

Enrollment Challenges Past and Future

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SHEEO

State Higher Education
Executive Officers Association

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Nathan D. Grawe | *Carleton College*

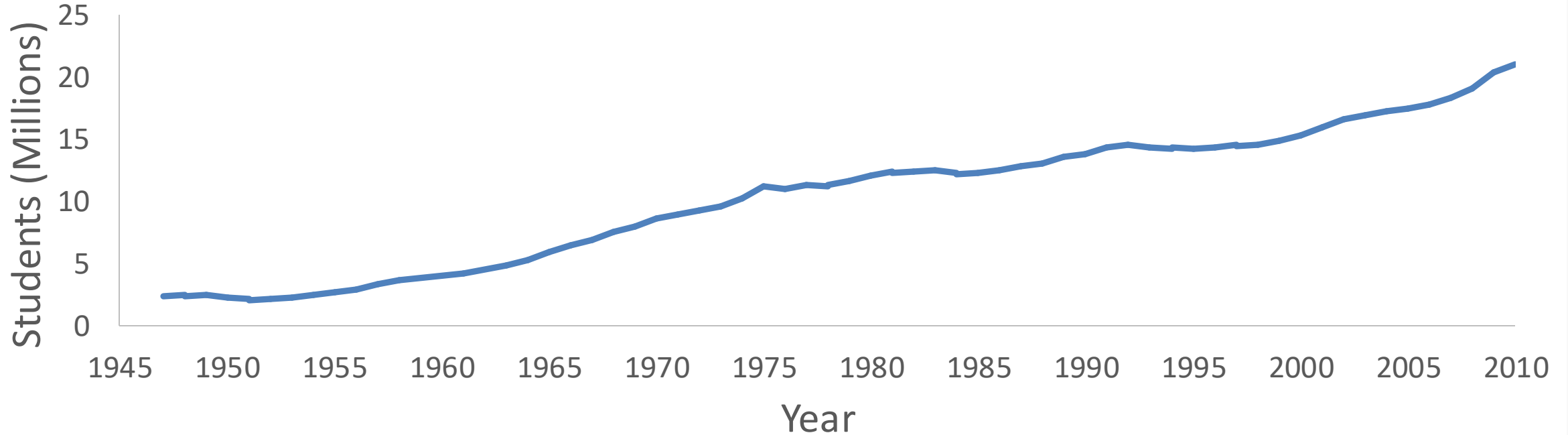
The views presented are solely those of the author and do not represent those of Carleton College.

Golden Age for
Higher Ed:
WWII-2010

The Golden Age of US Higher Education

Consistent, robust enrollment growth

Postsecondary Enrollment, 1947-2010

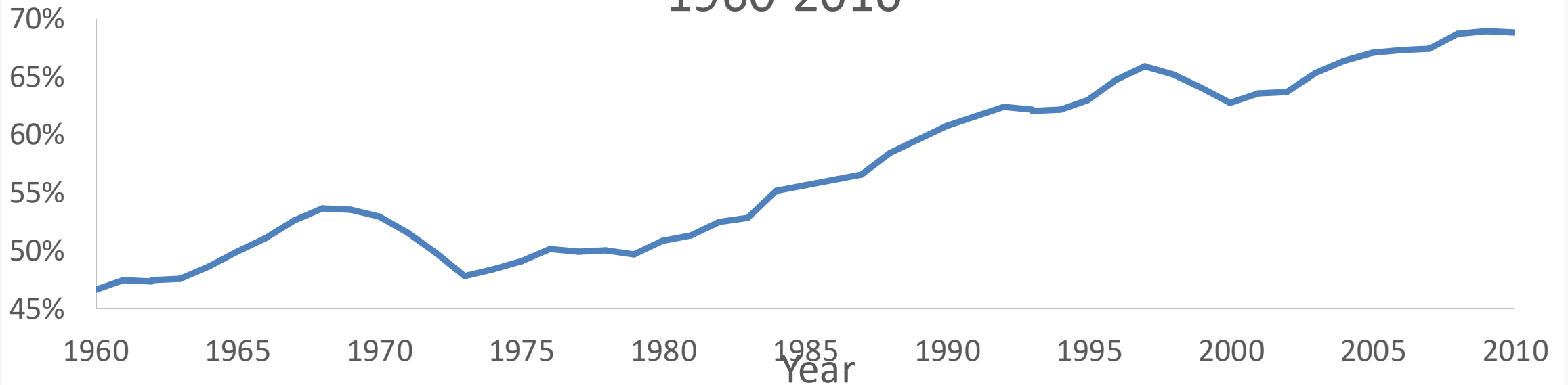


Source: Digest of Education Statistics (2023)

The Golden Age of US Higher Education

Supported by rising matriculation rates

Matriculation Rate among Recent HS Grads (3-Yr MA), 1960-2010



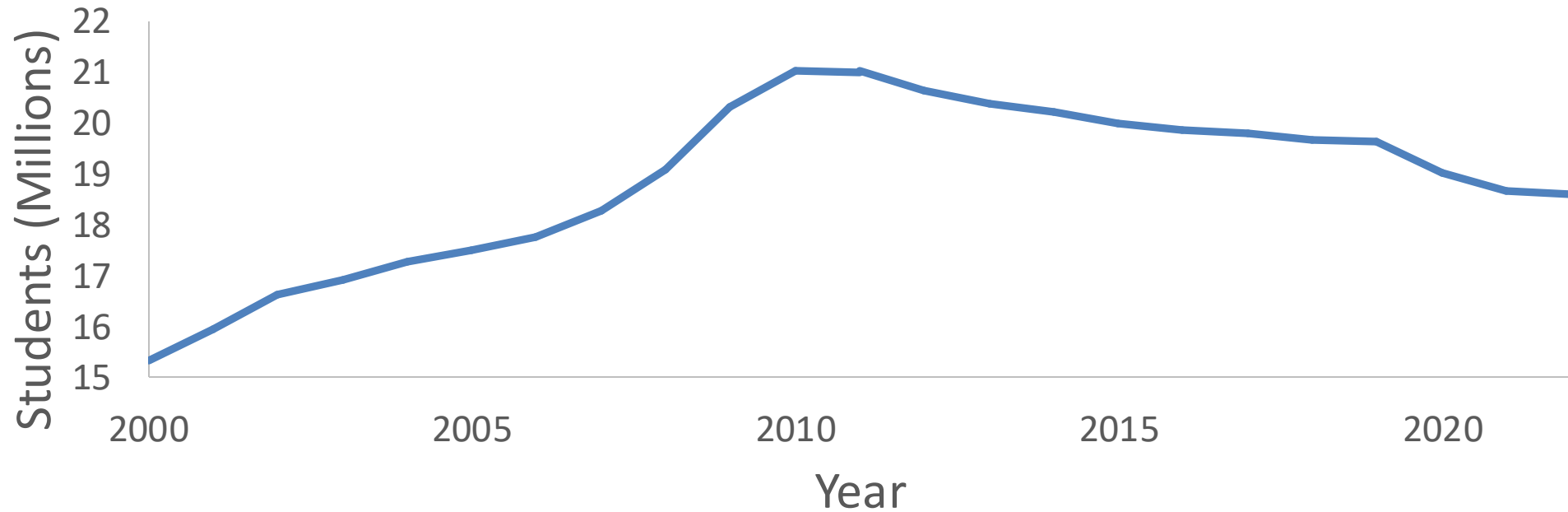
Source: Digest of Education Statistics (2023)

