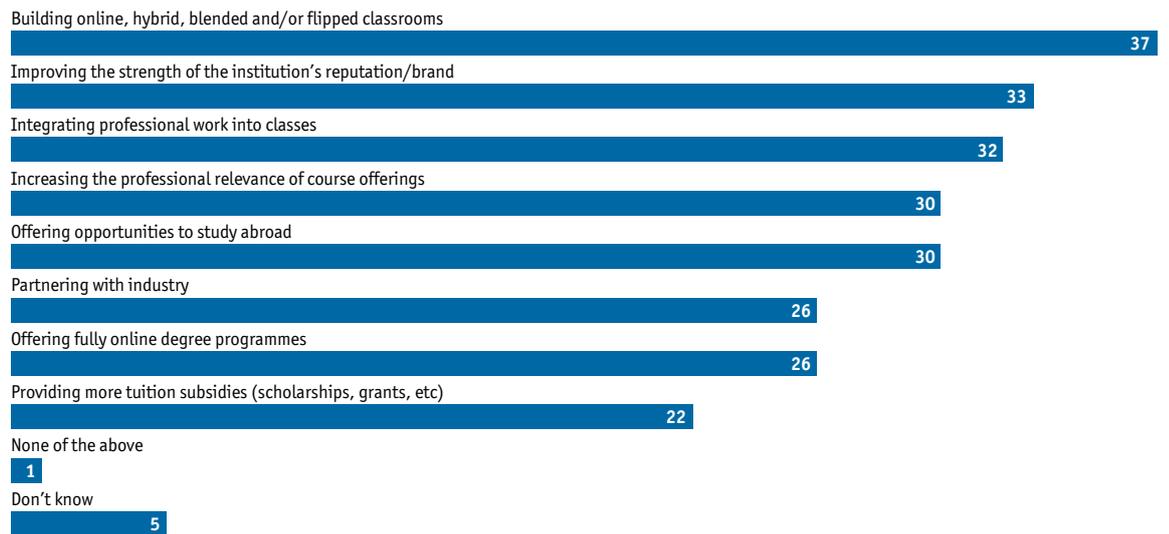
Please select up to three.

(% respondents)

**How does your higher-education institution plan to attract students five years from now?**

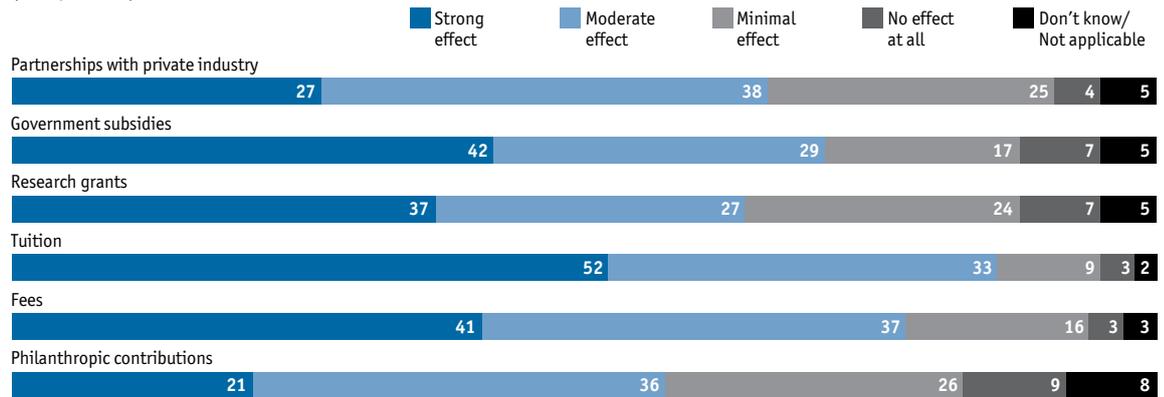
Please select up to three.

(% respondents)



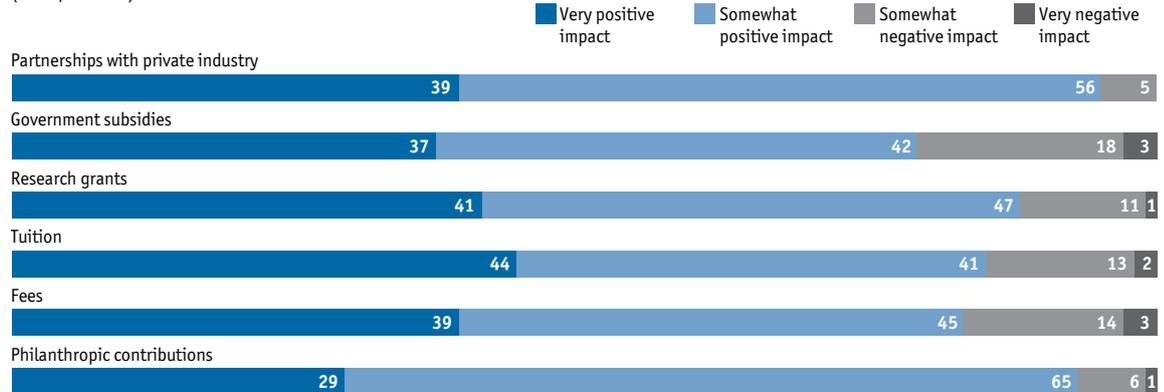
To what extent do you believe that each of the following factors affects your higher-education institution's budgetary strategy?

