

Understanding Higher Education Enrollment Declines

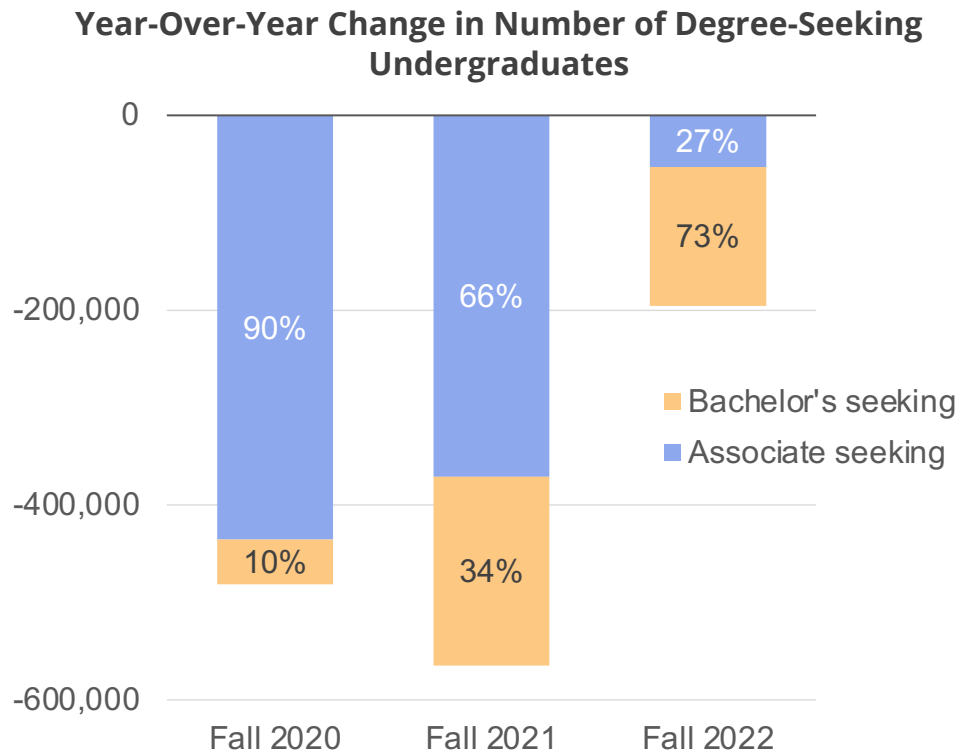
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Doug Shapiro, Ph.D.