Age of Reversal: 2010-present

Enrollment Decline

Great Recession and beyond

Postsecondary Enrollment, 2000-2022

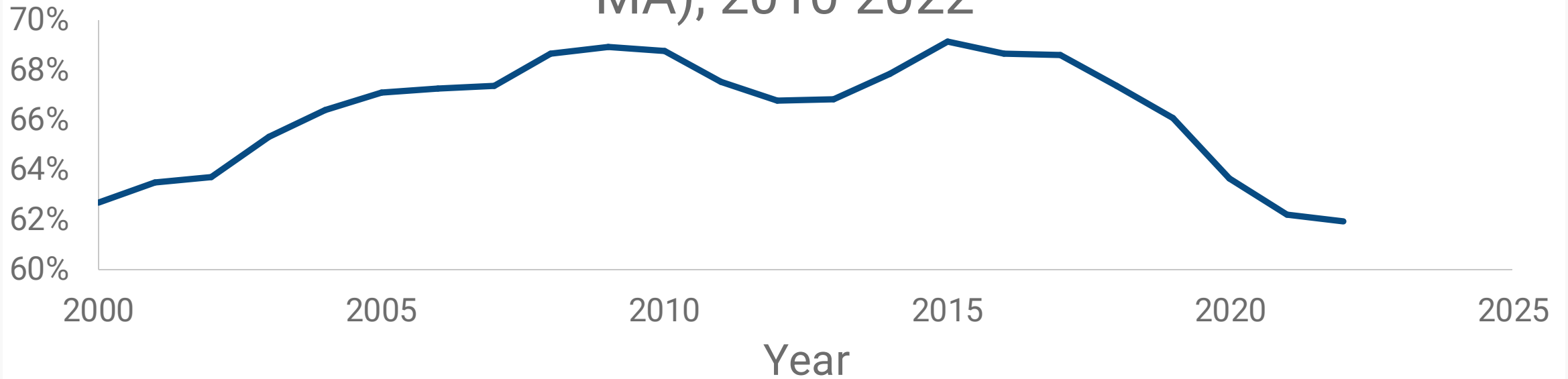


Source: Digest of Education Statistics (2023)

Enrollment Decline

Lower matriculation rate, not demographics

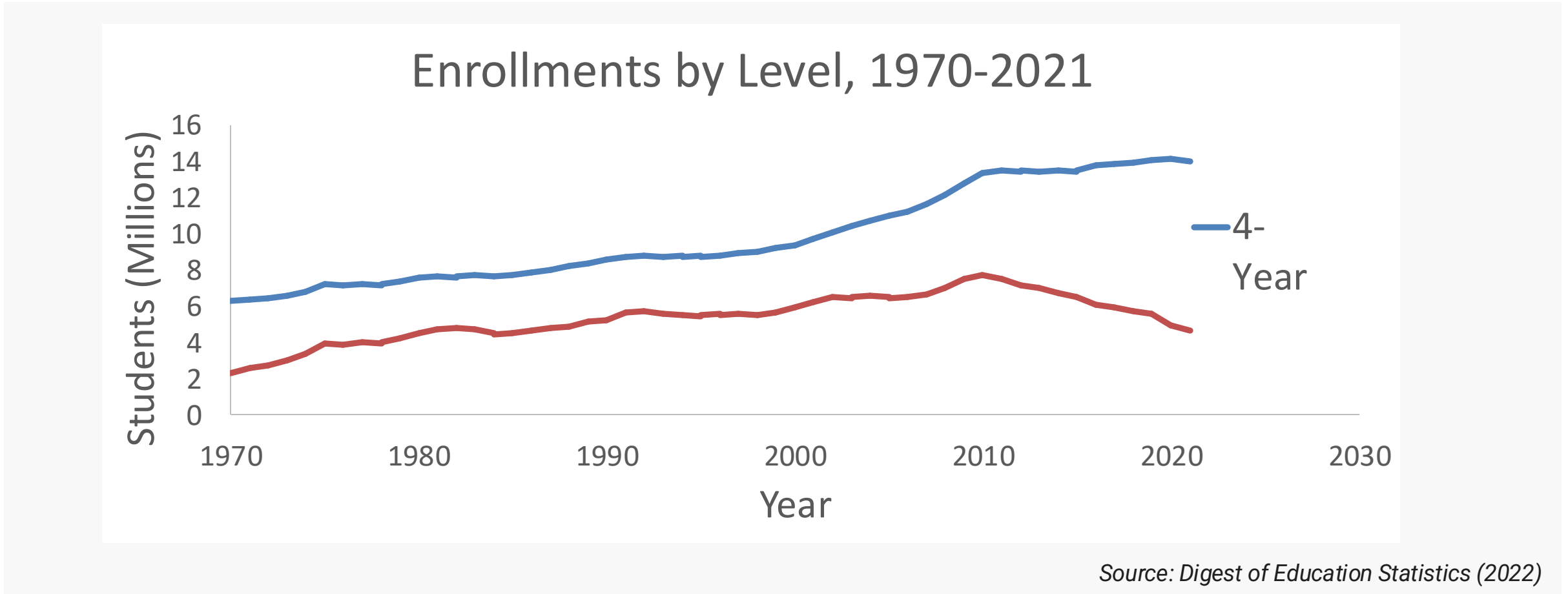
Matriculation Rate among Recent HS Grads (3-Yr MA), 2010-2022



Source: Digest of Education Statistics (2023)