Please select a response in each row.
(% respondents)



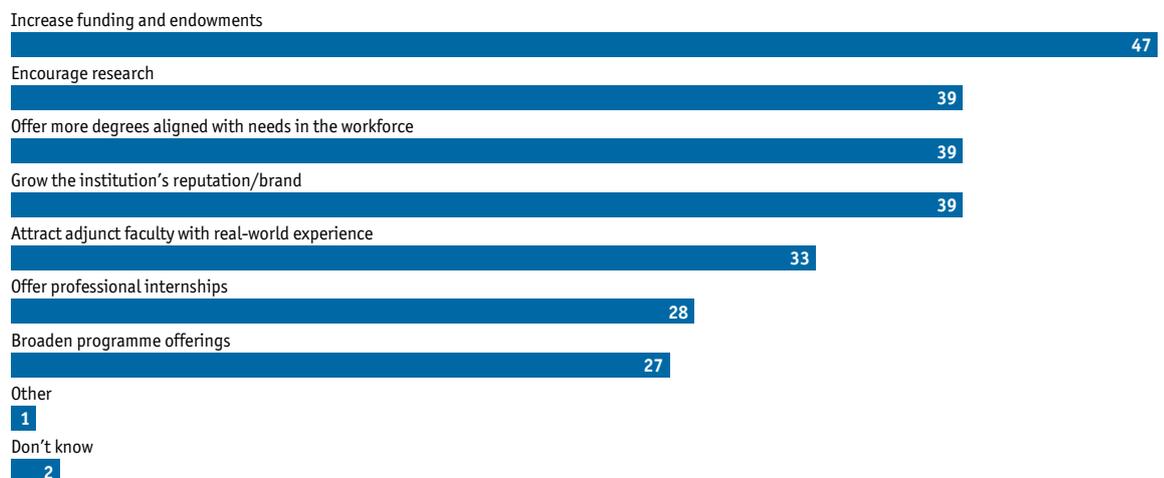
How do you believe these factors will affect your institution's financial well-being overall over the next five years?

Please select a response in each row.
(% respondents)



Why is your higher-education institution partnering, or seeking to partner, with private industry?

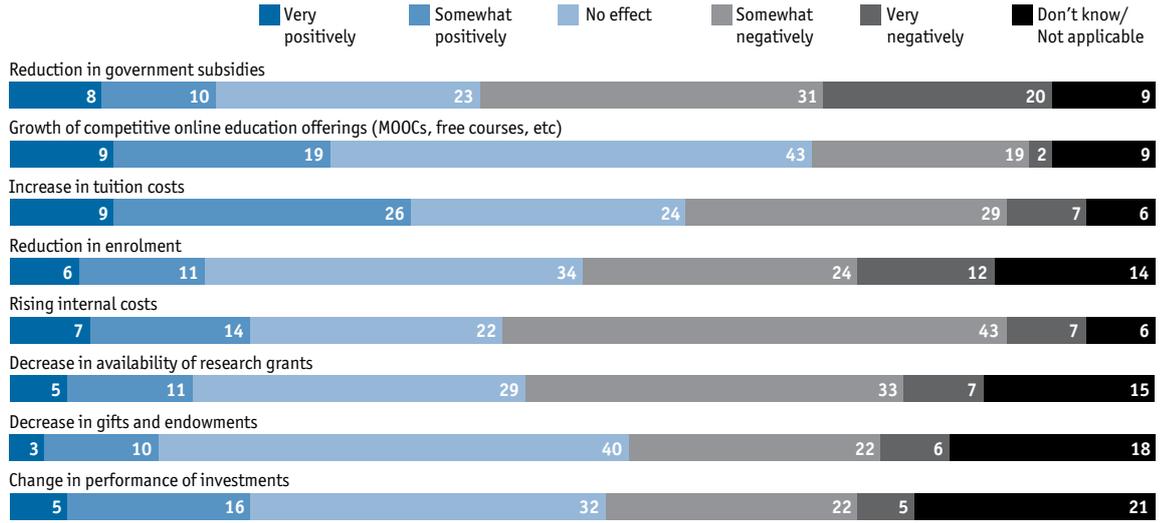
Please select up to three.
(% respondents)



How have the following factors affected your institution’s financial position over the last two years?

Please select a response in each row.