Executive Director, National Student Clearinghouse Research Center

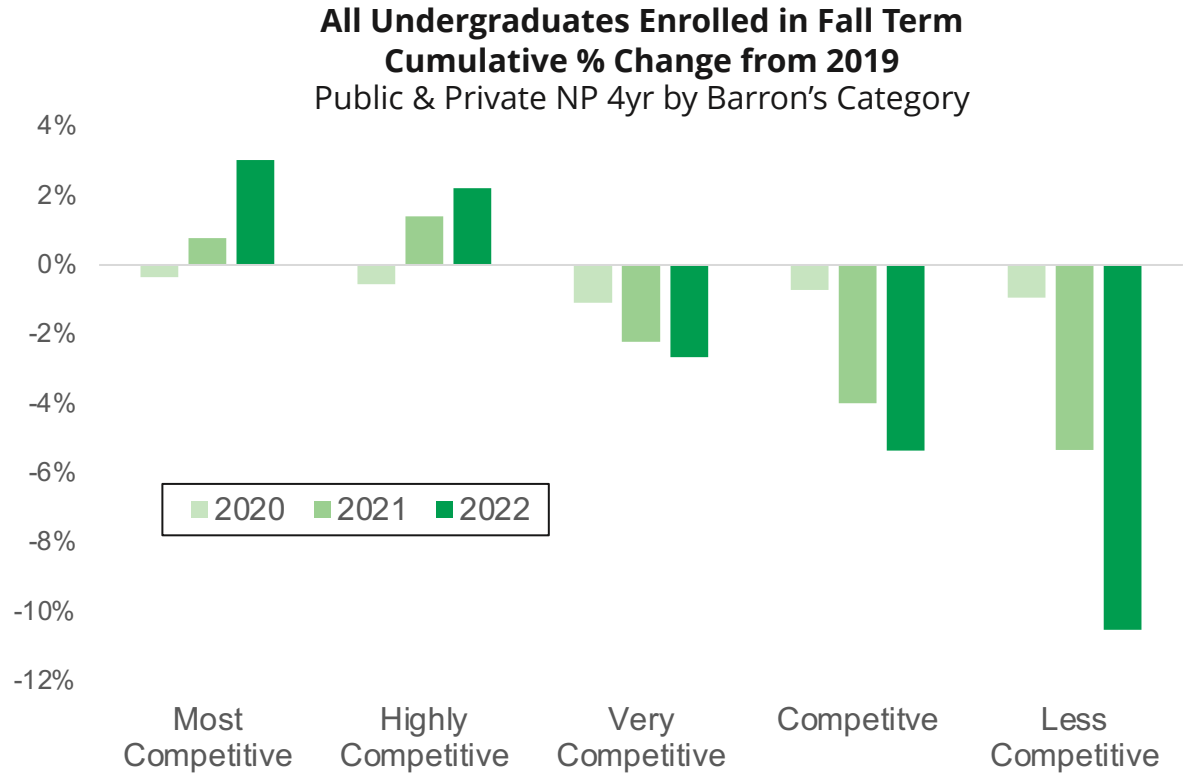
Declines Increasingly Affecting 4-year Students

- In the first year of the pandemic, 90% of the lost degree students were seeking associates.
- Since then, the balance has shifted each year to proportionately more bachelor's-seeking students.
- In 2022, the total losses were smaller but 73% of them were bachelor's-seeking.
- Total decline over three years of about 1.2M students (-7.6%)
 - 859,000 associate seeking (-16.4%)
 - 382,000 bachelor's seeking (-4.3%)