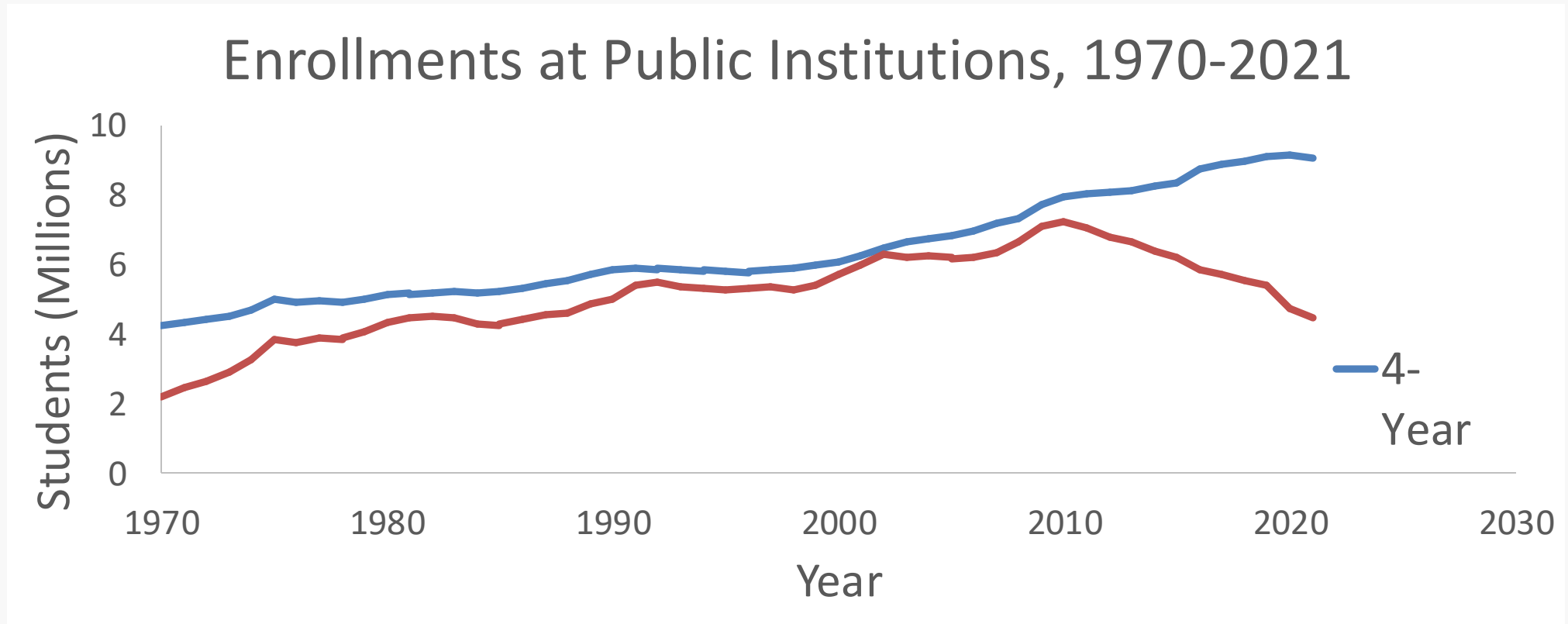
Enrollment Decline

Large difference in recent paths of 2- and 4-year institutions



Enrollment Decline

Resilience of public 4-year institutions

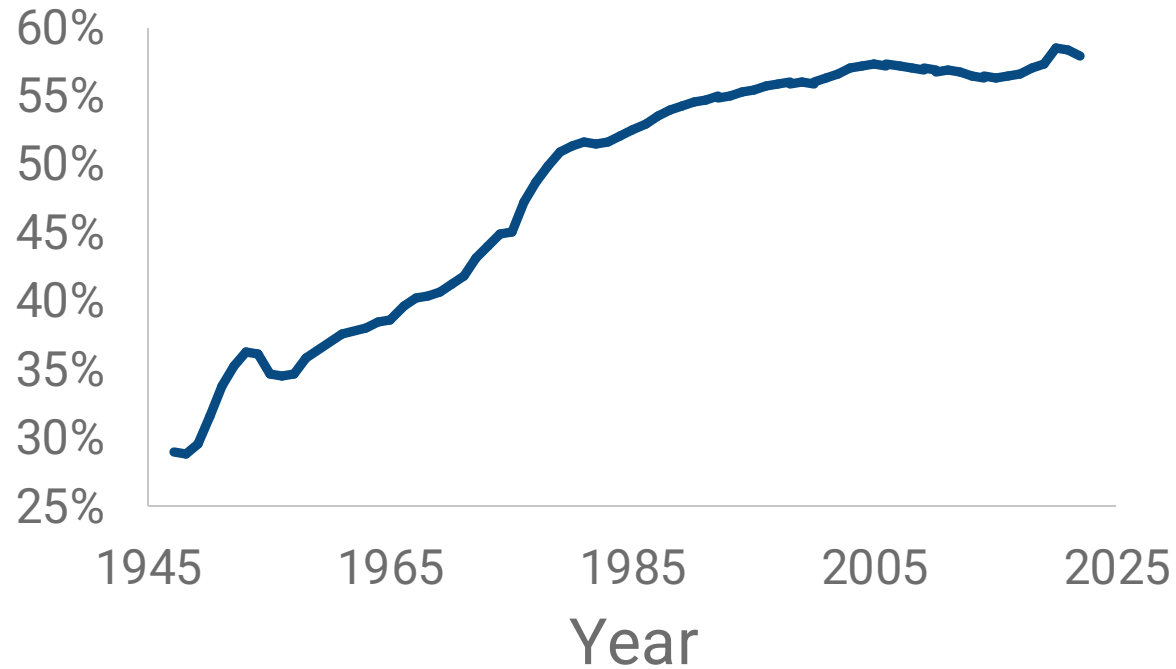


Source: Digest of Education Statistics (2022)

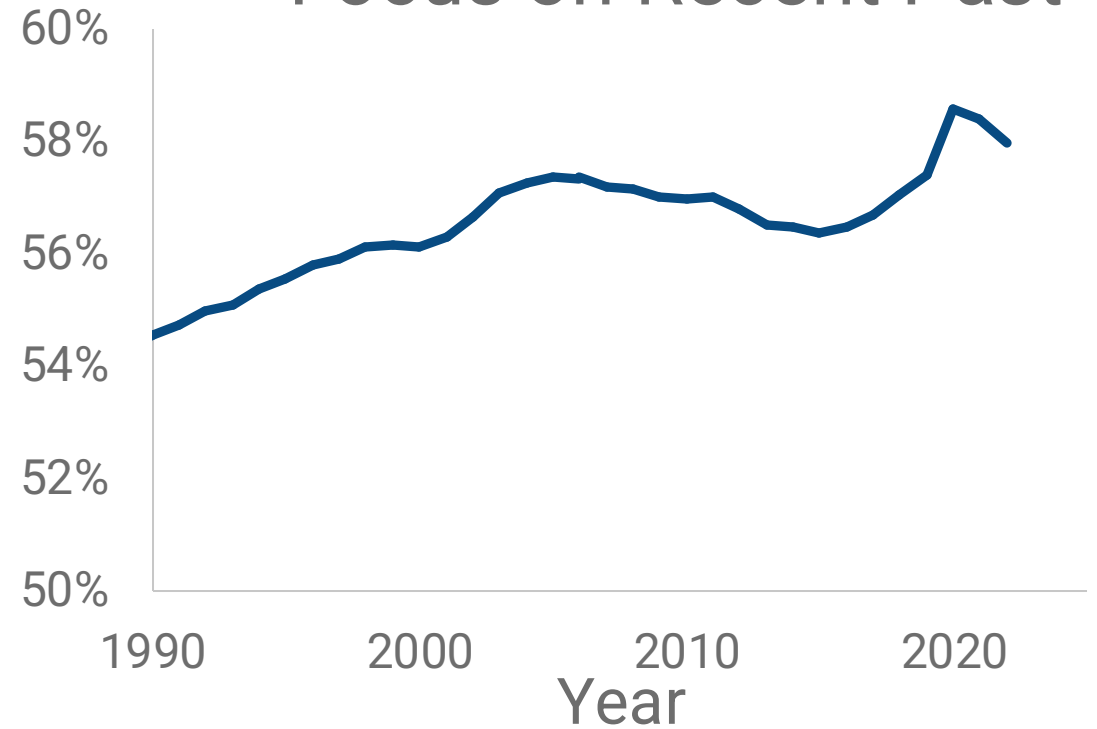
Aside: The Gender Divide

Old issue drawing new attention

Female Share



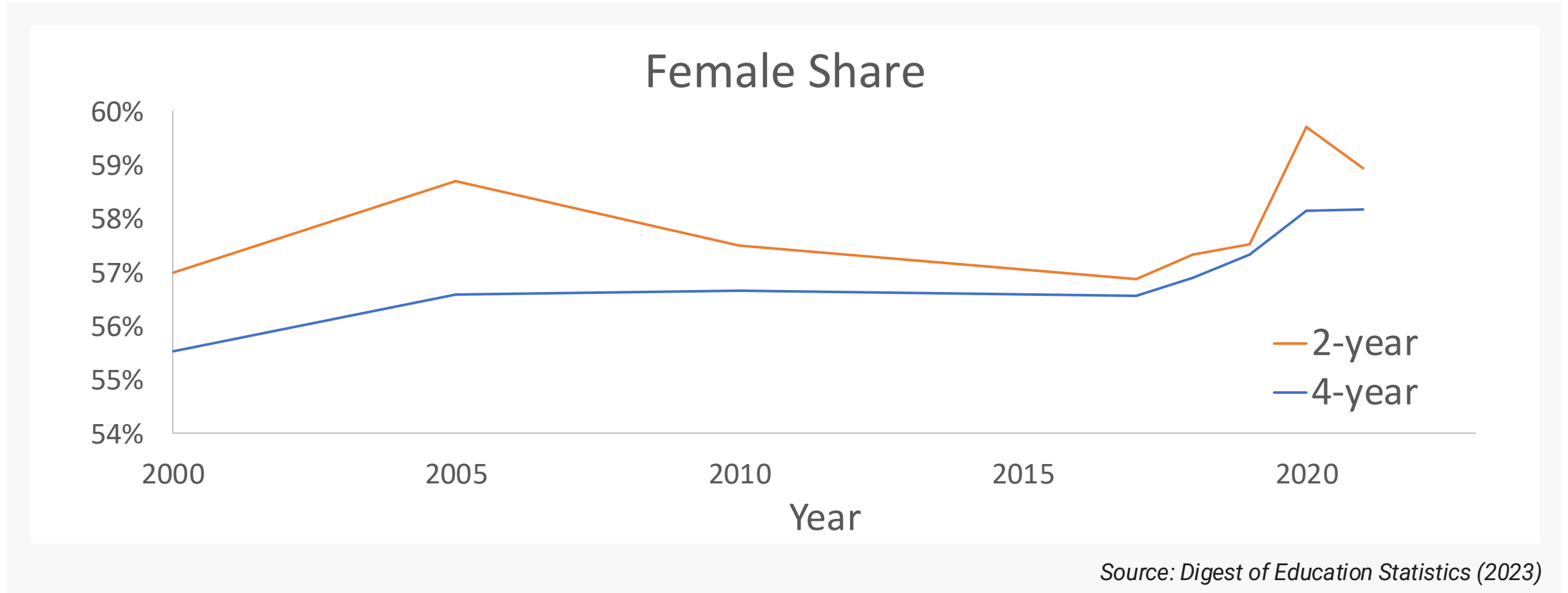
Focus on Recent Past



Source: Digest of Education Statistics (2023)