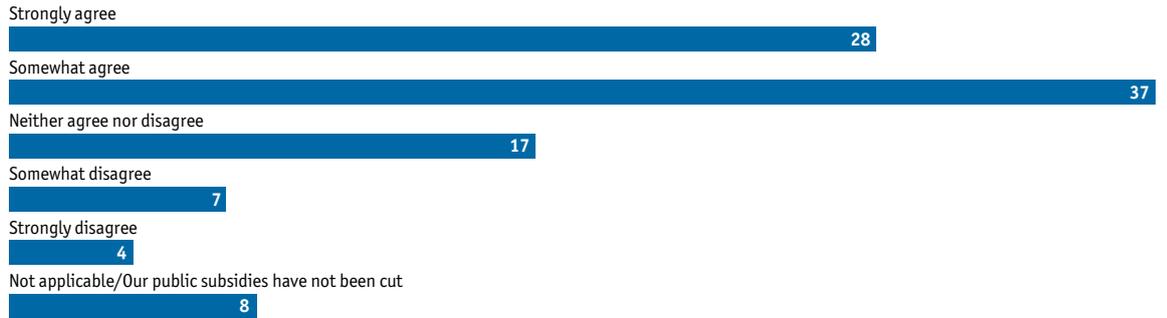
(% respondents)



To what extent do you agree or disagree with the following statement:

‘Cuts in government subsidies have driven my institution to look for additional revenue streams’?

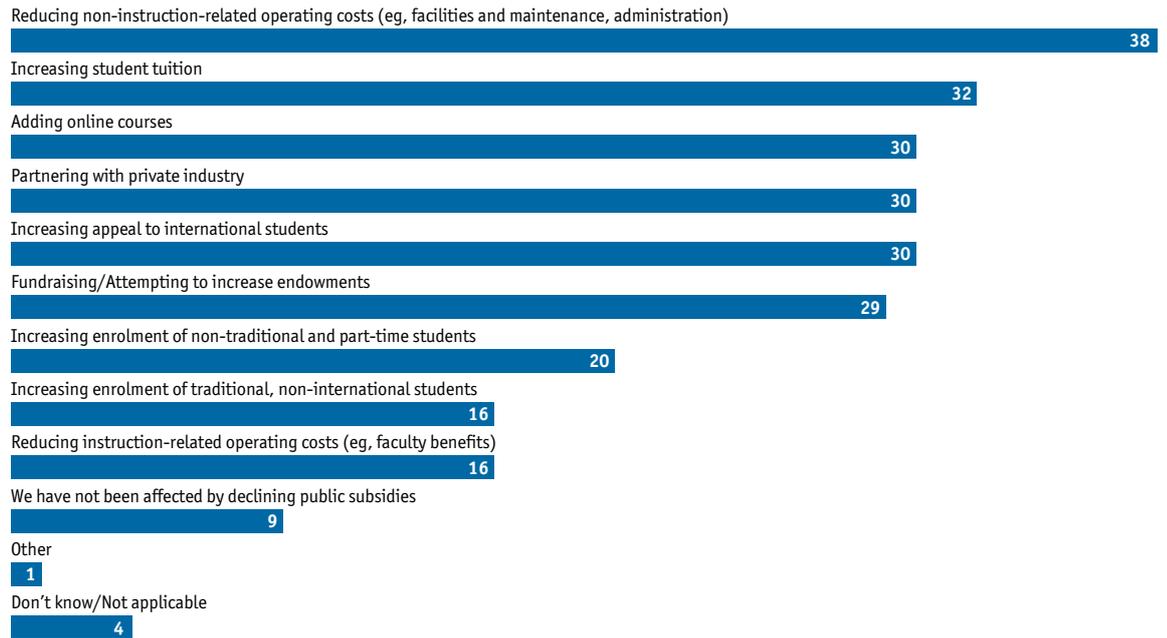
(% respondents)



What are your top strategies to offset declining revenues and/or public subsidies?

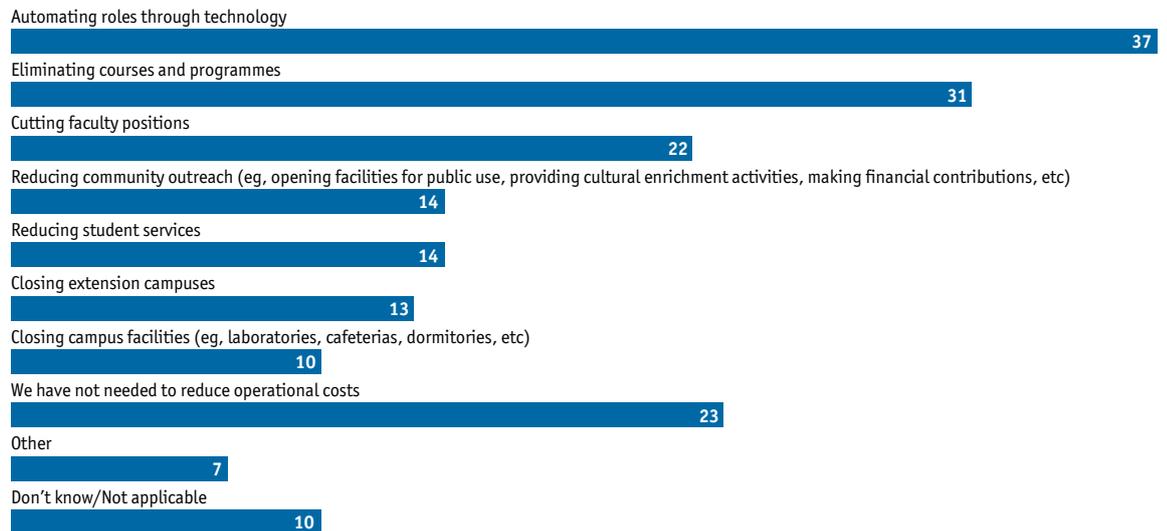
Please select up to three.

