hep | RESEARCH

A FIELD REPORT · 2026

Reaching Higher Education.

The U.S. Higher Education ed-tech market is on a growth tear. The path into it is the slowest, most decentralized, most stakeholder-heavy sales cycle in enterprise software. This field report maps the market, the maze, and the way through.

INSIDE THE HIGHER EDUCATION BUYING LAYER

The institutions, the administrators, the cycles, and the data that turn 4,300+ campuses into a single addressable market.

95K+
Verified administrator contacts across the U.S. Higher Education system

4,300+
Accredited, degree-granting U.S. colleges and universities covered

122
Distinct administrator titles tracked across the academic hierarchy

40+
Years of human-curated, source-verified data, refreshed monthly

> "Higher Education is the only industry we concentrate on. For four decades, that focus has been our customers' competitive advantage, and ours."
>
> **Higher Education Publications, Inc.** · **Established 1982** · **Tracking Who's Who in Higher Education**

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What's inside.

A snapshot of where higher-ed tech budgets are flowing, why those budgets are so hard to capture, and how the data layer underneath any successful higher-ed go-to-market actually works.

01 · THE MARKET

The market is big and getting bigger.

The U.S. ed-tech market, excluding K-12, is the most durable enterprise technology category most B2B vendors still under-prioritize. Higher-ed institutions buy software like governments, replace it like utilities, and expand budgets every cycle the federal cuts allow. The numbers behind the growth are not subtle.

U.S. EDTECH MARKET

$84B

2025 total · 11.7% CAGR

The U.S. ed-tech market reached approximately $84 billion in 2025 and is expanding at a steady 11.7% compound annual rate, reflecting sustained investment in digital education infrastructure across all sectors.

Source: market.us, U.S. EdTech Market Report 2025.

HIGHER-ED SHARE OF SPEND

~28%

Higher ed slice of total ed-tech

Higher education accounts for roughly 28% of all global ed-tech spend, with U.S. universities driving the majority of that share through LMS, SIS, AI, security, and CRM investments.

Source: Fortune Business Insights, EdTech Market Report 2026.

ONLINE PROGRAM EXPANSION

88%

of colleges expanding online

Nearly nine in ten U.S. colleges and universities plan to expand their online offerings in the next three years. Each new program becomes a buying event for content, platform, support, and analytics vendors.

Source: CHLOE 10 Report (Quality Matters, Eduventures, EDUCAUSE), Aug. 2025.

$262B
Global CRM market projected by 2032; universities are major institutional buyers

$8.4B
Enterprise LLM API spend by mid-2025, up 17x in 18 months

57%
U.S. college students using AI weekly in coursework, per the Lumina-Gallup 2026 survey

2/3
Higher-ed institutions globally that already have or are building AI-use guidance

→ **The synthesis.** Higher ed is buying more software, not less, even as headlines fixate on enrollment cliffs and budget cuts. The institutions that survive consolidation buy harder. The ones that don't get acquired or merged, and those mergers are themselves a buying event. Vendors who can reach administrators reliably win disproportionately.

02 · WHERE THE SPENDING IS GOING

Eight categories. One buyer.

Higher-ed tech dollars in 2026 are concentrated in eight categories. Each has its own incumbents, its own RFP shape, and its own internal champion. None of them buy themselves; every one routes through an administrator HEP already knows.

AI & GENERATIVE TOOLS

The new line item

Institutional ChatGPT licenses, writing-detection, tutoring agents, and research copilots. Two-thirds of institutions have or are building formal AI guidance, and a budget line to match.

Anthropic, OpenAI, Microsoft Copilot, Google Gemini, Khanmigo, Packback.

LEARNING MANAGEMENT

The unkillable core

The LMS sits at the center of every academic IT stack. Renewal cycles run 5 to 7 years; the surrounding ecosystem (proctoring, content, integrations) gets rebought every cycle.

Instructure (Canvas), Anthology (Blackboard), D2L, Moodle, Open LMS.

STUDENT INFORMATION & ERP

The system of record

SIS, ERP, and registrar platforms run admissions, registration, financial aid, billing. Modernization projects routinely run 18 to 36 months and span six- and seven-figure deals.

Ellucian, Workday Student, Oracle PeopleSoft, Anthology, Jenzabar.

STUDENT SUCCESS & RETENTION

The retention engine

Predictive analytics, advising platforms, early-alert systems. With every retention point worth millions in tuition, this is the easiest ROI story in higher ed.

EAB Navigate, Civitas, Watermark, Hobsons, Aviso, Element451.

CYBERSECURITY & IAM

The #1 priority

Collaborative cybersecurity is the top item on the EDUCAUSE 2026 priority list. Identity, endpoint, and SIEM spend is up, often funded even when other lines are cut.

CrowdStrike, Okta, Microsoft Defender, Palo Alto, Cisco Duo, SailPoint.