Aside: The Gender Divide

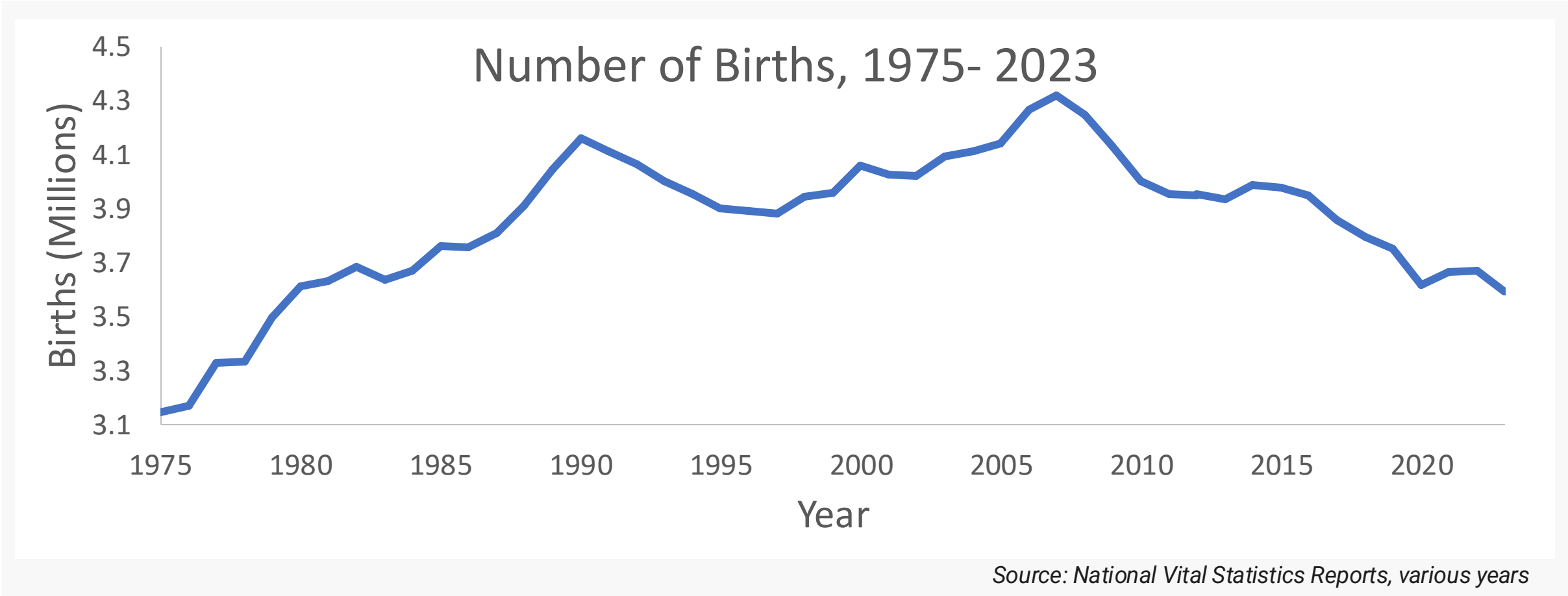
Generally stable prior to pandemic



Future Challenges: present-2040s

History of US Births

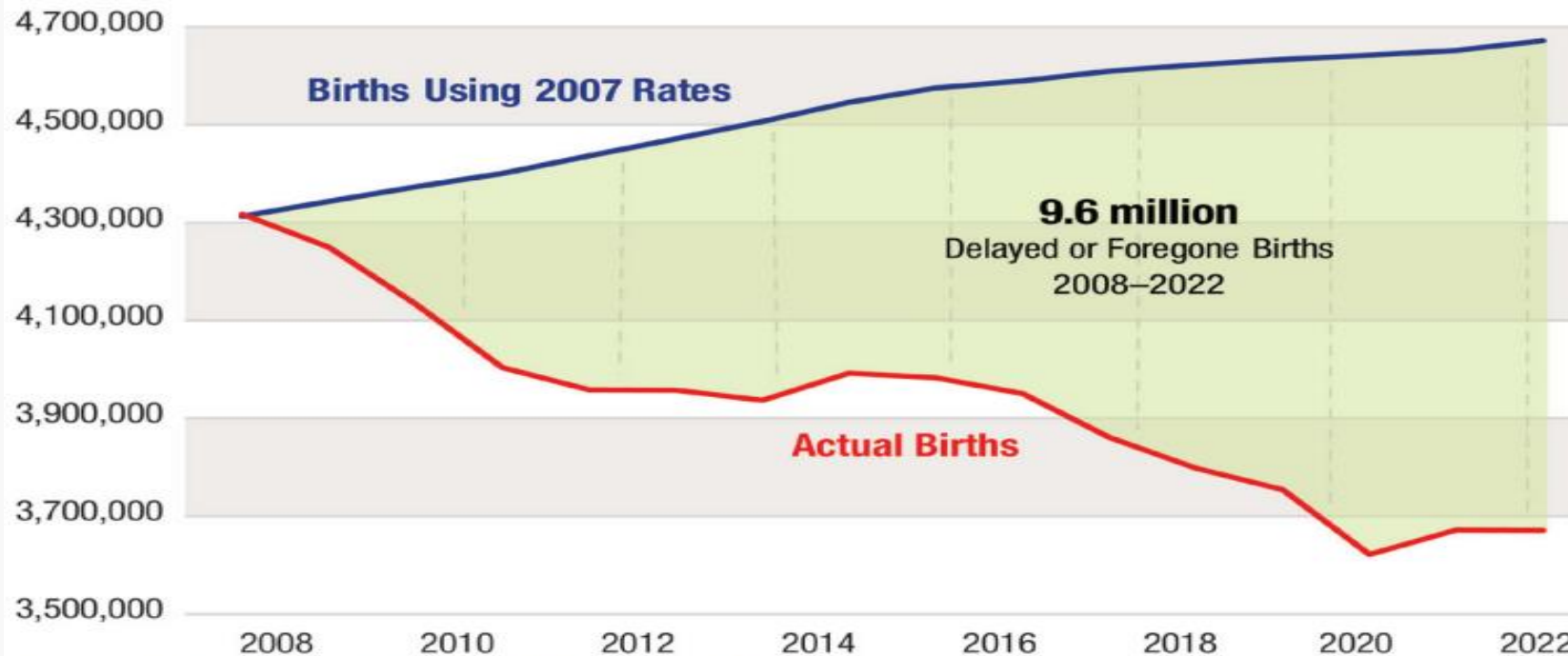
In 2023, births reached a 44-year low.