(% respondents)

**What are your top strategies to reduce operational costs?**

Please select up to three.

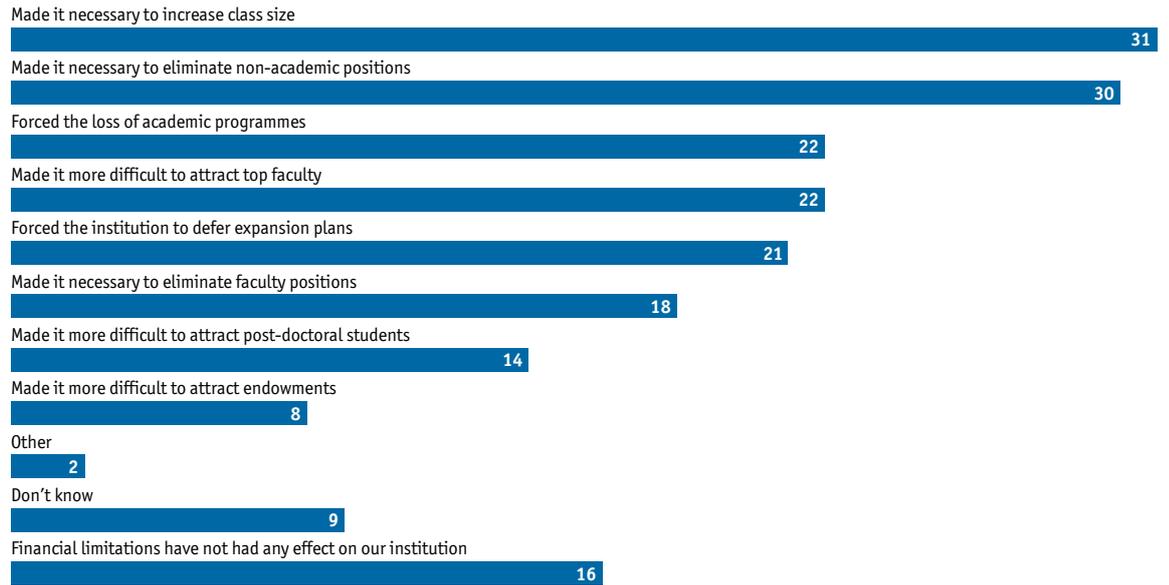
(% respondents)



What main effects have financial constraints had on your institution, if any?

Please select up to three.

(% respondents)

**How has the composition of traditional, non-international students changed over the past three years?**

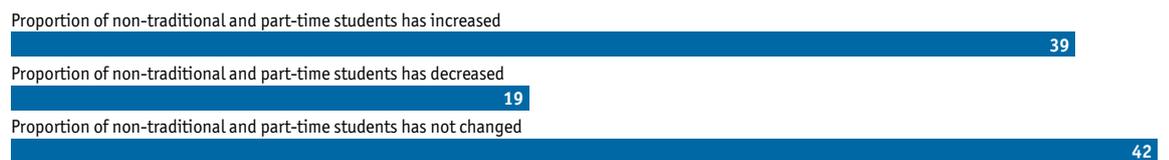
(% respondents)

**How do you expect the composition of traditional, non-international students to change in the next three years?**

(% respondents)

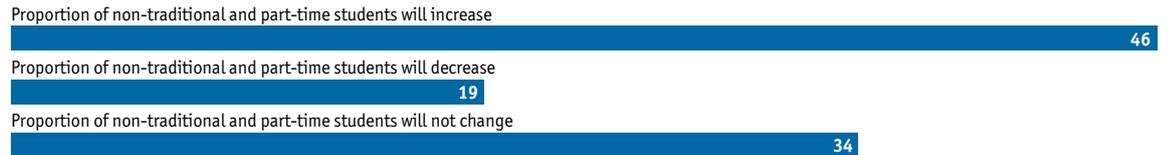
**How has the composition of non-traditional and part-time students changed over the past three years?**

(% respondents)



How do you expect the composition of non-traditional and part-time students to change in the next three years?

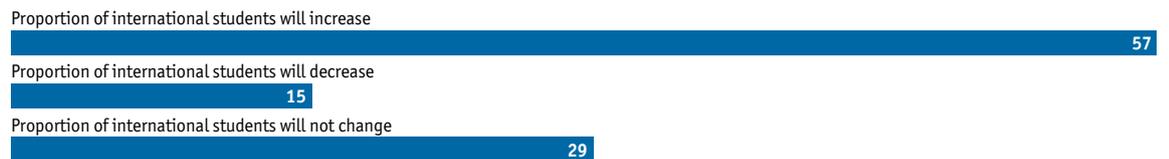
(% respondents)

**How has the composition of international students changed over the past three years?**

(% respondents)

**How do you expect the composition of international students to change in the next three years?**

(% respondents)