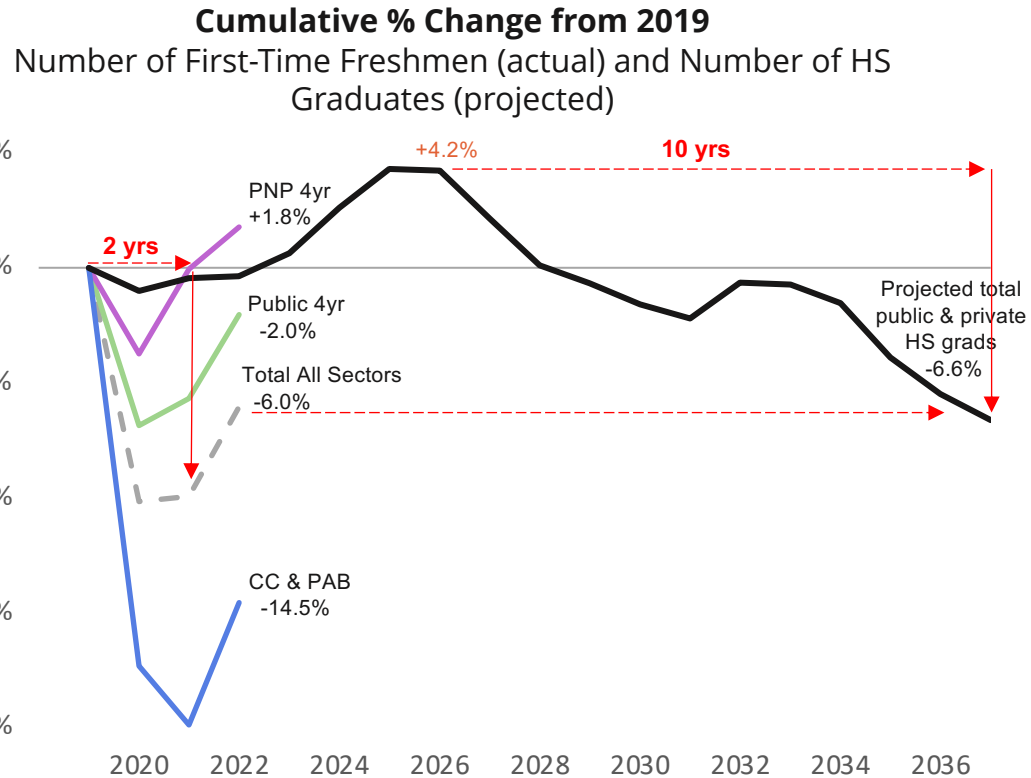
Selectivity succeeds

- In the first pandemic year, all schools declined at about the same rate, regardless of selectivity level.
- The two top categories rebounded in 2021, while all the rest continued to fall.
- The pattern is growing even more divergent in 2022.



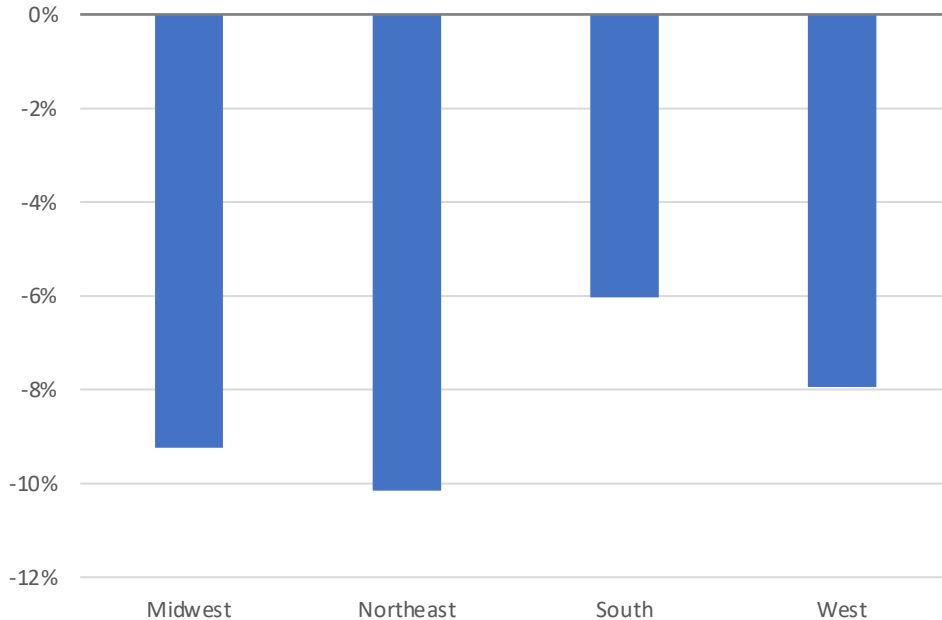
The Demographic Cliff for Traditional-Age Freshmen

- The freshmen declines of 2020 & 2021 were much worse than WICHE’s projected demographic decline in HS graduates for those years
- Even with the “recovery” in 2022, we’re now sitting, after just three years, at the level of the bottom of the “cliff” 15 years away
- We already ran the full cliff (a 10% drop) – *in just two years instead of ten*
- We’ll need more than just the “bump” before the demographic cliff to get back to 2019 levels. It represents only ~600,000 students, just half the size of the current total undergraduate enrollment gap of 1.2M



Wide Range of State Outcomes, but Less Regional Variation

Total % Change from Fall 2019 to 2022
Total Undergraduate Enrollments



Top 10	
Utah	3.6%
Arizona	3.1%
South Carolina	1.1%
D.C.	0.7%
Idaho	-0.2%
Nebraska	-0.8%
Maine	-1.1%
Wyoming	-1.4%
Virginia	-2.0%
Kentucky	-3.0%
Bottom 10	
New York	-11.6%
Michigan	-12.2%
West Virginia	-13.2%
New Hampshire	-13.3%
Missouri	-13.6%
Alaska	-14.0%
New Mexico	-14.1%
Oregon	-14.4%
Washington	-15.4%
Mississippi	-18.6%