Understanding Higher Education Enrollment Declines
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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.

Source: nscresearchcenter.org/current-term-enrollment-estimates Fall 2022
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.

**Source:** nscresearchcenter.org/current-term-enrollment-estimates/ Fall 2022. *WICHE - Knocking at the College Door, 2020*
Wide Range of State Outcomes, but Less Regional Variation

Total % Change from Fall 2019 to 2022
Total Undergraduate Enrollments

Source: nscresearchcenter.org/current-term-enrollment-estimates/ Fall 2022.

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%