**To what extent have concerns about the employment prospects of graduates from your institution affected your administration's setting of tuition fees?**

(% respondents)

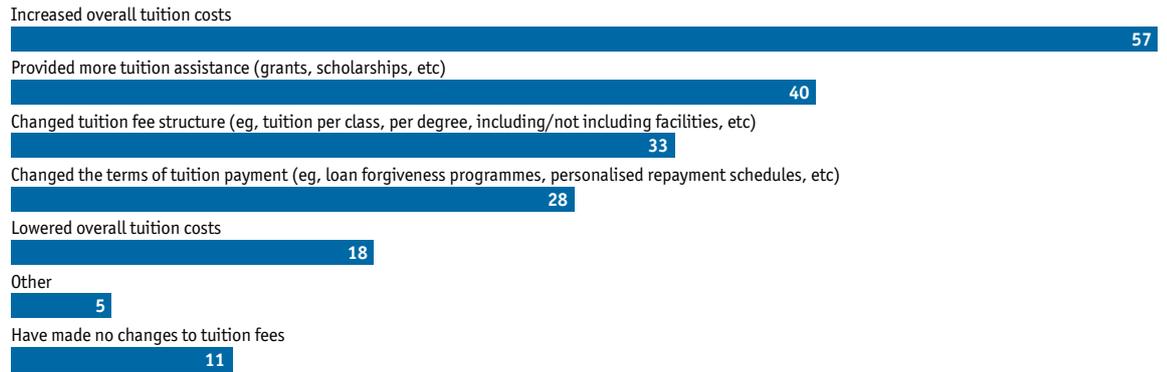


How has your institution modified its setting of tuition fees, if at all?

Of respondents whose institutions have already instituted changes in the setting of fees:

Select all that apply.

(% respondents)

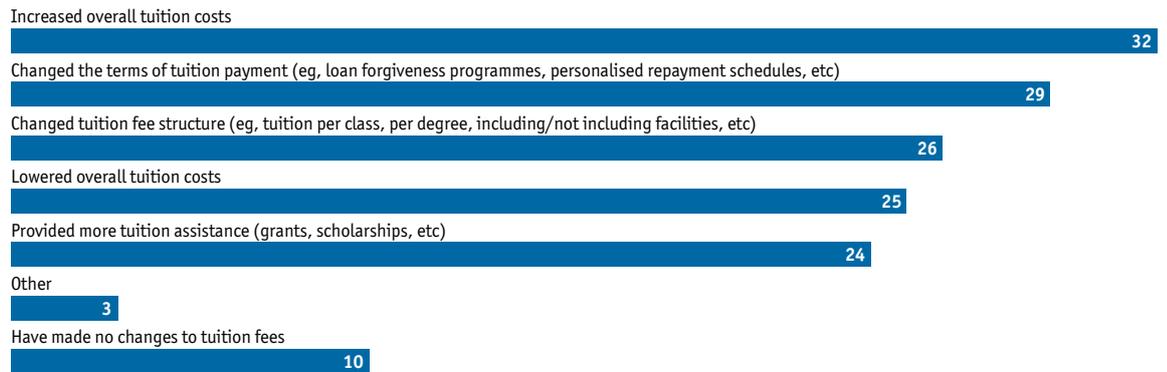


How has your institution modified its setting of tuition fees, if at all?

Of respondents whose institutions plan to institute changes in the setting of fees in the next 1-3 years:

Select all that apply.

(% respondents)



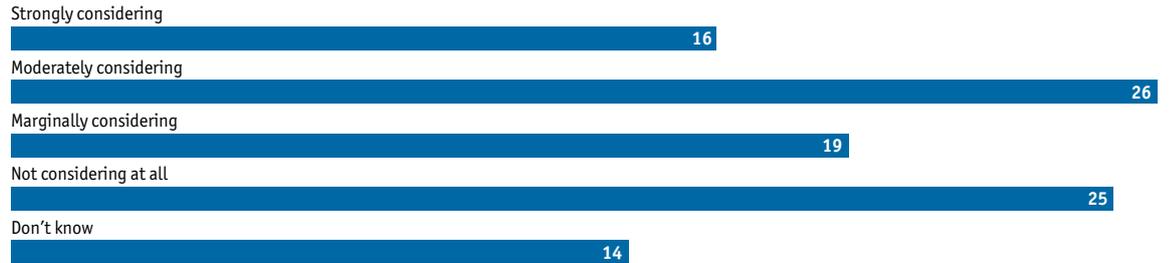
Is your institution offering more personalised degree tracks and coursework than it was three years ago?

(% respondents)



Is your institution considering an expansion through technical training courses?