Consequence of Fertility Decline

Cumulative total: More than 10 million delayed or foregone births through 2023

ACTUAL BIRTHS PER YEAR COMPARED TO BIRTHS USING 2007 BIRTH RATES, 2007 TO 2022

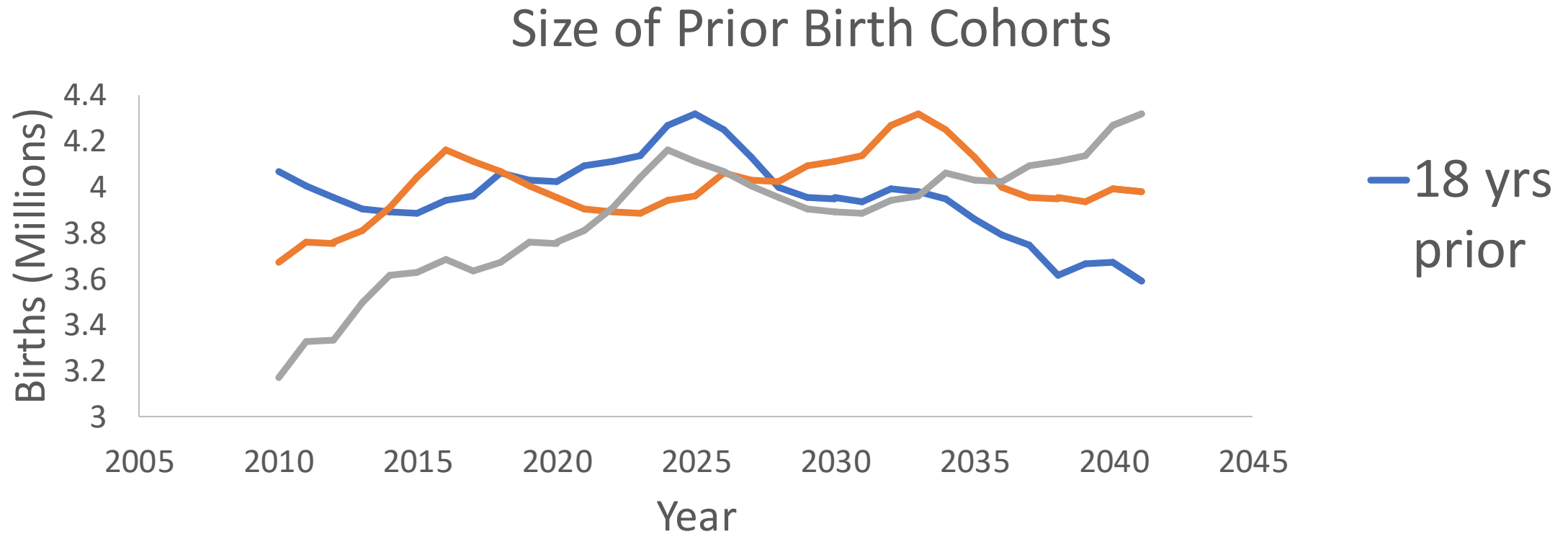


Source: National Center for Health Statistics, 2023

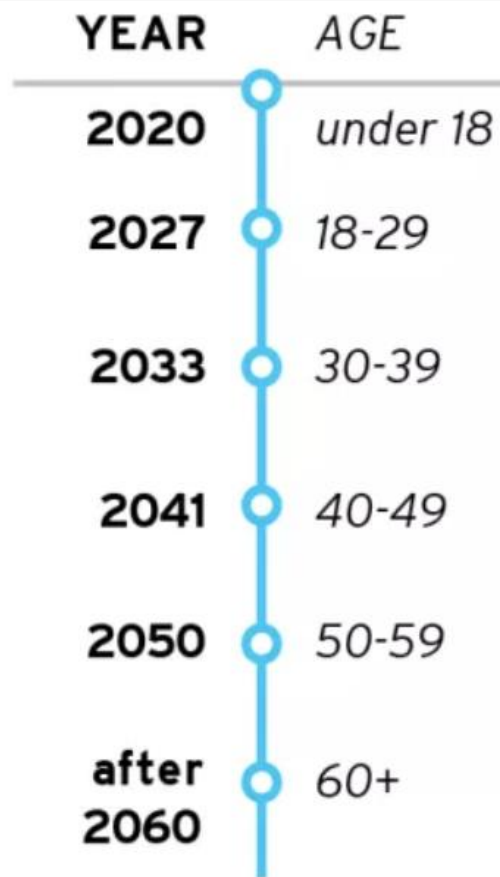
Source: Kenneth M. Johnson (2021)

Nontraditional vs traditional pool growth expectations

Institutions serving non-traditional students have more time 'til demographic pressure



Source: National Vital Statistics Reports, various years



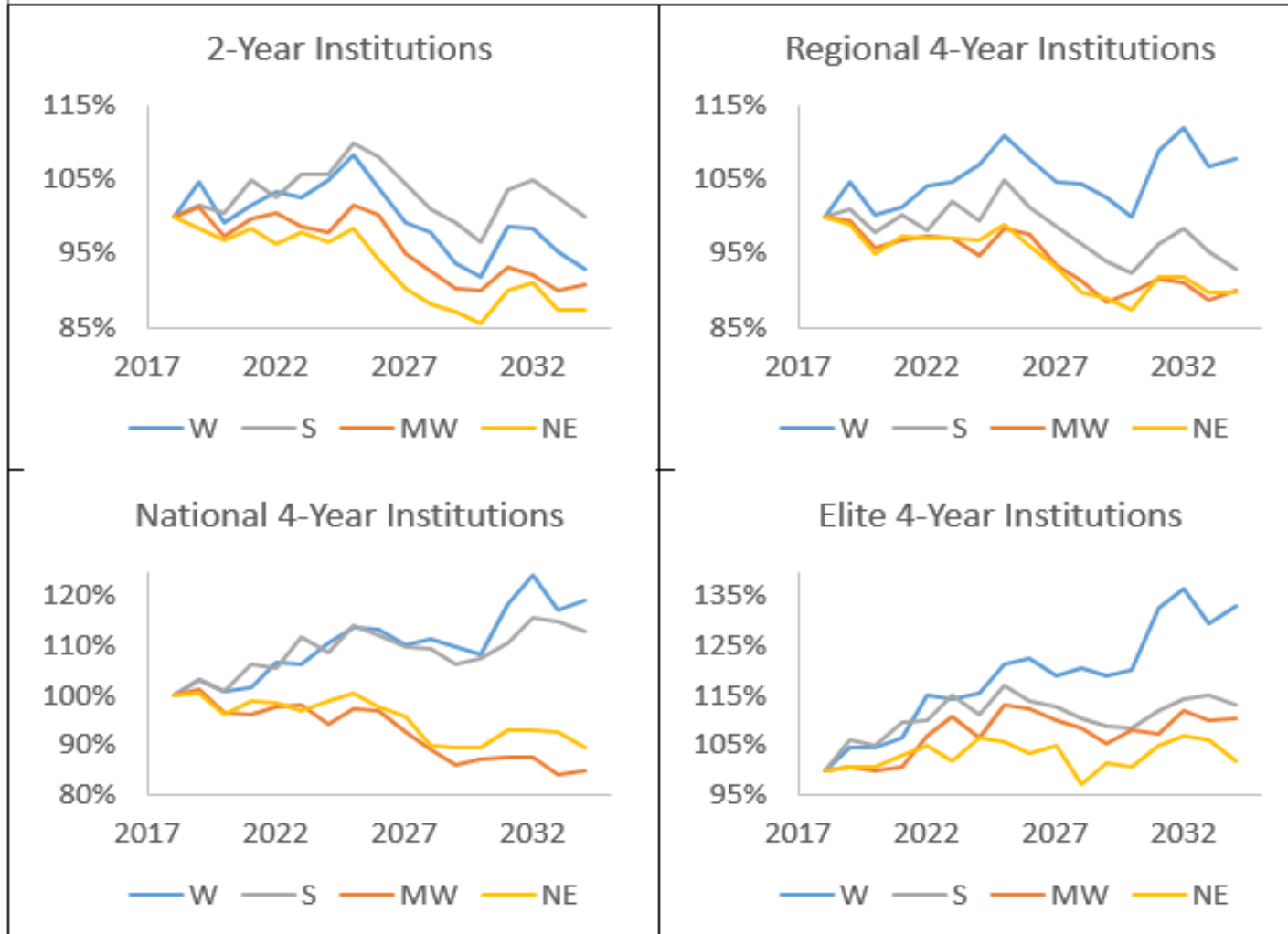
Year When Non-Hispanic Whites Become Minority

- Tipping-point year around mid-century
- Younger generations are more diverse
- Those under 18 have already passed tipping-point year
- Those of traditional college-going age reach tipping point in next decade.