ACCESSIBILITY & COMPLIANCE

The deadline buy

The April 2026 Title II web-accessibility deadline turned a "nice to have" into a procurement sprint. Captioning, document remediation, and audit tooling are absorbing rare un-cut budget.

Siteimprove, Level Access, AudioEye, 3Play Media, Anthology Ally.

CRM & ADVANCEMENT

The revenue stack

Admissions CRM, alumni and donor platforms, fundraising automation. As enrollment competition intensifies, this is one of the few growing line items even at cash-strapped institutions.

Slate, Salesforce Education, Blackbaud, EAB, Anthology Reach.

CONTENT & KNOWLEDGE MGMT

The knowledge layer

AI-powered content management (surfacing institutional knowledge locked in PDFs, emails, archives) became its own category in 2026. Adjacent: research integrity, e-portfolios, credentialing.

Box, Hyland, Microsoft 365 Edu, Notion, Parchment, Credly.

03 · WHY SELLING IN IS HARD

Public-sector sales cycle, with extra steps.

Selling into higher ed is not selling into enterprise. It is closer to selling into state government, with the added complexity that every campus is its own tribe and every dean is their own GM. The structural friction is the reason vendors with the right list outsell vendors with the better product almost every time.

AVERAGE SALES CYCLE

12 to 18mo

First touch to signed contract

For enterprise platform decisions in higher ed, the cycle from initial need to signed contract regularly hits 12 to 18 months. Most institutions follow an academic fiscal year (July to June), and decisions cascade through committees for months.

Source: Salesmotion, How to Sell to Education and L&D Buyers, 2026.

IT BUDGET CUTS

42%

of institutions cutting IT budgets

EDUCAUSE found 42% of higher-ed institutions anticipated IT budget decreases in the 2025-26 academic year, with a median 8% cut expected. Competition for the remaining wallet is intense.

Source: EDUCAUSE QuickPoll, Technology Budgets & Staffing 2025.

TOTAL HE SPEND

$702B

post-secondary annual spend

U.S. post-secondary institutions spend an estimated $702 billion per year across all categories. A meaningful share routes through formal RFP, RFQ, and cooperative-purchasing channels, not Salesforce.

Source: National Center for Education Statistics, 2024.

> “Higher education is decentralized; each department or unit often has its own budget and authority. A university is best understood as a small city, with each school operating almost like its own business.”
>
> LEADGENIUS · SELLING TO HIGHER EDUCATION, 2025

SIX STRUCTURAL FRICTIONS EVERY HIGHER-ED VENDOR WILL HIT

State Procurement — Public universities follow state rules. Multi-year contracts need non-appropriation clauses. RFP pipelines mandatory above thresholds.

Budget Calendars — IT budgets set in fall for the following academic year. Miss the window, wait twelve months. Knowing the fiscal year matters.

Decentralization — Central IT does not control departmental spend. Business school, med school, and central IT can all buy independently.

Compliance Stack — FERPA, HIPAA, accreditation reviews, state privacy regimes, and the 2026 federal accessibility deadline all gate onboarding.

Trust Threshold — Institutions buy from peers. Without case studies from comparable schools, the meeting ends at the first reference check.

Federation Effect — University systems of 8 to 24 campuses centralize some buying and decentralize others. Selling system office and campus is required.

04 · THE STAKEHOLDER CABINET

The single decision-maker is gone.

A decade ago, an enterprise sale into a campus often started and ended with the CIO. That model is dead. Today, a single platform purchase (say, a student-success suite or an AI tutoring tool) touches a cabinet of six to ten distinct administrators, each with veto power and none with sole authority. Multi-threading is no longer a tactic. It is the only way in.

THE ADMINISTRATORS A TYPICAL HIGHER-ED DEAL MUST REACH

President / Chancellor	Budget signal-setter and sponsor for institution-wide initiatives. Rarely the buyer, often the unblocker.	**Provost / Academic VP**	Final say on anything academic-facing: curriculum, LMS, AI policy, faculty-affecting tools.
CIO / CTO	Owns infrastructure, integrations, security review, vendor consolidation. Still essential, no longer sufficient.	**CFO / VP Finance**	Multi-year contracts, total cost of ownership, capital vs. operating funding decisions.
Dean / Dept Chair	School-level budget holders. Business, Engineering, and the Med School each buy independently.	**Director of Admissions**	Owns the enrollment funnel. Primary buyer for CRM, lead-gen, and recruitment tools. High turnover.
VP Student Affairs	Retention, advising, well-being. Increasingly the buyer for AI-driven student-success platforms.	**Registrar**	Owns SIS, transcripts, scheduling, course catalogs. Quiet but absolute authority over data integrity.
Director of Development	Advancement, fundraising, alumni relations. Heavy CRM and giving-platform buyer.	**Procurement Officer**	Runs the RFP process, enforces compliance, controls timing. Adversary or ally, your choice.
Director of IR / Analytics	Institutional research and effectiveness. Validates ROI claims. Increasingly involved in AI evaluation.	**Accessibility Coordinator**	Newly elevated under the 2026 federal accessibility deadline. WCAG compliance is now a vendor onboarding gate.