(% respondents)

**Does your institution offer credit to previous outside experience before college, or from the workplace?**

(% respondents)

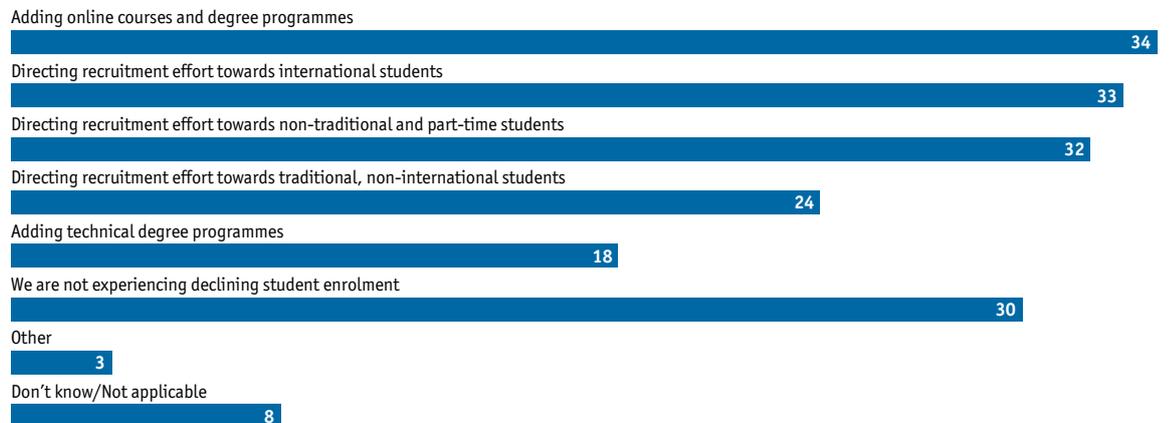
**If not, how much are you considering offering credit to outside experience?**

(% respondents)

**What are your top strategies to offset declining student enrolment?**

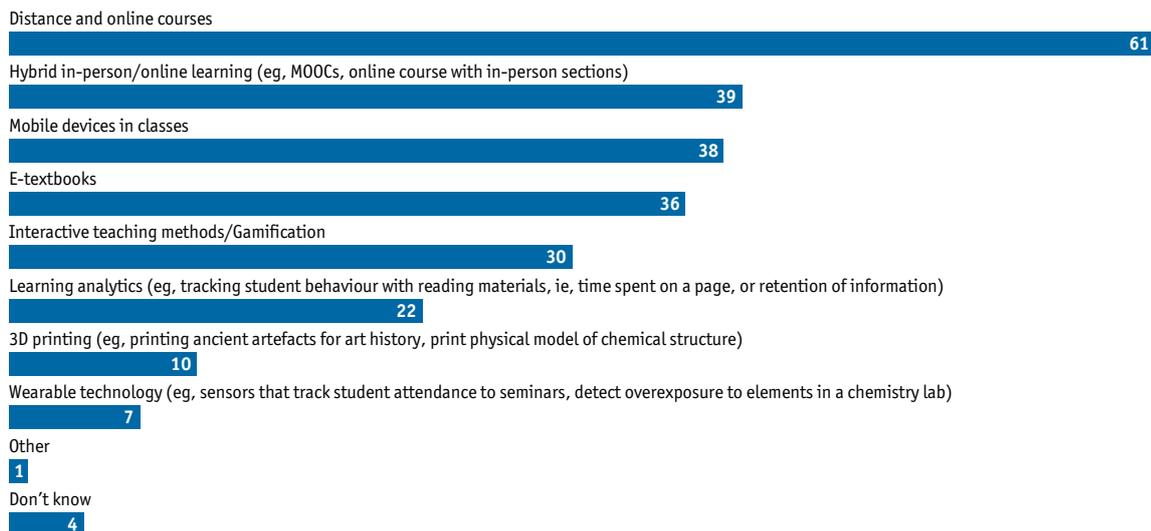
Please select top three.

(% respondents)



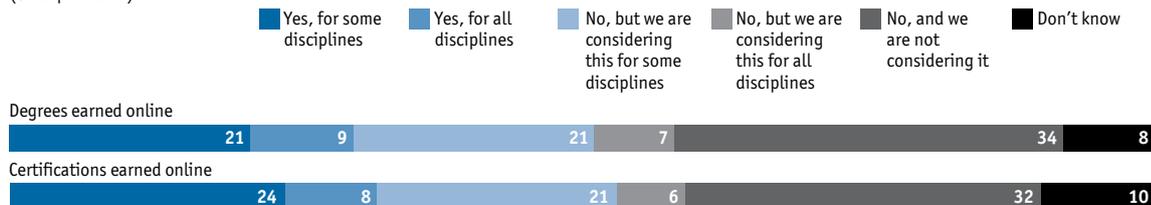
Which technologies do you believe will have the greatest effect on how higher education is delivered in the next five years?

Please select up to three.
(% respondents)



Do you have degrees or certifications available online?

Please select one in each row.
(% respondents)



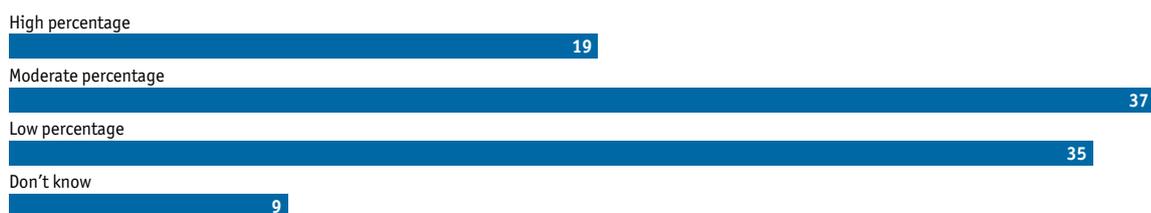
Is your institution adapting any of its current courses or degree programmes to offer them online?