Source: William H Frey analysis of U.S. Census population projections released March 13, 2018 and revised September 6, 2018

B Metropolitan Policy Program
at BROOKINGS

Projected Number of College-Going Students Relative to 2018, by Region



Source: Author's calculations based on data from the American Community Survey (2017), Centers for Disease Control and Prevention National Vital Statistics Reports (2018, 67(7)), 2009 High School Longitudinal Study (restricted and unrestricted), and the Panel Study of Income Dynamics (2011; 2015)

Public Policy: Responses and Questions

What is the role of the state higher education system?

How, if at all, should the system seek to balance enrollment across institutions?

How, if at all, should the system coordinate recruitment and applications?

How, if at all, should programs be coordinated across institutions?

Is the purpose of the flagship to recruit talent or educate residents?

What factors are important in the location of campuses?

THE CHRONICLE OF HIGHER EDUCATION

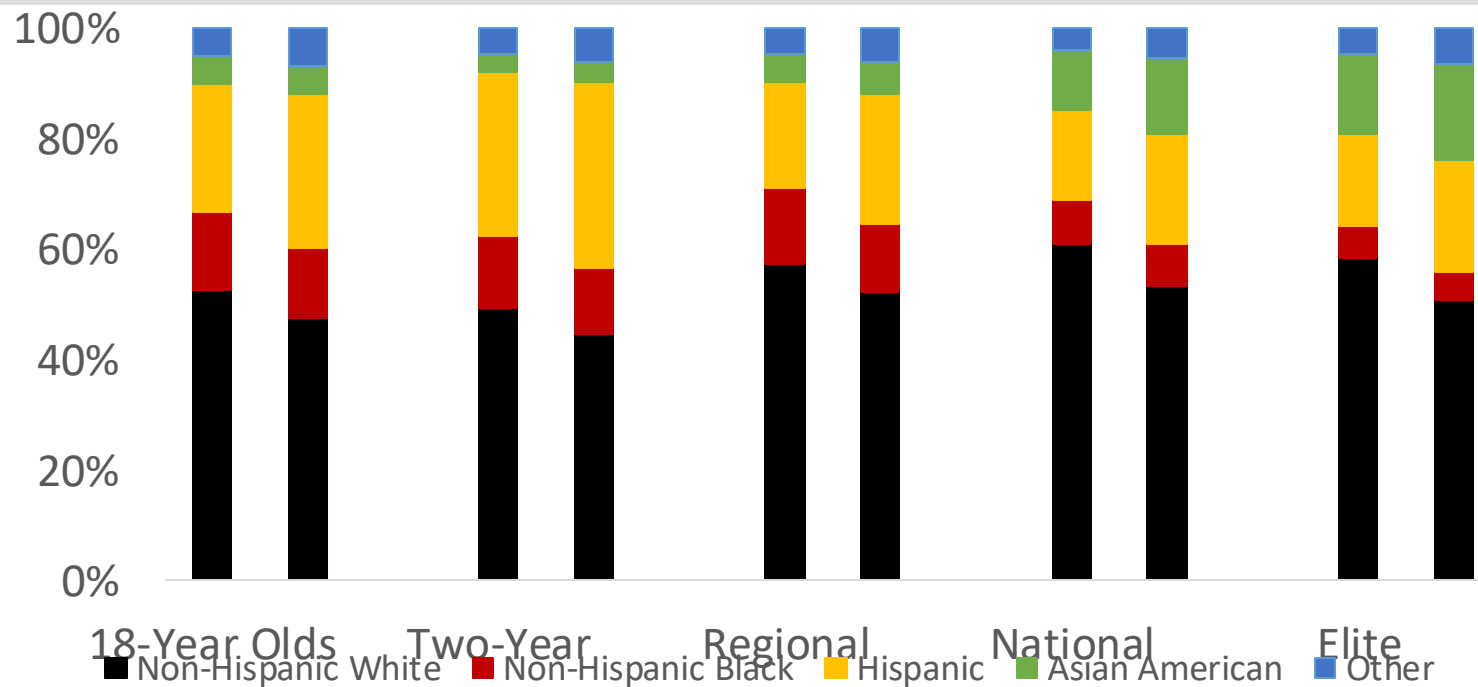
Flagships Are Enrolling More and More Freshmen From Out of State

By *Audrey Williams June* | JANUARY 24, 2024

Access Pt 1: Under-Represented Groups

Diversification is baked into nation

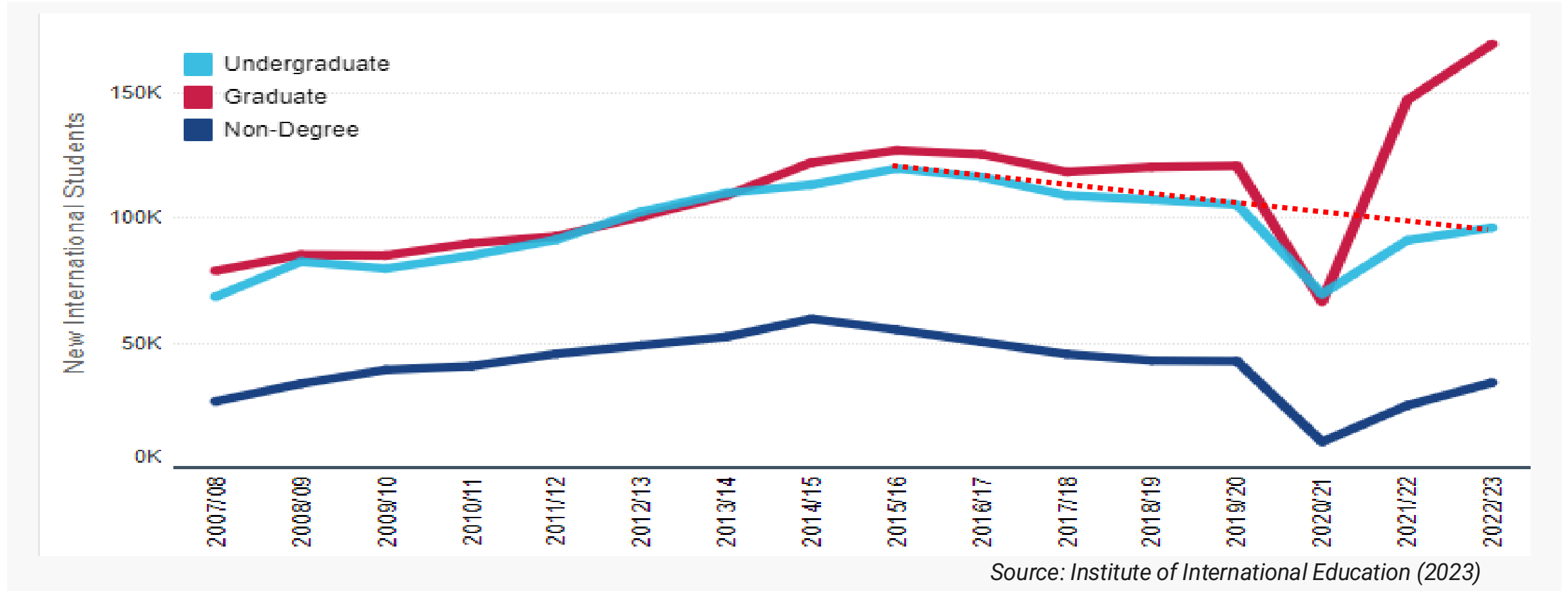
Race/Ethnicity Distribution of College-Going Students, 2018/19 and 2033/34



Source: Author's calculations based on data from the American Community Survey (2017), Centers for Disease Control and Prevention National Vital Statistics Reports (2018, 67(7)), 2009 High School Longitudinal Study (restricted and unrestricted), and the Panel Study of Income Dynamics (2011; 2015)