→ An average mid-size deal touches **six to nine** of these named roles before signature. Knowing each one by name, title, email, and direct line, and knowing when they were appointed, is the difference between a campaign that converts and one that disappears into a generic info@ inbox.

05 · STALE DATA IS A TAX

Higher ed has the highest administrator turnover of any vertical we measure.

The hardest part of higher-ed go-to-market is not finding the names. It is keeping them current. HEP tracks tens of thousands of administrator changes every year. Generic B2B databases scrape once a quarter; by the time a campaign sends, a meaningful share of those records are already wrong.

TOP 10 EXECUTIVE ROLES

21.4%

two-year turnover, 2022-2024

HEP's decade study tracks the ten most senior administrator positions. The most recent two-year window hit 21.4%, the highest rate in the study's history.

PROVOST / ACADEMIC VP

31%

turnover, HEP #1 ranked role

The chief academic officer signs off on LMS, AI, and curriculum. Provosts top HEP's turnover ranking. Catch them in their first 90 days.

PRESIDENT / CHANCELLOR

23.5%

two-year turnover (2020-2022)

HEP's data shows nearly one in four institutions changed its top officer in the last two-year window measured. Outreach to a stale list lands nowhere.

ADMISSIONS / DEVELOPMENT

21.1% / 15.8%

two-year turnover, respectively

The highest-frequency buyers of CRM, recruitment, and fundraising tools also turn over fastest at the operating level.

> “In an era of automated scraping, we deliver the precision that only human-verified data can provide. We don't use bots. Our data is verified by expert editors through direct institutional contact.”
>
> HEP EDITORIAL STANDARDS, IN CONTINUOUS PRACTICE SINCE 1982

WHAT STALE HIGHER-ED DATA ACTUALLY COSTS YOU

DELIVERABILITY

Your sender reputation

Bouncing into edu domains at scale degrades deliverability across your entire outbound program. Inbox providers don't distinguish between "wrong list" and "spammer."

SALES TIME

Sales hours wasted

Half the cold calls on a stale list go to someone who left the role last semester. Wasted dials compound into entire missed pipeline goals.

LOST CYCLES

Missed budget windows

Reach the wrong person in October, miss the August window. A missed higher-ed budget cycle costs twelve months.

BRAND COST

Reputation in a small world

Higher ed is a peer industry. Provosts talk. A clumsy outreach (wrong name, wrong title) gets noticed across the conference circuit.

06 · HOW HEPINC CLOSES THE GAP

One source. Four decades. One industry.

HEPinc has done one thing, well, since 1982: maintain the most accurate contact database for U.S. higher-ed administrators in existence. Not B2B in general. Not government broadly. Higher education, only. The depth that comes from four decades of single-vertical focus is the moat.

THE GENERIC LIST

Scraped, broad, decaying

- Bot-scraped from public sources
- Refreshed every quarter, at best
- Mixes accredited and non-accredited institutions
- Limited title coverage, usually 20 to 30 generic roles
- No editorial QA, no human verification
- Data goes stale faster than your sales cycle

THE HEPINC DATABASE

Sourced, verified, alive

- → Reported directly by institutions themselves
- → Refreshed monthly with editorial verification
- → Restricted to U.S. Dept of Ed-recognized accredited institutions
- → 122 distinct administrator categories across the academic hierarchy
- → 100% human-curated by editors with direct institutional rapport
- → Built on a 40+ year foundation, deepened every cycle

THE PRODUCT LINE

FLAGSHIP

HigherEd Direct

The searchable web app. Browse all 4,300+ institutions. Filter by enrollment, state, public/private, accreditation. Send messages directly. Updated continuously between annual surveys.

For: sales reps, BDRs, marketers, account researchers.

CRM-READY

Licensed Data Extracts

Customized data files designed for direct import into Salesforce, HubSpot, and other CRMs. Segment by region, enrollment size, public/private, Carnegie classification, built around your campaign.

For: marketing ops, demand-gen, RevOps teams.

REFERENCE

Higher Education Directory

The print directory and President's Report. The original reference, still the industry's most-cited source. The book that lives on the desks of every dean of admissions in the country.

For: executives, conference reps, institutional libraries.

→ Plug HEPinc into the stack you already have. **The data is the same data the universities themselves report.** The advantage is yours.

07 · THE WINDOW IS OPEN NOW

The market is bigger. The path is harder. The data should be both.

Higher-ed ed-tech is the rare enterprise category that will outgrow both its budget pressure and its demographic pressure over the next decade. The institutions buying through that pressure will keep buying. The vendors who can find the right administrator on the right day, at the right institution, with the right title, those vendors will compound.

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