(% respondents)



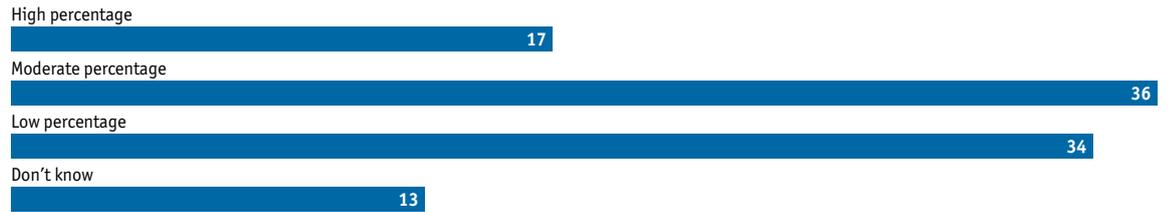
How many courses is your institution adapting to deliver online?

(% respondents)



How many degree programmes is your institution adapting to deliver online?

(% respondents)

**Is your institution increasing its budget for online learning in the next 12 months?**

(% respondents)

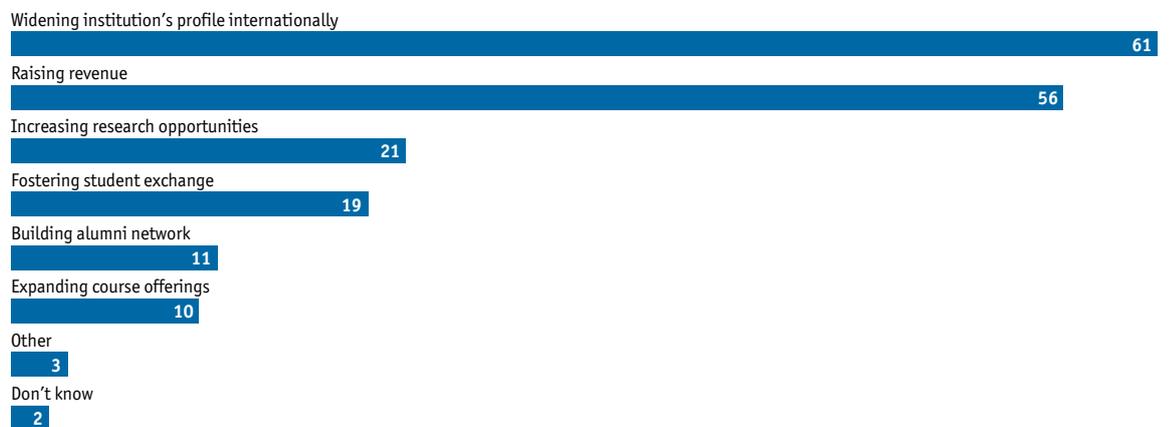
**Is your institution looking to expand its footprint into other countries? (eg, physical campuses, online presence, recruiting internationally)**

(% respondents)

**What are your main motivating factors for expanding into other countries?**

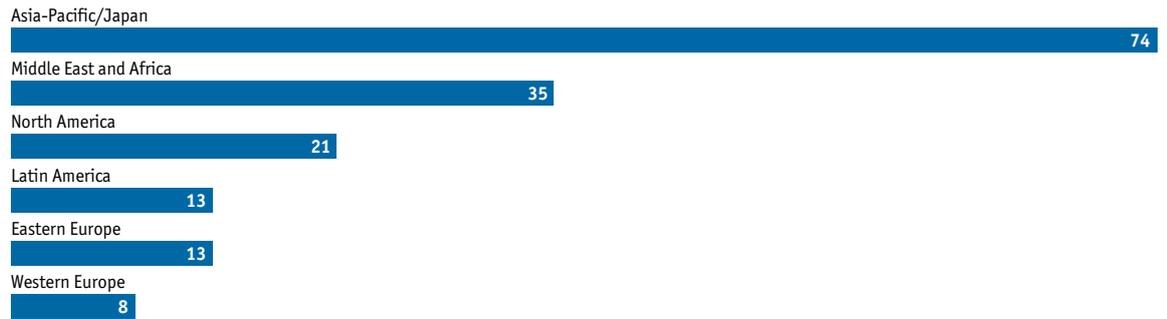
Please select up to two.

(% respondents)



Which regions are of greatest interest when considering international expansion?

Please select up to two.
(% respondents)



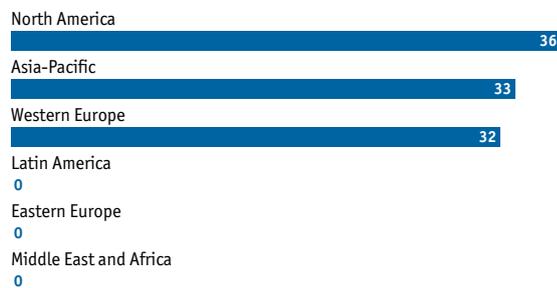
In which country are you personally located?