Access Pt 2: International Students

Evidence of increased competition



Access Pt 3: Adult Learners

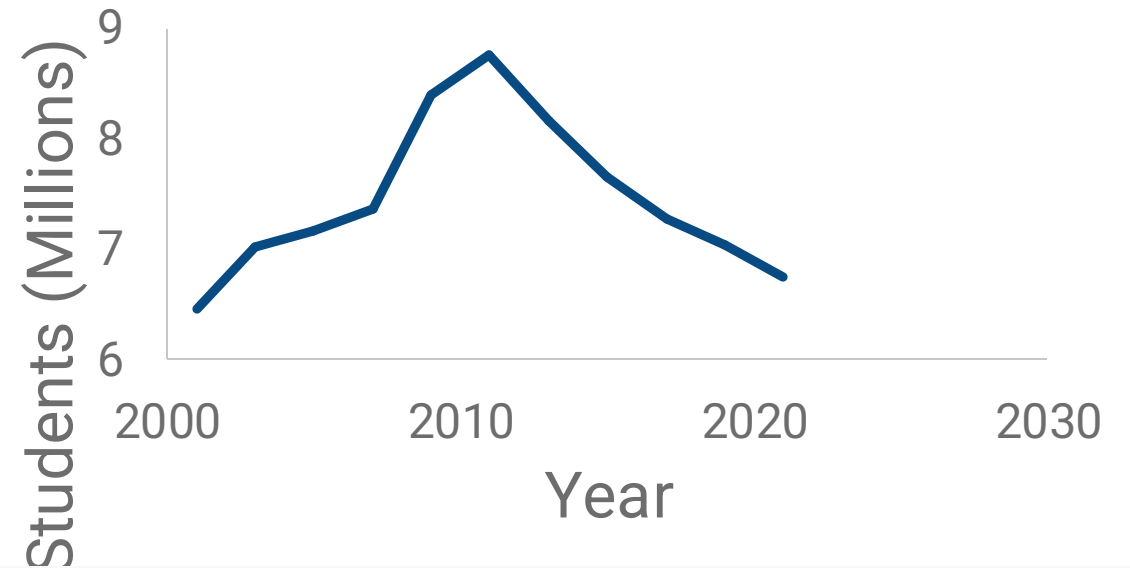
Not an easy, go-to market

**Employment Level:
Ages 25-54**

104 Million

Source: US Bureau of Labor Statistics (2024)

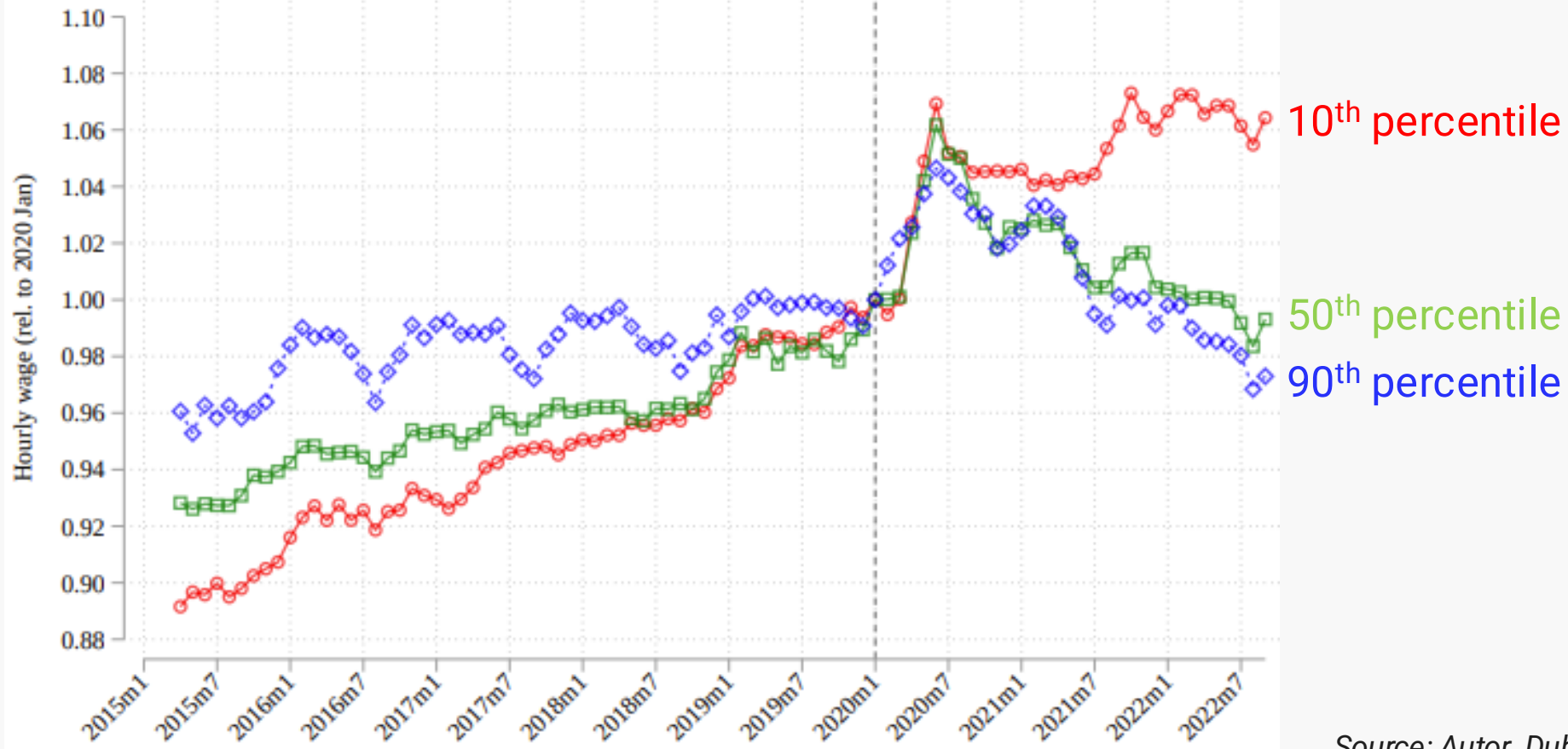
Enrollments Ages 25+, 2001-2021



Source: Digest of Education Statistics (2022)

Access Pt 3: Adult Learners

Wage compression → declining return to college degree



Source: Autor, Dube, and McGrew (2023)

Access

Challenging arithmetic

Currently

Population = p

HS graduation rate = g

Matriculation rate = 62%

Enrollments $E = 0.62 * p * g$

Possible Future

Population = $0.83p$

HS graduation rate = g

Matriculation rate = m
increases sufficiently to
maintain enrollment

Solution

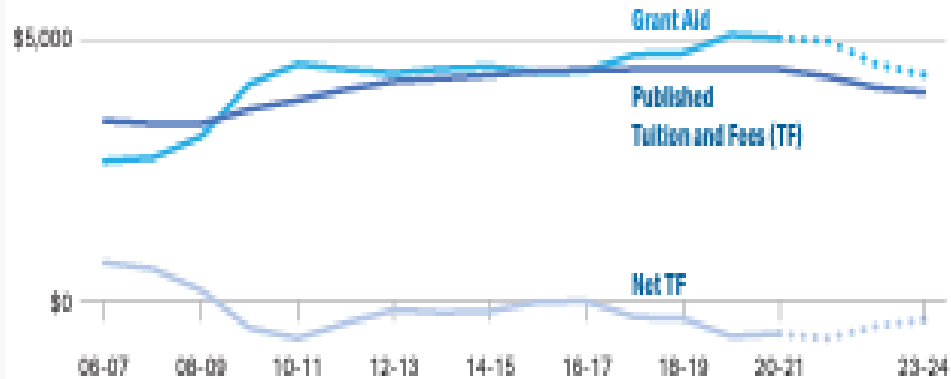
$$m = \frac{1}{0.83} * 0.62 = 0.75$$

Access

A warning

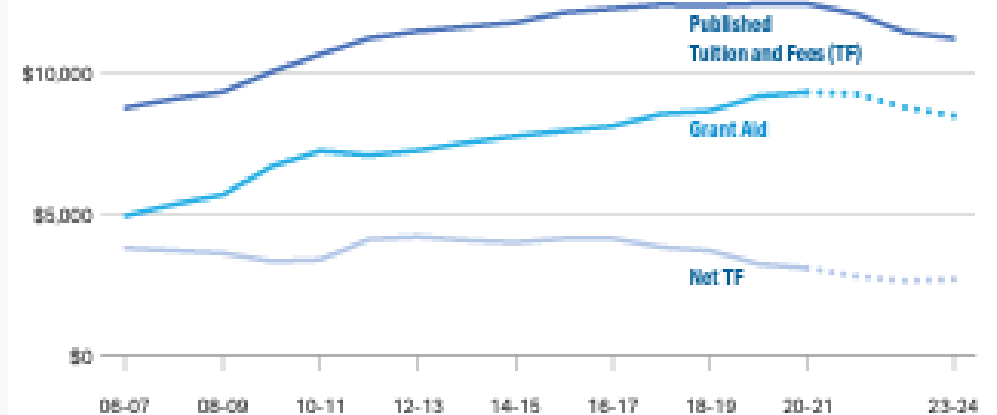
Average Net Price: Public Two-Year

FIGURE CP-8 Average Published and Net Prices in 2023 Dollars, First-Time Full-Time In-District Undergraduate Students at Public Two-Year Institutions, 2006-07 to 2023-24