(% respondents)



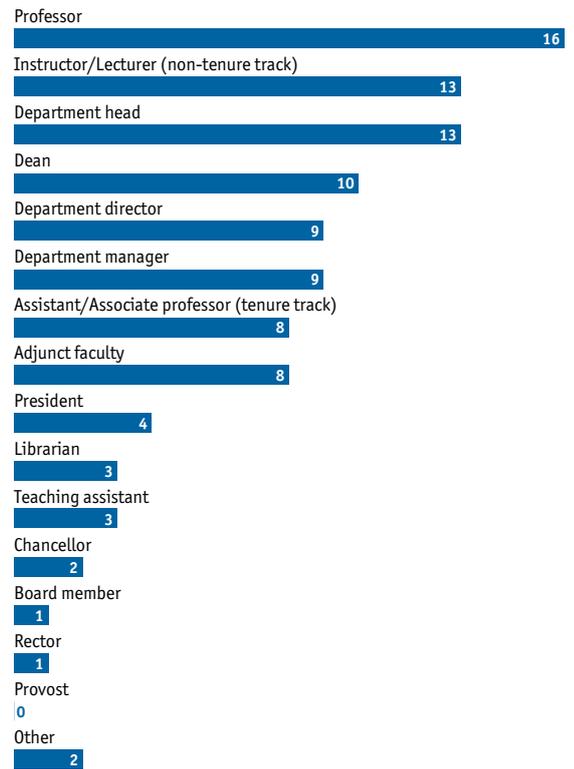
In which region are you personally located?

(% respondents)



Which of the following best describes your job title?

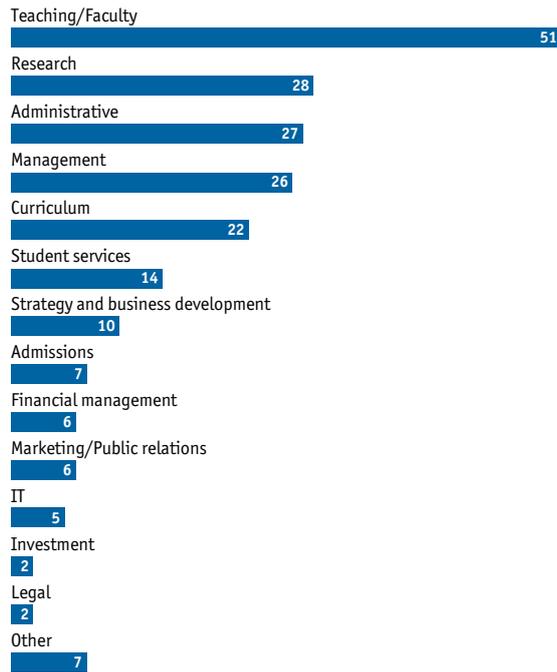
(% respondents)



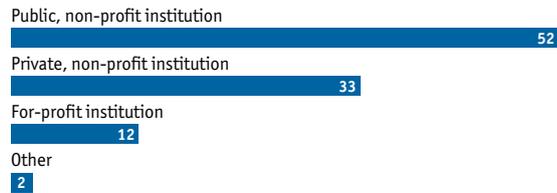
What are your main functional roles?

Select up to three.

(% respondents)

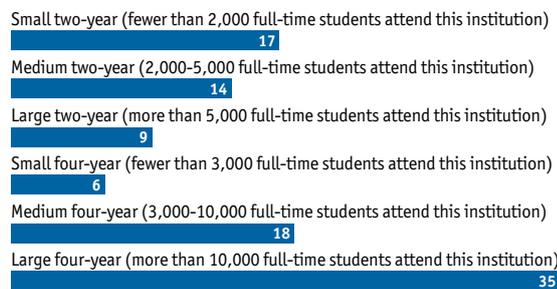
**Which of the following best describes your institution?**

(% respondents)

**Which of the following best describes the size of your higher-education institution?**

Please select one.

(% respondents)



Whilst every effort has been taken to verify the accuracy of this information, neither The Economist Intelligence Unit Ltd. nor the sponsor of this report can accept any responsibility or liability for reliance by any person on this white paper or any of the information, opinions or conclusions set out in the white paper.

London

20 Cabot Square
London
E14 4QW
United Kingdom
Tel: (44.20) 7576 8000
Fax: (44.20) 7576 8476
E-mail: london@eiu.com

New York

750 Third Avenue
5th Floor
New York, NY 10017
United States
Tel: (1.212) 554 0600
Fax: (1.212) 586 0248
E-mail: newyork@eiu.com

Hong Kong

6001, Central Plaza
18 Harbour Road
Wanchai
Hong Kong
Tel: (852) 2585 3888
Fax: (852) 2802 7638
E-mail: hongkong@eiu.com

Geneva

Boulevard des
Tranchées 16
1206 Geneva
Switzerland
Tel: (41) 22 566 2470
Fax: (41) 22 346 93 47
E-mail: geneva@eiu.com