Average Net Price: Public Four-Year

FIGURE CP-9 Average Published and Net Prices in 2023 Dollars, First-Time Full-Time In-State Undergraduate Students at Public Four-Year Institutions, 2006-07 to 2023-24



Source: College Board (2023)

Student Success

The logo for California State University, Dominguez Hills (CSUDH) features the letters "CSUDH" in a bold, sans-serif font. "CSUD" is white and "H" is yellow, all set against a maroon rectangular background.

CSUDH

MALE SUCCESS ALLIANCE

The Rutgers logo consists of the text "THE STATE UNIVERSITY OF NEW JERSEY" in a black, sans-serif font, positioned above the word "RUTGERS" in a large, bold, red, serif font. The entire logo is framed by two horizontal black lines.

THE STATE UNIVERSITY OF NEW JERSEY
RUTGERS

Student Success



Accelerated Study in Associate Programs (ASAP)

Public Policy Reform

Universal FAFSA and direct admissions



**NATIONAL
COLLEGE
ATTAINMENT
NETWORK**



Direct admissions

Direct Admissions Minnesota

Direct Admit Wisconsin



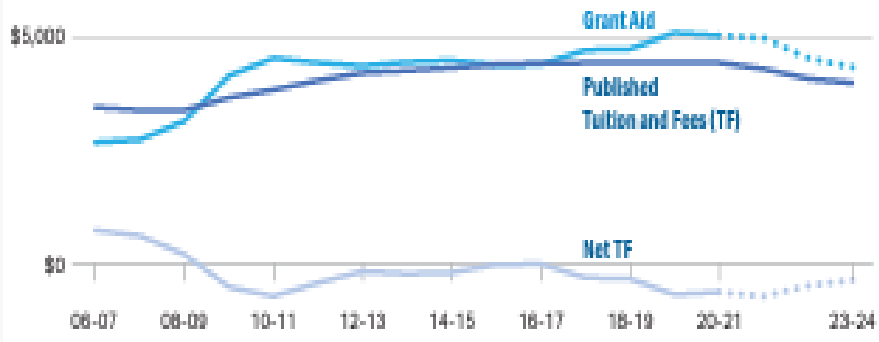
FastPass
HAWAII

Public Policy Reform

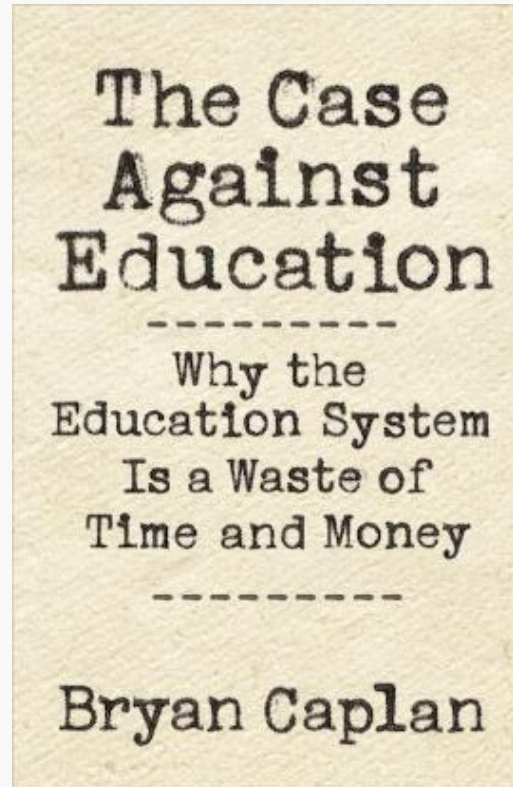
Free College for All

Average Net Price: Public Two-Year

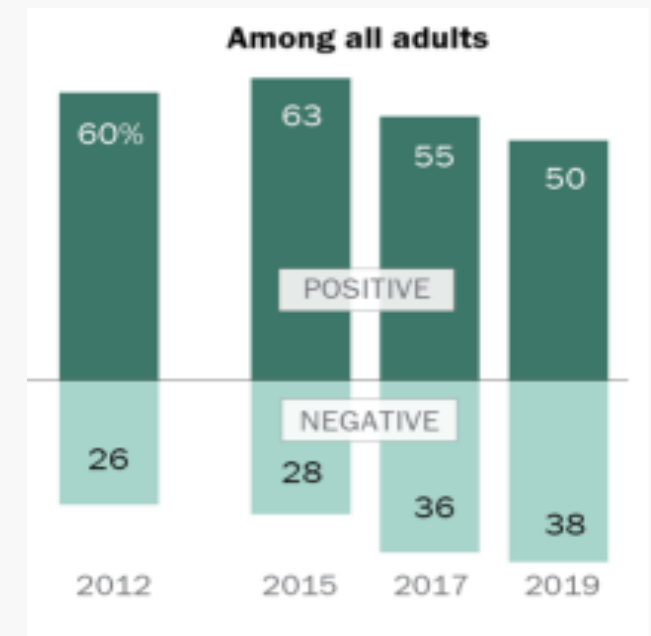
FIGURE CP-8 Average Published and Net Prices in 2023 Dollars, First-Time Full-Time In-District Undergraduate Students at Public Two-Year Institutions, 2006-07 to 2023-24



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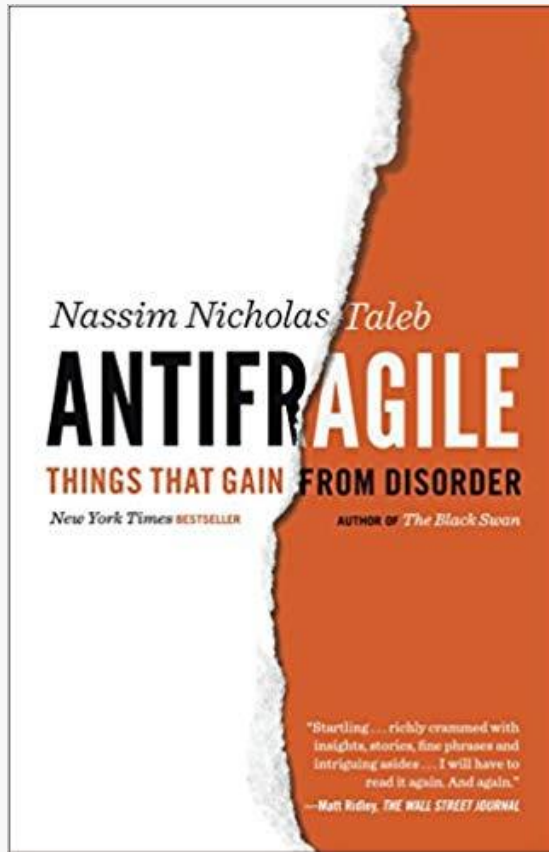


Share of Americans saying colleges and universities have a ___ effect on the way things are going in the country



Source: Pew (2021)

A Constructive Metaphor



“Antifragility is beyond resilience or robustness. The resilient resists shocks and stays the same; the antifragile gets better.”

Thank You

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Data Sources

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